



# Travel and Expense Policy

**Document Approval** (signature/date)

Chief Financial Officer: _____	<i>George Clark</i>	10/19/2021	George Clark
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## 1. PURPOSE

SLAC National Accelerator Laboratory is operated by Stanford University, funded by the U.S. Department of Energy (DOE) and complies with the DOE contractually required travel policies, procedures and the [DOE & Stanford University Prime Contract](#). The SLAC Travel and Reimbursement Policy establishes requirements to pay for necessary and reasonable travel expenses incurred by personnel after approval is obtained for authorized SLAC business, including attending conferences. The intent of this policy is that such payments be fair and equitable to the traveler and SLAC and is consistent with the travel expense and reimbursement reporting requirements of Stanford University and the U.S. Department of Energy.

## 2. AUTHORITY AND APLICABILITY

This policy applies to domestic and international travel by all SLAC or Stanford University personnel, visitors, guests, contractors, students or any person traveling on authorized SLAC business. SLAC follows Stanford University and federal laws and regulations applicable to travel expense and employee income tax reporting requirements, including Internal Revenue Service (IRS) regulations, and the Federal Financial Accounting Standards.

## 3. PROGRAM DESCRIPTION

### 3.1 Guiding Principles

SLAC operates its business travel management program with integrity while supporting the Laboratory Mission and providing business travelers with appropriate levels of services and security at the lowest possible cost. The program maximizes SLAC's ability to negotiate discounted rates with preferred suppliers via Stanford University and other outside sources. The program also supports company initiatives and manages travel expenses demonstrating prudent stewardship to the federal government.

All employees are required to use the SLAC T-Card for SLAC official business travel and are responsible for ensuring that all charges comply with SLAC's Travel & Expense Policy and the SLAC Travel Card Policy and Procedures. There will be a transitional period from 10/4/2021 - 11/30/2021 where employees who used their personal card can seek reimbursement. Beginning 12/01/2021 the T-Card policy mandate will be enforced, with any exceptions being approved by the Controller.

## 4. RESPONSIBILITIES

This policy covers SLAC / Stanford employees, visitors, guests, contractors, and students who are authorized to travel on official SLAC business. All official travel for employees must be approved prior to departure, use the most [economical means](#) (unless specified otherwise in this policy), and be within per diem guidelines (as set by the [U.S. General Services Administration](#)). Air transportation should meet the requirements of the [Fly America Act](#). Expense reports should be supported by appropriate documentation. The procedures are covered below and can be located on the Travel@SLAC [website](#).

Responsibilities related to travel include the following individuals and groups:

### 4.1 Travelers

- SLAC employees are required to obtain pre-authorization in Concur and use the SLAC booking channels for all official business travel. Pre-authorization includes obtaining supervisor and CAM (Cost Account Manager) approval. Additional approval by Travel@SLAC should be obtained for conference requests.
- SLAC employees are required to use a SLAC TCard for official business travel in accordance with the [SLAC TCard policy](#).

- Travelers are responsible for complying with SLAC travel policies and procedures.
- Travelers should discuss travel expectations with their manager who has knowledge of the work or is responsible for managing the funding source of the trip.
- Travelers should submit expense reports in Concur within 30 working days after returning from each trip. If transactions are not reconciled within 60 days of completion of travel, they may be tax reportable to the traveler.
- Travelers are required to act with honesty and integrity and comply with applicable laws at all times when transacting Laboratory business. Travelers are encouraged to read Stanford University's [Anti-Bribery policy](#), which provides guidance regarding bribery and corruption, and requires reporting of actual or suspected incidents of bribery and corruption.

## 4.2 Foreign Travel

- In addition to the approvals stated above, travelers are required to receive country clearance from the U.S. Embassy in the country to be visited before the start of the travel. [Travel@SLAC](#) will begin the eCC process as soon as a trip request is submitted and reaches the travel office queue.
- DOE requires travelers to obtain [security briefings](#) prior to embarking on foreign travel to sensitive countries. Other DOE and State Department foreign travel trip requirements are listed on the [Travel@SLAC website](#).
- Travelers should be aware of their responsibility to report suspicious behavior that may involve foreign intelligence efforts or other inappropriate attempts to gather information. Please refer to the [SLAC Counterintelligence website](#) for more information.
- Travelers should comply with all pertinent requirements associated with the [Foreign Travel with Export Controlled Materials Guide](#) as defined by [SLAC Export Control](#).
- Travelers to foreign locations are expected to comply with applicable immunization requirements associated with the travel unless a medical exception is granted by [SLAC Occupational Health](#). [Travel@SLAC](#) recommends that all travelers planning trips to foreign countries should visit the [U.S. Department of State travel website](#) for current updates on health, safety, and other information concerning the foreign country to be visited. Prior to international travel, travelers should seek SLAC Occupational Health Clinic guidance. Travelers should note that some vaccines or medications need to be ordered, and/or provided, weeks in advance of travel in order to provide adequate protection.
- Travelers should ensure all appropriate documents (e.g. passports, business visas, country-specific requirements, international cell phone numbers) are valid and on hand for their travel. More information on this can be located on the [Travel@SLAC website](#).

## 4.3 Supervisors and Cost Account Managers

- Supervisors and CAMs are expected to review, approve, and monitor compliance via Concur travel requests and expense reports.
- Supervisors and CAMs should approve travel in Concur ensuring travel purpose is appropriate, cost effective, and in support of the Lab mission.
- Supervisors and CAMs should ensure the travel funding source is aligned with the employee's time & effort funding source in accordance with the [SLAC Charging Guidelines](#). Travel expenses should usually be charged to the same funding source as the associated time and effort. If an employee charges their travel expense to a different funding source than where the effort was charged, the employee, supervisor

or the Cost Account Manager should provide a justification for this discrepancy and attach this to the expense report in Concur.

#### 4.4 Business Approvers

- Business Approvers should review submitted expense reports to ensure adequate justifications, appropriate funding, and all required receipts and documentation are provided prior to their approval in Concur.
- If rejected, Business Approvers should add a note to the expense report in Concur to indicate a reason for rejecting the expense report.

#### 4.5 Travel@SLAC

- Travel Analysts should review Concur expense reports to verify compliance with the SLAC Travel policy.
- As required, Travel Analysts should provide guidance to travelers, so they understand their responsibilities for compliance with the appropriate SLAC, Stanford University, and U.S. Government policies and directives on travel.
- Travel Analysts are responsible for routing electronic country clearances to respective state departments after obtaining a foreign trip request in Concur.

### 5. PROCEDURE

This Procedure has the following subsections:

#### 5.1 General

1. SLAC guidelines covering approvals for the business trips, transportation expenses, subsistence expenses (meals/ lodging), and miscellaneous other travel expenses are prescribed below. General information covering travel expense deadlines and expense report submissions is also covered below, and in detail on the [Travel@SLAC website](#).
2. [Travel@SLAC](#) obtains electronic Country clearance (eCC) via DOE's Foreign Travel Management System (FTMS) for all foreign travel, regardless of funding source.
3. If the traveler's first stop for SLAC business is at a domestic location before traveling on to a foreign country location for SLAC business, the traveler is required to follow the requirements for foreign travel.

#### 5.2 SLAC Travel Card

1. Travelers are required to apply for and use the SLAC Travel Card (T-Card) for official business travel and to avoid out-of-pocket expenses.
2. Only official travel expenses can be incurred on the SLAC T-Card. For example if you have personal days added to your business trip, only the business days can be charged.
3. Exclusions to this policy permitting use of personal funds for reimbursement include.
  - A. Application Process - Not meeting the T-card application requirements and therefore being denied access to a T-card.
  - B. Lost or Stolen T-Card - If your T-card has been lost or stolen and you are in the process of reporting this and still need to make travel expenses.
  - C. Meals and Incidental (M&IE) - All meals should be paid for out of pocket by the traveler, the T-card should not be used for M&IE expenses.
  - D. T-Card Limitations - The monthly T-Card spending limit has already been

exceeded.

- E. Personal Expenses- For example when there is a hotel bill with unallowable charges included. The unallowable charges would need to be paid out of pocket by the traveler- The T-card should not be used for any personal &/or unallowable expenses incurred while traveling on behalf of SLAC. Please refer to section [4.1.6](#) of the [T-Card policy](#) for guidance on how to itemize in Concur.
  - F. Split Travel - reference 5.11.3 of this policy.
  - G. Contracted Organizations - Travel managed and guaranteed by third party organizations who subsequently invoice SLAC for cost reimbursement must abide by SLAC's Travel Policy. The use of a T-card is not required.
4. The SLAC Controller reserves the authority to grant exceptions to this policy to meet SLAC business needs should extenuating circumstances arise.
- A. More information about the purpose, benefits and restrictions of the SLAC Travel Card can be accessed in the [Travel Card Policy](#).

### 5.3 SLAC Booking Channels

In order for SLAC to provide support for pre-authorized business travelers, SLAC requires the use of SLAC booking channels as described in the Travel Policy below. This method takes advantage of Stanford University's negotiated rates with preferred travel vendors, connecting travel reservations automatically to the university's Travel Registry ([ISOS](#)). As a result, Stanford/ISOS are able to locate SLAC employees in an emergency and/or provide assistance as needed.

- 1. SLAC booking channels service fees are an allowable expenditure with an approved Concur pre-travel authorization for SLAC business.
- 2. SLAC booking channels are accessible via the [Travel@SLAC webpage](#).
- 3. Business rules in the SLAC booking channels, or a booking agent of the SLAC booking companies, may assist the traveler in complying with SLAC guidelines. However, the traveler always retains final responsibility to ensure their travel complies with this policy.
- 4. There are some circumstances where faculty, staff, postdoctoral scholars and students may not be able to book airfare, hotel lodging and rental car through SLAC booking channels, such as:
  - A. Conference hotels (which may be booked directly at the conference rate).
  - B. Laboratory and university guest houses
  - C. Airline ticket reissues or exchanges.
  - D. New hires, visitors, sponsored guests, faculty (non CWR-SU employees), students (non CWR-SU employees), postdocs (non CWR-SU employees) and fellows are excluded from the booking tool section of this policy.
- 5. 100% leisure travel is not permitted to be booked via SLAC Booking Channels; exceptions include the United Corporate Direct "Break for Business" leisure discount, to add a personal side trip to a business trip or to accompany SLAC travelers on a SLAC-related trip.

### 5.4 Pre-Travel Authorization

- 1. All official SLAC travel local or otherwise is required to be requested by the traveler and authorized by the Traveler's supervisor and Cost Account Manager (CAM) in [Concur](#), prior to the commencement of the trip, and before the traveler incurs any

travel expense.

2. If authorization for travel is not obtained in Concur and the traveler departs for their trip, travel expenses may not be expensed.
3. The DOE and Department of State authorize all official foreign travel, regardless of funding source. A foreign travel request is considered fully approved when [Travel@SLAC](mailto:Travel@SLAC) has approved this in Concur. DOE and the Department of State require country clearances for official travel to a foreign country prior to the travel start date. [Travel@SLAC](mailto:Travel@SLAC) obtains country clearances through the Foreign Travel Management System (FTMS) on behalf of the traveler. An automated email notification from Concur is sent to the traveler once clearance has been obtained.
4. A foreign travel trip request should be submitted by the traveler in Concur at least 35 calendar days before the departure date. If the High Threat Security Overseas Seminar (HTSOS) training is required by the U.S. embassy in the country being visited, then 45 days is recommended. Countries requiring HTSOS training can be found on the [Security Requirements](#) page of the [Travel@SLAC website](mailto:Travel@SLAC).
5. If travel plans change to include additional days, a change of destination, or country sensitivity (e.g., from non-sensitive to sensitive), then the travel request must be re-approved in Concur. Travelers should be aware of the list of sensitive countries, as DOE approval for travel to any of these countries may take longer. Travelers should refer to the [Travel@SLAC website](mailto:Travel@SLAC) for the most up-to-date information.
6. All visitor travel should be authorized in advance by the appropriate member of the Senior Management Team (SMT) or the Directorate Business Manager (BM) with designated signature authority hosting the visiting person. Also, the respective BM should authorize requests for visitors who will be visiting SLAC for longer than six months.
7. Conference attendance must be approved by [Travel@SLAC](mailto:Travel@SLAC). When submitting a trip request in Concur with a Training/Registration expense line included, it will automatically route for conference approval. Conference approval may take up to 3 weeks depending on factors such as number of attendees, cost, and DOE sponsorship. If a conference cost exceeds the \$100k threshold, additional approval from the CFO will need to be obtained by [Travel@SLAC](mailto:Travel@SLAC).
8. Travelers are required to indicate if the travel involves presentations of scientific publications in the Concur Trip Segment expense line.

## 5.5 Making Travel Arrangements

Travelers are required to incur expenses for SLAC business travel that are allowable, allocable, reasonable, and not for personal use.

1. Travelers should arrive/depart a maximum of 24 hours before or after the business activity has been conducted. Additional time is considered personal unless justification is received from the traveler such as significant total travel cost savings, and the justification should be reviewed and approved by [Travel@SLAC](mailto:Travel@SLAC) prior to the trip.
  - A. Personal traveler points/miles applied to obtain amenities or upgrades should be documented and attached to the expense report to show that SLAC funds were not used. Personal traveler points/miles used to fund any part of business travel airfare, upgrade, or amenity will not be reimbursed as a business expense.
  - B. Personal traveler points/miles are the responsibility of the traveler and are not reimbursable for any business travel made with the use of these points/miles.
2. Concur will automatically calculate [General Services Administration \(GSA\)](#) per diem allowances regarding lodging, meals and incidental expenses.



3. Expensing of costs is limited to the lesser of the Lowest Logical Airfare (LLA), typically coach class airfare, or the actual cost of an alternative transportation method. For example, if choosing to travel by rental car at a cost of \$400 when LLA for the same trip would have been \$350, the allowable expense is limited to \$350.
4. Travelers should apply unused travel funds to future business travel, if possible. If a date extension or name change on the ticket cannot be made by the booking agency prior to expiration, an exception for personal use may be permitted with repayment to SLAC for the full ticket amount.
5. Ground transportation includes private automobiles, rental cars, taxicabs, trains, buses, ride sharing services, etc., and should be used when other means of transportation are unavailable, more expensive, or impractical.
6. Travelers who are unable to honor a reservation should make every effort to cancel their travel arrangements in advance with the airline, hotel, etc. so cancellation fees may be avoided. Cancellations should be made within the same SLAC booking channels they were purchased from.
  - A. Travelers are encouraged to rebook unused tickets whenever possible. If it is not possible to use the ticket/funds through rebooking, then an [Unused Ticket Affidavit](#) should be completed and submitted with the expense report in Concur. For Sponsored Guests please use the [Visitor Unused Ticket Affidavit](#).
  - B. Charges or lost refunds resulting from failure to cancel a reservation may not be expensed and must be repaid to SLAC. An Exception may be granted for extenuating circumstances at the discretion of SLAC. The justification should be provided and attached to their expense report in Concur.

## 5.6 Air Travel

1. All airfare purchases for SLAC business travel should be at the [LLA](#) or as specified in section 5.4.4. Travelers are required to use the SLAC booking channels to purchase tickets and make other international travel arrangements. SLAC is required by contract to comply with the Fly America Act, which states that only U.S. flag carriers shall be used by travelers on authorized SLAC business.
  - A. In order for the traveler to be expensed using SLAC funds, the airline ticket must bear a U.S. flag carrier flight number. An example detailing US flag carrier flight numbers can be found within the [Fly America Act Webpage of Travel@SLAC](#).
  - B. Any exception to the Fly America Act must be fully documented in a [Fly America Act Waiver Checklist](#) and attached to the expense report in Concur. The checklist waiver form contains the list of exceptions for flying on a U.S. flag carrier.
2. SLAC will normally reimburse reasonable airline transportation expenses:
  - A. Travel agent fees - which should not be more than the SLAC booking channels for a similar booking.
  - B. Cost for transportation to and from the traveler's home to the airport in the following instances:
    - i. SLAC will reimburse costs for transportation to and from the traveler's home to the airport in the following instances: Recording mileage from the work/home location to the airport when using a personal vehicle.
    - ii. Using a taxi, shuttle, or ride sharing services.
    - iii. Parking expenses incurred while on travel for either a personal or rental vehicle.
3. All travelers are expected to travel at the [LLA](#) with the following criteria:

- A. Leaves or arrives within a one-hour window on each side of the traveler's desired departure or arrival time.
  - B. Allows the traveler to choose airports.
  - C. Is a nonstop flight, if requested by the traveler.
  - D. Does not include charter flights.
  - E. Does not include circuitous routing when a stopover is required.
4. Travelers are required to use coach class or similar discounted airfare for all travel. Upgraded business or first-class airfare should meet criteria identified in this policy in section [5.6.5](#) below; or accommodations for a disability or other medical need, are allowable. The disability or medical need must be substantiated in writing by a medical authority and be approved by the [SLAC Occupational Health Center](#). Exceptions to the criteria outlined in this policy for the purchase of a higher-class airfare are made for the following circumstances:
- A. When the traveler prefers an upgraded class airfare and has no disability or medical need, the traveler is required to pay the incremental cost increase.
  - B. The traveler may use their personal frequent flyer miles/points to upgrade from coach/economy class airfare and provide documentation that there is no additional cost to SLAC.
5. SLAC allows the purchase of business class airfare when all the following conditions are met:
- A. Travel is for a SLAC or Stanford employee travelling on SLAC business.
  - B. Travel is to an international destination.
  - C. Total flight time, including reasonable stopovers and change of planes exceed 14 hours.
  - D. Travelers are required to report to duty on the day after their arrival, or sooner.
  - E. Travel should not be circuitous in nature.
  - F. The Concur pre-trip authorization request should state the request is for business class airfare.
6. Travelers may purchase their airfare in advance once they have obtained supervisor & CAM approval for their Concur pre-trip authorization request. This does not apply to sensitive country travel.
7. SLAC will reimburse travelers for the cost of checking one personal bag. If the traveler is carrying SLAC materials or equipment with them, the traveler should refer and adhere to the [Foreign Travel with Export Controlled Materials Guide](#).
8. SLAC will not reimburse discretionary costs that are considered personal choice and are, therefore, the responsibility of the traveler, such as, but not limited to:
- A. Seat upgrade, when flying coach/economy class.
  - B. Issuance or renewal of passport or Government ID for domestic travel.
  - C. Trusted traveler program (e.g. TSA Pre-Check, Global Entry, etc.).
  - D. Airline change charges incurred for non-business reasons.
9. Documentation of Fare Comparisons - SLAC booking channels are the required booking method for booking air travel. Generally, documentation of fare comparison is not required when the business trip is booked according to this policy. Fare comparison documentation is required when any of the following occur:
- A. The trip includes a personal component

- B. The itinerary is an indirect route.
- C. The fare class is out of policy.
- D. The most economical method of transportation is not selected for a trip, for example, a rental car is selected instead of air travel.
- E. The fare comparison documentation is most often in the form of a screenshot. The search results should be taken the same day of booking from a SLAC booking channel. The screenshot must visibly note the time and date of the search (i.e., from the taskbar on your desktop); include a broad set of search results (e.g., all applicable carriers); and should display the applicable parameters, such as the most direct route, excluding any personal stops and the appropriate fare class (e.g., coach, non-refundable). The expense report must include an attachment with the fare comparison documentation.
- F. If the attached screenshot is dated post-travel, [Travel@SLAC](mailto:Travel@SLAC) will calculate an online comparison at the time of processing and will pay based on the lesser of their own comparison or that provided by the traveler. For guidance on documenting a fare comparison, refer to the [Documenting a Fare Comparison Quick Start Guide](#).

## 5.7 Meals and Lodging

The traveler is responsible for being aware of the federal per diem rates for business locations prior to departure, noting that [domestic per diem rates](#) are updated annually and [foreign per diem rates](#) are updated monthly. When a trip includes more than one SLAC business destination and the cities involved have different per diem rates, the per diem rate for each calendar day is determined by the location where the lodgings are obtained for that night and are calculated automatically in Concur. (Note that CERN is at a reduced per diem as indicated on the [Travel@SLAC foreign travel webpage](#)).

1. Travelers are required to book lodging through the SLAC booking channels to obtain negotiated rates. Lodging expenses are allowable at actual costs not to exceed federal per diem rates.
  - A. Actual lodging expenses should be less than or equal to the per diem rate and an itemized receipt should be uploaded into their Concur expense report. Domestic lodging per diem allowance does not include lodging taxes or any other related taxes. Sales tax is allowable but will not be calculated in the per diem amount.
  - B. If lodging is at a conference hotel or unavailable at (or below) the per diem maximum, a detailed written justification should be included with the Concur expense report. 300% of the per diem maximum, excluding any related taxes, may be allowable at the discretion of SLAC.
  - C. Refer to the [Personal Travel Expense of Spouse and Others](#) section of this Procedure for expenditure allowance rules when the business traveler and others whose attendance does not constitute a business purpose occupy a double occupancy hotel room.
  - D. Lodging at a property owned by the traveler is not allowable.
2. Travelers should submit an itemized hotel receipt for actual lodging expenses. Non-lodging expenses such as meals and internet access should be claimed under the appropriate Concur expense heading (M&IE, miscellaneous expense, etc.), excluding lodging or other related taxes. Expense report submission guidelines can be found [here](#).
  - A. Charges that are not lodging or other related taxes should be appropriately categorized and not included under the lodging expense line in Concur. Meals on a hotel bill (or included within the nightly room rate) are considered M&IE

- and should not be claimed separately.
- B. If needed, travelers are advised to take their SLAC ID and a copy of the [DOE Contracting Officer's official travel letter](#) to support per diem lodging rates and additional discounts available to government contractors. The SLAC ID and letter should only be used for official business travel.
  - C. Travelers are recommended to avoid booking lodging that requires a deposit or that has non-refundable change or cancellation terms. Travelers should provide a prompt cancellation notice to hotel to avoid "no show" penalties, if plans change.
3. Travelers booking outside of SLAC booking channels should enter their travel itinerary information in the [ISOS Travel Tracker](#). Some exceptions to lodging can be referred to in section [5.3.4](#).
  4. Travelers should provide timely notice to the hotel and/or SLAC booking company when the length of a stay is shortened to avoid early checkout penalties.
  5. Meals and Incidental Expenses (M&IE) are reimbursed at federal per diem rates. Meals for non-employees and sponsored guests will be reimbursed at actual cost up to federal per diem rates. (Refer to the [Sponsored Guest Travel Expenses](#) section additional guidelines).
  6. Meals and Incidental Expenses for trips under 12 hours are not reimbursed.
  7. Per Diem amounts for the first and last day of the trip are reimbursed at 75% of the M&IE rate applicable for the business destination city visited. The location where lodging is obtained for the first and last night determine the rate for the departure and return days, respectively.
    - A. Employees are required to exclude appropriate meals provided (i.e. breakfast, lunch, dinner) during their travel from their expense report in Concur, such as meals that are part of a registration, meals provided by the business site being visited, meals included in the hotel rate, or meals directly paid by SLAC.
    - B. Receipts are not required for M&IE expenses as reimbursement will be at the standard per diem rates.
  8. Unallowable expenses include.
    - A. Alcohol and related charges
    - B. Entertainment
    - C. Expenses incurred for other travelers who do not have SLAC travel authorization
  9. Weekends, holidays, and other necessary standby days may be counted as business days only if they fall between business travel days. If non-business days are at the beginning or end of a traveler's business activity and the traveler arrives early or remains at the business destination for non-business reasons more than 24 hours before or after the business activity, expenses may not be allowed for the additional days.
  10. The traveler must meet the following conditions in order to expense non-business travel days that form part of approved business travel:
    - A. Travelers should document cost savings at the time of booking their airfare, comparing actual cost to cost of coach airfare covering business days only. There must be total travel cost savings, including additional lodging and M&IE, reviewed and approved by [Travel@SLAC](mailto:Travel@SLAC) prior to the trip.
    - B. The extra days must be at one business location only when the business trip covers more than one location.

11. Costs incurred for personal travel associated with the business trip are considered personal expenses and are unallowable.
12. A trip of less than 50 miles one way from SLAC is considered local travel and does not qualify for meals and/or lodging. Lawrence Berkeley National Laboratory and Lawrence Livermore National Laboratory are considered local travel destinations. Lodging is allowable if the travel authorization or visitor invitation contains documentation that the travel distance between the business destination point and the traveler's residence is 50 miles or longer and a member of the SMT approves a written justification for required lodging. An exception may be approved for a traveler whose residence is less than 50 miles from the destination point when the assignment requires workdays in excess of 12 hours, thereby putting traveler safety at risk. In this extraordinary circumstance, the traveler should submit a domestic travel authorization and include all of the following documentation when submitting an expense report:
  - A. A written justification, including backup documentation for the length of each day in excess of 12 hours. Examples of backup documentation might include an invitation letter, meeting or review agendas, beam time assignments, etc.
  - B. Documented approval of the exception by the appropriate member of the SMT.

### **5.8 Business Travel Over 30 Days**

SLAC follows Stanford University's policy for business travel over 30 consecutive days in one location. Whenever possible, travelers should take advantage of lower pricing for long-term accommodations. The traveler is paid up to a basic per diem allowance of 55% of the rate for the appropriate geographic area.

1. When an individual's original estimated travel is for more than 30 days in one location, these reduced rates of 55% of the per diem rate apply from the first day.
2. When an individual in travel status at a location is granted extension to a trip originally estimated to be less than 30 days, the 30-days-or-less rate applies for the first 30 days and the more-than-30-days rate of 55% applies from the 31st day through the end of the trip.

### **5.9 Rental Cars**

1. The cost of renting a compact, intermediate or standard size car and the respective costs (e.g. gasoline) during the rental period, is allowable. Vehicle rental should be the most economical mode of transportation compared to taxis, shuttle services, and other methods of available ground transportation.
2. For larger size rental cars, the traveler should provide written explanation for the rental car upgrade when submitting their Concur expense report. Examples of the need for a rental car upgrade include:
  - A. Two or more SLAC travelers.
  - B. Extra baggage for a trip of longer duration.
  - C. Carrying large sized equipment (the traveler should ensure all [Export Control](#) guidance has been followed). Consult the [Foreign Travel with Export Controlled Materials Guide](#).
  - D. Inclement weather conditions that require a larger vehicle.
3. Renting a regular GPS equipment as part of the car rental is allowable. Usage of miles, points or rewards, to offset expenses, are not allowable.
4. To avoid high refueling charges, travelers should make every effort to refuel the vehicle before return.
5. The car rental agreement should include the name "Stanford University" (for insurance

- purposes), along with the traveler's name, whenever possible.
6. SLAC travelers should report all accidents involving rental vehicles being used in connection with business activities as soon as possible to the rental company, local law enforcement, and the driver's supervisor. Details of the accident should be provided to the Stanford Risk Management Office, per Section 6 of the [Stanford University Administrative Guide Memo 8.4.2, Vehicle Use](#).
  7. Travelers on foreign travel requiring assistance should follow instructions per the Stanford International [Travel Assistance Program](#), including calling the [ISOS call center](#).
  8. SLAC travelers should not elect additional car rental insurance within the continental United States (Includes Alaska). SLAC travelers should accept additional car rental insurance in foreign countries and Hawaii. Additional insurance coverage includes the following:
    - A. Loss damage waiver (LOW)
    - B. Collision damage waiver (CDW)
    - C. Personal accident insurance (PAI)
    - D. Personal effects coverage
    - E. Liability coverage or supplemental liability insurance (SLI)
    - F. Emergency roadside assistance (ERA) or roadside assistance program (RAP)
  9. Traffic and/or parking ticket charges are unallowable.

#### **5.10 Other Transportation**

1. Shuttle, Ride-Sharing Services, or Taxi: Travelers should expense actual costs for shuttle or ride sharing services, such as Uber, Lyft, etc. or taxi instead of a rental vehicle. Tips of a reasonable amount are allowed but are not to exceed 20% of the trip charge.
2. General Services Administration (GSA) Vehicle Travel:
  - A. Travelers may use GSA vehicles for business travel situations only. Official Use of Government Vehicles for travel must be documented and approved by completing the [Request and Authorization Form – Use of a Government-Owned Vehicle](#). Contact the [Transportation and Labor Pool](#) department with any questions.
3. Personal Vehicle: Travel by personal vehicle based on actual miles driven is reimbursed at the standard [GSA mileage rate](#) at the time of travel. This rate is pre-populated in Concur.
  - A. The standard mileage allowance is in lieu of actual vehicle operating expenses incurred while using a personal vehicle for SLAC business travel, and is reimbursed to one person only, even if there are two or more travelers.
  - B. In addition to the standard mileage allowance, necessary and reasonable charges for the following vehicle travel-related business costs are allowed: tolls, ferries, parking, bridges, and tunnels.
  - C. Traffic and/ or parking ticket charges are unallowable.
  - D. Reimbursement for private automobile use should not be more than 105% of miles determined by an internet mapping site such as Google Maps or the built-in map tool in Concur.
  - E. Employees using personal vehicles for SLAC business should conform to Stanford University's policy on insurance and accidents as stated in this policy

see [Stanford University Administrative Guide Memo 8.4.2, Vehicle Use](#).

- F. Travelers should use personal vehicle transportation option as a last resort, ensuring:
- i. Adequate personal vehicle insurance coverage is in place to cover accident, theft, or other loss as this is the first recourse for any claim resulting from business use of a personal vehicle.
  - ii. Copies of the accident report and insurance paperwork should be retained for a traffic accident while on business travel in a personal vehicle. Staff should refer to the [Stanford University Administrative Guide Memo 8.4.2, Vehicle Use](#).
  - iii. Personal vehicle expenses are reimbursed at a per-mile rate, as stipulated by the Internal Revenue Service. The IRS reimbursement rate is multiplied by miles driven (for the most direct route plus mileage at the destination). The rate covers the cost of gas and wear and tear on the personal vehicle. Reimbursement is available for parking fees and road tolls within Concur.
4. Equivalent Airfare: A traveler may choose to use an automobile or other surface transportation for personal reasons even if air travel is the appropriate mode of transportation. For this situation, surface transportation expenses may not exceed the airfare SLAC would have paid if air travel along with the normal cost of ground transportation to and from airports had been used. The cost of meals, lodging, tolls, ferries, and parking while in transit via surface transportation may be expensed if the total amount reimbursed does not exceed the equivalent airfare. Equivalent Airfare can be obtained from one of the SLAC booking channels and is determined as:
- A. Coach class fare plus ground transportation.
  - B. U.S. flag carrier and at least seven days advance purchase.
  - C. Screenshot of airfare comparison attached to the Concur expense report (reference section [5.6.9](#) of this policy).
  - D. For two or more individuals traveling together on business, the sum of all airfare and ground transportation amounts are used.
5. Travel Time Exceeding One Day: SLAC pays mileage allowance, meals, lodging, and automobile-related expenses if travel by vehicle is the most economical mode of transportation available. Otherwise, the least expensive mode of transportation will be allowed based on an airfare comparison (reference Section [5.6.9](#) of this policy).
- A. The traveler should base their mileage request on an average driving distance of 400 miles a day by the most direct route, or the actual number of days taken, whichever is less.
  - B. For two or more travelers, transportation expenses must be allocated to one traveler's expense report.
6. Other Methods of Transportation - includes rail, non-local bus, and commercial vessels when approved in advance by the traveler's appropriate member of the SMT are allowable up to the cost of equivalent airfare as defined in policy section [5.6](#).

### 5.11 Personal Travel vs. SLAC Business Travel

1. When a personal component of travel is added to a business trip, SLAC will only pay for the cost of the business component. Personal days should be noted in the Concur pre-trip request and in the Concur expense report. The traveler is responsible for all costs over and above expenses incurred outside the time spent on SLAC business, unless there are total travel cost savings as described in the [Making Travel](#)

[Arrangements](#) section of this Procedure. A SLAC T-Card should not be used for personal travel expenses.

- A. Personal leave in conjunction with foreign travel may not exceed a one personal day to two business days ratio (1:2). Travel days to and from a business location will be considered business days. Business standby days are considered business days (Refer to the [Meals and Lodging](#) section of this policy).
  - B. Any exception on foreign travel or if the travel is to a sensitive country where personal days are more than the allowable one personal day to two business days ratio requires Directorate ALO justification attached to the Concur trip request, and Travel @SLAC approval. Expenses should not be incurred prior to [Travel@SLAC](#) approval.
  - C. For vacations that have been booked prior to the employee being made aware of business trip obligations, the 1:2 ratio does not apply. Documentation is required to support the original planning and booking of the vacation prior to notification of the need for a business trip. This should be reviewed and approved by [Travel@SLAC](#) on the Concur travel request. Allowable expenses will be limited to the following:
    - i. Transportation between the business location and personal location.
    - ii. All other allowable business expenses while at the business duration.
    - iii. Documentation would be required to support the original planning and booking of the vacation prior to notification of the need for a business trip.
2. Expense Receipts - The traveler's business expense receipts attached to the Concur expense report should indicate dates of expenditure. Receipts for personal travel or personal days should not be attached to the Concur expense report, as these expenses are unallowable to the traveler. If a receipt (e.g., hotel bill) is partly business and partly personal, it should be attached and appropriately annotated.
  3. Expenses Payable by Others
    - A. Travel that is partially paid by a third party - When travel expenses for SLAC are shared by SLAC and one or more external organizations, even if only a minority of the travel expenses are sponsored by SLAC, the trip is considered split. Split travel must be purchased through a SLAC booking channel. SLAC T-cards cannot be used to purchase split travel. SLAC will reimburse for the appropriate portion of the necessary travel expenses. The expenses must be outlined clearly in the expense report submission.
    - B. Travel that is fully paid by a third party - SLAC resources may not be used to book, purchase or reimburse expenses for fully externally-sponsored travel. The use of the SLAC T-card is prohibited, and travel arrangements may not be booked via SLAC booking channels. Travel that is not funded by DOE but involves presentations/ SLAC scientific publications must be reported to the [SLAC Office of Scientific and Technical Information](#).
  4. Flight layovers and Addition of Personal Time - If the traveler voluntarily chooses to include additional stops/layovers for personal reasons or has personal time added to business days when traveling on SLAC business, SLAC will pay for the cost of the business component. A comparison would be required to determine lowest costs (reference section [5.6.9](#) of this policy).
  5. Rental Cars - The cost of personal use of a rental car including, gasoline should be deducted from the total bill and appropriately annotated.
    - A. The personal portion is calculated by prorating the number of days rented for



- personal use.
- B. Extra rental car insurance costs incurred while in the 48 U.S. Continental states is considered a personal expense.
  - C. Insurance costs incurred if traveling in Hawaii or in a foreign country is also prorated between personal and business, where the personal amount is unallowable.
6. Canceled Trip - if a business trip, or the business portion of a combined personal/business trip is rescheduled or cancelled for SLAC business reasons, the associated business costs of the travel, including cancellation fees, are allowable. Justification for cancellation should be attached to the Concur expense report.

### **5.12 Personal Travel Expense of Spouse and Others**

Spouse, family member, or other person - The travel expenses of a spouse, family member, or other person who accompanies the approved business traveler, are unallowable.

### **5.13 Miscellaneous Travel Expenses**

- 1. Miscellaneous costs - Miscellaneous costs that are allowable and essential to the purpose of the authorized travel should be included on the same Concur expense report as the other travel expenses.
- 2. Insurance - Insurance costs covering life, baggage, flights, and personal automobile are unallowable.
- 3. Allowable & Essential Costs include:
  - A. Telephone, Internet access and Fax - Actual costs of necessary and reasonable business telephone calls, internet access and faxes are reimbursable. Travelers should also review the SLAC [Export Control](#) guide regarding [Foreign Travel with Export Controlled Materials](#).
  - B. Laundry - laundry costs will be reimbursed only if the business trip exceeds six days. Trips to foreign countries and locations outside the continental U.S. (e.g., Hawaii, Alaska, etc.) do not qualify for laundry reimbursement.
  - C. Passports & visas - The cost of a passport and appropriate visa for international travel for business purposes is reimbursable.
  - D. Travelers are advised to not accept free airfare or repayment of business expenses by an external entity if that action could reasonably be perceived as a conflict of interest. Travelers should consult Stanford's [Anti-Bribery policy](#) to clarify potential conflict of interest issues.
- 4. Travelers should submit an expense report that notes when a third party directly pays for part or all travel costs.

### **5.14 Sponsored Guest Travel Expenses**

- 1. Sponsored Guest Expenses - Sponsored guests are required to comply with SLAC Travel Policy and Procedures. The sponsoring member of the SMT or the Directorate Business Manager should issue a Visitor Invitation Letter approving sponsored guests to travel on behalf of SLAC that should provide a specific description of travel expenses, including direct billing, business dates of travel, and limitations on amounts to be claimed. Expenses should not be incurred prior to the date of the signed invitation letter and may not be allowed.
- 2. Sponsored Guest Expense Report - A sponsored guest's profile should be created or reactivated in Concur by an authorized administrator of the hosting directorate. The sponsored guest or a SLAC delegate can then create an expense report with an

attached signed visitor letter in Concur for reimbursement.

3. Foreign Sponsored Guests - Foreign nationals seeking DOE funding for travel expenses must provide evidence of valid immigration status to SLAC's International Services Office. Evidence includes copies of documents supporting valid US immigration status at the time of the proposed activities while at SLAC. (Immigration documents provided after the SLAC visit may not be accepted if inconsistent with the dates of the SLAC visit/activity.) [Travel@SLAC](#) cannot proceed with reimbursement of travel expenses until the sponsored guest/visitor has provided evidence of immigration status to ISO. A list of required documents by immigration status type can be found on [SLAC's VUE Center website](#).
4. For foreign nationals traveling to SLAC for non-employment reasons, SLAC does not reimburse SEVIS fees, visa application fees, or required insurance fees associated with international travel or immigration requirements. Visitors to SLAC incurring lodging expenses (per the approved visitor letter) are required to stay at the Stanford Guest House, unless there are no available rooms, in which case the visitor should stay at the most economical hotel in the surrounding area and provide backup documentation if over per diem rate.
5. Sponsored guest meal allowances should be for actual costs incurred (not to exceed per diem). In order to be reimbursed, one of the following supporting documents are required to be submitted in the Concur expense report:
  - A. All actual receipts.
  - B. Comments documented in Concur that itemize out each day's meals cost, using the actual costs regardless of whether or not they exceed per diem.
  - C. An email from the traveler that states the dollar amount they actually spent on meals (if they do not have meal receipts).

#### **5.15 Employment Interview Travel Expenses**

1. Prospective Employee - Travel expenses incurred for employment interviews by prospective employees are authorized when necessary to recruit key personnel for work positions at SLAC.
2. Written Invitation - Travel expenses are allowed to the extent authorized in a formal written invitation to the prospective employee and are subject to the SLAC Travel Policy and Procedures cost limitations for the purposes of reimbursement, including approval before the traveler incurs expenses in the recruitment process.
3. Other - Travel expenses incurred by a spouse who accompanies the prospective employee are also allowed to the extent authorized in the written invitation to the prospective employee.

#### **5.16 Student Travel Expenses**

1. Students may be reimbursed for SLAC related business travel whether or not they are employees. Refer to the [Stanford Administrative Guide Memo 5.4.2 section 3.b.13](#) for more details on Student Travel.

#### **5.17 Remote Worker Travel Expenses**

1. SLAC follows the Stanford Administrative Guide [section 2.1.20](#) to define Hybrid (telecommuting) work arrangements, and [section 2.1.21](#) to define Remote work arrangements. Eligibility and reimbursement for travel to and from SLAC for remote employees will be accordance with these sections of the SU Administrative Guide.

### 5.18 Recordkeeping and Reimbursement

1. The Concur expense report, preceded by an approved [pre-trip request](#) should include the following information:
  - A. Purpose - description of the direct relationship of the travel to an official SLAC function, including the purpose for any stopovers en-route to a business location.
  - B. Travel Dates - all days from date of departure through the return date should be included in the expense report. Personal days should be documented on the expense report, if any.
  - C. Expenses - costs for transportation, hotels, meals and miscellaneous other expenses should be listed by date and location of occurrence on the expense report.
2. Recordkeeping - Travelers are required to submit all receipts for airfare, hotels, car rentals, training/registration and any unusual expenses regardless of dollar amount, with their expense report submission. Receipts for reimbursement of M&IE or other expenses for amounts under \$75 are not required, although the amounts claimed should be certified as accurate & allowable by the traveler.
  - A. Documentation -The traveler should include the date, cost, and business reason for the expenditures on their expense report.
  - B. Expense Receipts - Original and dated receipts or invoices including method of payment for expenses of \$75 or more, airfare, car rental, training/registration and lodging should be provided as backup to a correctly completed expense report, as evidence of payment.
3. Travel receipts reflecting foreign currency must indicate conversion rates on the receipt itself or the credit card statement. Reimbursement will be administered based on the provided rates.
  - A. When the conversion rate is not provided, reimbursement will be at the rate provided by the currency conversion tool in Concur.
  - B. Credit Card Statements - are considered proof of payment but are not a replacement for itemized receipts required.
  - C. Electronic images of receipts - Electronic images attached to the expense report are considered a document of record, and the originator should destroy the original paper receipts once [Travel@SLAC](mailto:Travel@SLAC) has completed processing and the expense report has been paid.
4. Examples - expense receipt examples:
  - A. Transportation Tickets - passenger copies of air, rail, bus, and boat tickets indicating dates and times of departure, ticket/ confirmation numbers, class of service, fare basis, and cost of ticket along with proof of payment (e.g., card being charged).
  - B. Rental Car Agreements/ Bills - original car rental agreements or invoices showing proof of payment.
  - C. Hotel Bills - itemized lodging bill or express checkout itemizing room rates and taxes including proof of payment. Meals charged to the lodging bill will not be reimbursed- as these are paid as part of M&IE per diem.
  - D. Ground Transportation - expenses less than \$75 may be reimbursed without an actual receipt, although travelers should make every attempt to attach receipts. In case no receipt is attached for expenses less than \$75, the traveler attests that the amount being claimed is accurate.

5. Missing Receipts - The traveler should obtain a duplicate of a missing receipt from the respective billing agency (i.e. airline, hotel, rental car, etc.). If a required original receipt is not available, the traveler should complete a missing receipt affidavit in [Concur](#) along with an uploaded proof of payment. Credit Card Statements are considered proof of payment but are not a replacement for itemized receipts required.
6. Travel Expenses and Arrangements to be Reimbursed by Others - The traveler should submit written explanations for reimbursement to be received from other sources. The explanation should clearly detail all expenses for the trip, and include the source name, address, and amounts, even though SLAC will reimburse only the portion attributable to SLAC.
7. Expense Report Approval - expense reports are routed for approval by the supervisor and Cost Account Manager (CAM) in Concur before being reviewed by the [Travel@SLAC](#). Regardless of approval confirmation, by electronically signing the request, the traveler is attesting that the expenses relate to SLAC business and comply with the SLAC Travel Policy, and that all discounts, reductions, trade-ins, or offsets whatsoever, which reduce the expense actually incurred, are reflected in the expense request.
8. Improperly Completed Forms - The traveler is responsible for the accuracy and completeness of their expense report and submitted receipts.
  - A. If the request is not properly completed, reimbursement may be delayed.
  - B. [Travel@SLAC](#) needs to receive all required backup documents before an expense report can be processed.

**5.19 Travel Expense Approval Thresholds**

1. The following thresholds for approvals apply:
  - A. Travel under \$3,000 for domestic or \$5,000 for foreign - Approval by [Travel@SLAC](#).
  - B. Travel from \$3,000 to \$6,000 for domestic or \$5,000 to \$6,000 for foreign - Approval by the Travel Manager (or designee).
  - C. Travel over \$6,000 - Approval by the Controller (or designee).
  - D. Additional approvals are required in the following instances:

Situation	Approver
Exception - upgraded air class for non-medical reasons	CFO or Controller (or designee)
Lab Director	Stanford University Vice Provost for Academic Affairs (or designee)

**6. DOE CONTROL RISKS ADDRESSED PARTIALLY OR ENTIRELY**

If unauthorized travel occurs, there may be adverse program budget impacts and employees may be held responsible for repayment of unauthorized travel costs. This may also result in improper payment or an untimely de-obligation of funds consistent with the travel controls. For further guidance please refer to section 3.4.vii of the guidelines for [the Use of Stanford Department Administrative Funds](#) (VPN needed).

**7. DOCUMENTS AND RECORDS**

The SLAC Institutional Policies site (<https://policies.slac.stanford.edu/>) will contain the

official record for this document.

- [Stanford Administrative Guide 5.4.2 Travel Expenses](#)
- [FAR 52.247-63 Preference for U.S. Flag Air Carriers, Fly America Act](#)
- [DOE Order 550.1 Official Travel](#)
- [H.6.1.20 Conference Management \(Oct 2019\)](#)
- [Stanford Administrative Guide Chapter 2, Subchapter 1, Policy 2.1.20, StaffTelecommuting and Remote Working](#)
- [Stanford University Administrative Guide Memo 8.4.2, Vehicle Use](#)
- [General Services Administration \(GSA\) Mileage Rates](#)
- [GSA Per Diem Rates](#)
- [Federal Travel Regulation Chapters 300 to 304](#)
- [Stanford Anti-Bribery Guide](#)

Associated Documents:

- [Fly America Act Waiver Checklist](#)
- [Unused Ticket Affidavit](#)

## 8. DEFINITIONS AND ACRONYMS

**CAM:** SLAC Cost Account Manager oversees costs charged to specific projects.

**Circuitous Routing:** (of a route or journey) longer than the most direct way.

**Business Staff:** Business Staff within each Directorate with authorization to approve expense reports.

**DOE:** U.S. Department of Energy.

**eCC:** Electronic Country Clearance provided by the U.S. Department of State.

**Egencia:** A full-service travel agency/online booking tool for airfare flights, lodging and ground transportation.

**Fly America Act:** Travelers are required by [FAR 52.247-63](#) to use a U.S. flag air carrier service for all air travel funded by the U.S. Government.

**FTMS:** DOE Foreign Travel Management System.

**HTSOS:** High Threat Security Overseas Seminar.

**1-94 Card:** Form 1-94, the Arrival -Departure Record Card, is a form used by U.S. Customs and Border Protection (CBP) intended to keep track of the arrival and departure to/from the United States of people who are not United States Citizens or Lawful permanent residents (with the exceptions of those who are entering using the Visa Waiver Program or Compact of Free Association, using Border Crossing Cards, re-entering via automatic visa revalidation, or entering temporarily as crew members). While the form is usually issued by CBP at ports of entry or deferred inspections sites, USCIS can issue an equivalent as part of the Form 1-797A approval notice for a Form 1-129 petition for an alien worker or a form 1-539 application for extensions of stay or change of status (in the case that the alien is already in the United States).

**International Services Office (ISO):** The SLAC International Services Office (ISO) provides immigration support to incoming visitors, users, and employees who represent over 80 countries.

**ISOS Travel Tracker:** ISOS is a traveler tracking system that allows SLAC to locate travelers with important updates on adverse conditions that could affect their safety

including health, weather, and security alerts.

**Lowest Logical Airfare (LLA):** The LLA is the least expensive, non-refundable fare with the minimum number of stops at the time of booking.

**M&IE:** Meals and Incidental Expenses.

**Per Diem:** Daily allowance for meals and incidental expenses as set by the U.S. GSA (General Services Administration).

**Sensitive countries:** Include T4 countries (currently North Korea, Iran, Sudan, Syria); and other sensitive countries identified in the DOE S&T matrix (currently China and Russia). These lists are subject to change. Travelers should refer to the [Travel@SLAC](#) website for most up-to-date information.

**Senior Management (SMT):** Comprised of ALDs, Lab Directors, Chief Operating Officer, Chief Financial Officer and Legal Counsel.

**Trip Segments:** A portion of the trip separated from the rest of the travel due to some sort of change. I.e. a round trip flight has two segments due to a change in flights.

## 9. REVISION HISTORY

Revision	Date Released	Description of Change
R000	02/09/2011	Original release
R001	09/06/2012	Revision
R002	10/21/2013	Revision
R003	03/24/2014	Revision
R004	11/18/2014	Revision
R005	03/29/2016	Revision
R006	09/20/2016	Revision
R007	06/08/2017	Revision
R008	08/18/2020	Revision and transition to IRP policy template. New procedures to fall in line with the Site Compliance Plan (Prime Contract) and/or SLAC policy. Lab-wide benchmarked procedures aligning best practices at SLAC. Procedures implemented in Travel practice now included as policy.
R009	10/19/2021	Revision to include Booking tool and T- Card mandate impacts to benchmarked policy and procedures aligning with Stanford University. Revision to 5.13.3.A to remove international cell phone loaner request.
R010	12/01/2021	Revision to include guest house exclusion to Booking Tool mandate and updated information pertaining to permissible travel expenses for remote and hybrid work arrangements.
R011	02/23/2022	Revision to update 5.17 to align with Stanford policy on Work Arrangements. Revision to 5.13.3.A to remove international cell phone loaner request.

## 10. SYSTEMS, APPLICATIONS AND WEBSITES

- [Stanford Travel website](#)
- [Travel@SLAC website](#)

## 11. TOOLS

- [Egencia](#)
- [FCM](#)
- [United Corporate Direct](#)
- [Concur](#)
- [ISOS Travel Tracker, My Trips](#)
- [Per Diem Rates Look-Up](#)
  - [Domestic](#)
  - [Alaska/Hawaii](#)
  - [International](#)
- [U.S. Department of State travel website](#)
- [Quick Start Guides](#)