

Travel and Reimbursement Policy

Document Approval (signature/date)


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1.0 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.

2.0 AUTHORITY AND APPLICABILITY

Applicability

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.

3.0 PROGRAM DESCRIPTION

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 or rebates 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.

4.0 RESPONSIBILITIES

This policy covers SLAC / Stanford employees, visitors, guests, contractors, and students who are authorized to travel on official SLAC business. All official travel should 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 for reimbursement should be supported by appropriate documentation. The processes are covered below and found on the Travel@SLAC [website](#).

Responsibilities related to travel include the following individuals and groups:

4.1 Travelers

- 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 obtain supervisor and CAM approval in Concur before making any business travel purchases or arrangements. Note: Additional approval by Travel@SLAC should be obtained for conference requests.
- Travelers should submit expense reports in Concur within 10 working days after returning from each trip. Expense reports should be submitted within 60 days of the traveler returning from their trip.
- 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

- Travelers should not travel to foreign locations without an [approved eCC](#) (electronic Country Clearance) from the U.S. Department of State. 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 authorize travel 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 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 and/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 the reason for the rejection.

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.

5.0 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 Pre-Travel Authorization

1. All official SLAC travel local or otherwise should 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 reimbursed.
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](#) 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](#) 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 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](#).
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](#) 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](#). 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 costs exceed the \$100k threshold, additional approval from the CFO will need to be obtained by [Travel@SLAC](#).
8. Travelers are required to indicate if the travel involves presentations of scientific publications in the Concur Trip Segment expense line.

5.3 Making Travel Arrangements

Travelers should 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 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. Reimbursement 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, then reimbursement is limited to \$350.
4. Travelers should apply unused travel funds to future business travel. Travelers should reimburse SLAC for any reduction in travel costs because of itinerary changes if reimbursement has already been made.
5. SLAC takes advantage of Stanford University negotiated rates with preferred travel vendors and the discounts are loaded in Egencia. Travelers should use Egencia for their travel arrangements.
 - A. Egencia service fees are fully reimbursable when travel is for approved SLAC business.
 - B. SLAC may not reimburse travel costs or fees that exceed the cost of similar travel available through Egencia or negotiated contracts.
 - C. [The SLAC Egencia overview](#) is located on the [Travel@SLAC website](mailto:Travel@SLAC).
 - D. Business rules in the Egencia booking tool, or a live Egencia agent, may assist the traveler in complying with SLAC guidelines. However, the traveler always retains final responsibility to ensure their travel complies with this policy.
6. 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 costly, or impractical.

7. Travelers who are unable to honor a reservation should make every effort to cancel their travel arrangements with Egencia (if booked via Egencia), the airline, hotel, etc. so cancellation fees may be avoided.
 - 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 reimbursed, unless the traveler demonstrates the circumstances for the cancellation were outside of their control. A written justification should be provided and attached to their expense report in Concur.
8. Booking outside of Egencia should be documented in the [ISOS Travel Tracker](#) for traveler safety and security reasons. 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. When using Egencia, the ISOS Travel Tracker is automatically updated.
9. Travelers are encouraged to apply for, and use the [SLAC Travel credit card](#) for business travel to avoid out-of-pocket expenses.

5.4 Air Travel

All airfare purchases for SLAC business travel should be at the Lowest Logical Airfare (LLA) or as specified in section 5.4.4. It is highly recommended to use [Egencia](#) 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 reimbursed from 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 [here](#).
 - 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.
1. SLAC will normally reimburse reasonable airline transportation expenses:
 - A. Travel agent fees - which should not be more than the Egencia fees for a similar booking.
 - B. Costs for transportation to and from the traveler's home to the airport in the following instances:
 - i. 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 a rental car
2. All travelers are expected to travel at the lowest logical airfare 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.
3. SLAC does not reimburse travelers for upgraded, business or first class airfare unless it meets criteria identified in this policy or accommodations for a disability or other medical need, as travelers are required to use coach class or similar discounted airfare for all travel. 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 a higher than normal economy class airfare and has no disability or medical need, the traveler must pay the incremental cost increase.
 - B. The traveler should include a comparison to the lowest cost coach class airfare at the time of booking with their expense report submission.
 - C. The traveler may use their personal frequent flyer miles/points to upgrade from coach class airfare, and provide documentation evidence that there is no additional cost to SLAC.
4. SLAC allows use 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 non-overnight, 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 a business class airfare.

5. 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.
6. 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](#) .
7. 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 class.
 - B. 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.

5.5 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 highly recommended to book lodging through [Egencia](#) to obtain negotiated rates. Lodging expenses are reimbursed at actual costs not to exceed federal per diem rates.
 - A. Domestic lodging per diem allowance does not include lodging or other related taxes.
 - 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. The traveler may be reimbursed up to 300% of the per diem maximum. Excluding lodging or other related taxes.
 - C. Refer to the Personal Travel Expense of Spouse and Others section of this Procedure for reimbursement 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 reimbursable.
2. Travelers should submit an itemized hotel receipt for lodging reimbursement. 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 Egencia should enter their travel itinerary information in the [ISOS Travel Tracker](#).
 4. Travelers should provide timely notice to the hotel when the length of a stay is shortened to avoid early checkout penalties.
 5. SLAC does not reimburse lodging costs incurred because of voluntary changes that provides a personal benefit to the traveler, such as giving up an airline seat in exchange for a voucher and a seat on a later flight.
 6. 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).
 7. Meals and Incidental Expenses for trips under 12 hours are not reimbursed.
 8. 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.
 9. SLAC does not reimburse the following expenses that are deemed unallowable:

- A. Alcohol and related charges.
 - B. Entertainment
 - C. Expenses incurred for other travelers who do not have SLAC travel authorization.
10. 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, reimbursement may not be allowed for the additional days.
11. The traveler must meet the following conditions in order to be reimbursed for 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 prior to the trip.
 - B. The extra days must be at one business location only when the business trip covers more than one location.
12. Costs incurred for personal travel associated with the business trip are considered personal expenses and are not reimbursable.
13. 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. A reimbursement for lodging is allowable only 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 back-up documentation for the length of each day in excess of 12 hours. Examples of back-up 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.

5.6 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.

- A. 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.
- B. 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.

5.7 Rental Cars

1. SLAC will reimburse the traveler for the cost of renting a compact, intermediate or standard size car and the respective costs (e.g. gasoline) during the rental period, as long as renting the vehicle is 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 reimbursable. Other additional rental car expenses, such as frequent flyer tax, are not reimbursable.
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 local law enforcement and to 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. Additional Insurance - Travelers should not purchase and will not be reimbursed for additional insurance through the car rental agency when renting a car within the 48 U.S. continental states. The traveler is required to purchase rental insurance from the car rental agency when traveling on SLAC business in a foreign country or in Alaska and Hawaii. The cost of car rental agency insurance while traveling on business in a foreign country or Alaska and Hawaii is reimbursable. The insurance purchased is to cover the following:
 - A. Collision damage waiver
 - B. Loss damage waiver
 - C. Supplemental liability protection
9. Traffic and/or parking ticket charges will not be reimbursed.

5.8 Other Transportation

1. Shuttle, Ride-Sharing Services, or Taxi: Travelers should submit for reimbursement actual costs for shuttle or ride sharing services, such as Uber, Lyft, etc. or taxi instead of a rental vehicle.
 - A. Tips of a reasonable amount are allowed, but are not to exceed 20% of the trip charge. General Services Administration (GSA) Vehicle Travel:
 - i. 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 [Overnight Vehicle Storage Request Authorization form](#). Contact the [Transportation and Labor Pool](#) department with any questions.
2. Personal Vehicle: Travel by personal vehicle based on actual miles driven is reimbursed at the standard [Internal Revenue Service \(IRS\) 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 will not be reimbursed.
 - 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](#).

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- 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.
3. 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 reimbursement 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 reimbursed if the total amount reimbursed does not exceed the equivalent airfare. Equivalent Airfare is determined as:
- A. Coach Class fare plus ground transportation.
 - B. U.S. flag carrier and at least seven days advance purchase.
 - C. Printout/screenshot of airfare comparison from Egencia dated 7 days prior to actual travel attached to the Concur expense report. If airfare comparison provided is post-travel dated, Travel@SLAC will recalculate and determine reimbursement based on the lower of the two equivalent airfares.
 - D. For two or more individuals traveling together on business, the sum of all airfare and ground transportation amounts are used.
4. 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 reimbursed based on airfare comparison.
- 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. Transportation reimbursement is to one person only if there are two or more travelers.

5. 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. SLAC reimburses for these other methods of transportation up to the cost of equivalent airfare as defined in this policy.

5.9 Personal Travel vs. SLAC Business Travel

1. Travelers are allowed to combine personal with business travel, but reimbursement is limited to costs that were incurred for business travel purposes only. 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. 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 & 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 ALD justification attached to the Concur trip request, and Travel@SLAC approval is required. Expenses should not be incurred unless the Concur request has been approved in Concur by Travel@SLAC. Travel expenses for both personal and business days will not be reimbursed if approval from Travel@SLAC is not obtained or if the trip request is denied.
 - 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. Reimbursement would 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 will not be reimbursable to the traveler. If a receipt (e.g. hotel bill) is partly business and partly personal, it should be attached and appropriately annotated. Only business expenses will be reimbursed.

3. Expenses Payable by Others - If the cost of business travel by the SLAC traveler is shared with another organization or entity, SLAC will pay for the appropriate portion of the necessary travel expenses. When another organization or entity pays for lodging, meals, etc., the traveler must reduce the per diem appropriately in their Concur expense report. SLAC travel approval requirements still apply.
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, the reimbursement for airfare will be the lesser of the actual amount, or the cost that would have been incurred by traveling directly to the business location or traveling for business days only. A comparison would be required to determine lowest costs.
 - A. The charge that would have been incurred for a direct route or for business days only should be documented at the time of booking the actual flight, and be based on the dates required for business travel only.
 - B. A printout/screenshot of [Egencia airfare comparison](#) should be attached to the traveler's expense report. If the traveler does not provide this prior to departure, Travel@SLAC will obtain a comparison and full reimbursement may be affected.
5. Rental Cars - The cost of personal use of a rental car including, gasoline should be deducted from the total bill before requesting reimbursement.
 - 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 Alaska or Hawaii or in a foreign country is also prorated between personal and business, where the personal amount will not be reimbursed.
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 reimbursable to the traveler. Justification for cancellation should be attached to the Concur expense report.

5.10 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 not reimbursable by SLAC.

5.11 Miscellaneous Travel Expenses

1. Miscellaneous costs - Miscellaneous costs that are allowable and essential to the purpose of the authorized travel should be submitted for reimbursement on the same Concur expense report as the other travel expenses.
2. Insurance - Insurance costs covering life, baggage, flights, and personal automobile are not reimbursed by SLAC.
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. It is highly recommended that the traveler request a SLAC provided cell phone with an international plan for foreign travel from Travel@SLAC. 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.

5.12 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 should issue a Visitor Invitation Letter approving sponsored guests to travel on behalf of SLAC that should provide a specific description of travel expenses to be reimbursed, travel expenses to be direct billed to SLAC (if any), business dates of travel, and limitations on amounts to be claimed. SLAC is not obligated to reimburse sponsored guests for travel costs if expenses are incurred prior to the date of the signed invitation letter.
 - A. 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.

2. Foreign Sponsored Guests - Foreign sponsored guests seeking approved travel reimbursements from SLAC or for whom SLAC directly pays for travel expenses, should register at the [SLAC International Services Office \(ISO\)](#) to complete check-in procedures during their visit.
 - A. [Travel@SLAC](#) cannot proceed with reimbursement of travel expenses until the sponsored guest / visitor has checked in with ISO. The following documents are required during check-in:
 - B. a) Passport; b) I-94 card; and c) [appropriate visa documents](#).
3. 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 who will be reimbursed for lodging (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.
4. 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).

5.13 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.

5.14 Student Travel Expenses

1. Students may be reimbursed for SLAC related business travel whether or not they are employees. In most cases, such reimbursements are not tax-reportable to the Internal Revenue Service as income to the student, provided documentation is available showing that the travel was for official SLAC business.
2. Refer to the [Stanford Administrative Guide Memo 5.4.2 section 3.b.13](#) for more details on Student Travel and Tax related information.

5.15 Remote Worker Travel Expenses

1. SLAC follows the [Stanford Administrative Guide Chapter 2, Subchapter 1, Policy 2.1.20](#) to define staff telecommuting and remote working.
2. Employees classified as remote workers by SLAC HR are eligible to receive reimbursement for travel to SLAC.
3. Employees classified as telecommuters by SLAC HR are not eligible to receive reimbursement for travel to SLAC.

5.16 Recordkeeping and Reimbursement

1. Expense Report Preparation - The traveler is required to prepare an expense report in Concur to account for all travel costs reimbursed by SLAC.
 - A. The completed expense report should be submitted within 10 working days after returning from each trip.
 - B. If out of pocket expenses are not submitted within 60 days of the traveler returning from their trip, justification is required in Concur and may be subject to tax reporting under IRS rules.
2. The Concur expense report 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.
 - D. The expense report is submitted in Concur and should be preceded by an approved pre-trip request.
3. 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 claiming reimbursement

- 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.
4. 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 for reimbursement.
 - 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 has completed processing and the expense report has been paid.
5. 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.
6. 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 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 for reimbursement.

7. 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.
 - A. 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 for reimbursement, 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 reimbursement 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 a reimbursement can be processed.

5.17 Travel Reimbursement Approval Thresholds

1. The following thresholds for approvals apply for reimbursing travelers for trips:
 - 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.
 - C. Travel over \$6,000 - Approval by Controller
 - D. Additional approvals are required in the following instances:

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

6.0 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. If the untimely submission and approval of travel vouchers occurs, then the Department may be in violation of the Prompt Payment Act and the traveler would be in violation of the Federal Travel

Regulation. This may also result in an improper payment or an untimely de-obligation of funds consistent with the travel controls (i.e., greater than 6 months old).

7.0 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, Staff Telecommuting and Remote Working](#)
- [Stanford University Administrative Guide Memo 8.4.2, Vehicle Use](#)
- [Internal Revenue Service Mileage Rates](#)
- [General Services Administration \(GSA\), Per Diem Rates](#)
- [Federal Travel Regulation Chapters 300 to 304](#)
- [Stanford Anti-Bribery Guide](#)
- [Cellular Phone Request International Travel Form](#)

Associated Documents:

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

8.0 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.

I-94 Card: Form I-94, the Arrival –Departure Record Card, is a form used by U.S. Customs and Boarder 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 I-797A approval notice for a Form I-129 petition for an alien worker or a form I-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.

9.0 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.

10.0 SYSTEMS, APPLICATIONS and WEBSITES

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

11.0 TOOLS

- [Egencia](#)
- [Concur](#)
- [ISOS Travel Tracker, My Trips](#)
- [Per Diem Rates Look-Up](#)
- [U.S. Department of State travel website](#)
- [Concur Quick Start Guides](#)