

Professional Development & Travel Guidelines

Due to the pandemic, all university-sponsored travel is suspended until further notice. After this notice, the university will re-consider the permissibility of travel on a limited basis. Please ask Jing Jing before you're planning to travel. For updated travel policies, please visit the [Health Alerts](#) site.

Business travel expenses should be necessary, allowable, and reasonable. When you plan and request approval for business travel, you should consider all aspects of the total trip to achieve the most cost-conscious result. Use the Travel Card (TCard) for travel-related business transactions, including airfare, lodging, and car rental only through Stanford approved travel agents, such as Egencia, Casto and United Corporate Direct. Submit your receipts to Jing Jing when you return the Travel Card. The Travel Card cannot be used for any personal expenses. Misuse of the card can result in disciplinary action, up to and including termination of employment.

Conference/Workshop Registration

During the pandemic, if you want to register for your workshop, training program or conference, please contact Jing Jing for the Travel Credit Card. For security reasons, she will tell you the credit card information over the phone, not by email or through SLACK. Use the travel card, not the purchasing card, to register for any workshop, training program or conference. When you sign up for a conference/workshop, always use your \$800 STAP fund for the registration first, then your professional development fund if you don't have sufficient STAP funds. It takes time for the central office to process your STAP funds; therefore, keep track of all your registration fees personally. Don't count on the online STAP balance because it is not updated promptly. We highly recommend that you use the Excel Budget Tracker [here](#) and Travel Expense form [here](#) to help you plan your professional development fund accordingly.

Membership

When you apply to become a member of a job-related professional organization or when you renew your existing membership, the membership fee must come from your professional development fund, not the operating budget. Even though the fee is part of your professional development, you should use our Purchasing Card, not Travel Card. Please keep this in mind.

Air Travel

As a result of the COVID-19 pandemic, reimbursement for travel will only occur when it is booked with the travel agents available through Stanford Travel. The travel agents are Egencia, Casto and United Corporate Direct. The agent Egencia via [flight search](#) with your SUNet ID and password is the most popular. Trips booked through Stanford Travel are automatically registered

with the university. This allows the university to contact you in the event of a major emergency or changing circumstances related to your travel destination. Air tickets can only be booked for Stanford-related business, not for personal purposes. However, you are welcome to book personal hotel stays and car rentals on Egencia to take advantage of Stanford-negotiated hotel and car rental rates. If you do decide to take advantage of these negotiated prices, please use your personal credit card.

All staff traveling on business are expected to travel at the lowest available airfare (coach/economy class). In general, the most effective way to get lower fares is to book as early as possible. Ancillary fees, such as baggage, in-flight meals, and Wi-Fi service should be incurred responsibly and should not be excessive. Usually the least expensive air tickets are non-refundable. If for some reason you need to switch your flight, a change fee around \$200 will be charged by the airlines. You will usually have one year from the purchase date to apply the cancelled ticket to the same airline.

When you combine your business trip with a personal trip, you need to submit an airfare quote for your actual conference-date travel. If the cost happens to be higher than your preferred airfare (both business & personal), you don't need to pay. However, if it is lower, then you need to pay the difference. Unfortunately, verbal confirmation of price difference doesn't work. Documentation is required by the University Auditing Officers.

Private Car

Driving in lieu of flying cannot exceed the cost of airfare plus ground transportation. Generally for travel in excess of 200 miles, air travel is the most economical and practical way. BEAM will reimburse you for travel by private car based on the actual driving distance by the most direct route, not more than 105% of the mileage listed on Google Maps. For the mileage reimbursement rate, please refer to the following link [mileage rates](#). In addition to the mileage, necessary and reasonable charges for parking and tolls can be reimbursed; however, traffic tickets and parking ticket fines will not be reimbursed. Expenses for mileage may be calculated from the traveler's home when travel occurs during weekends, holidays, or outside normal business hours. Whenever the trip does not involve a business stop at Stanford, and the distance from home is less than the distance from Stanford, mileage expenses must be calculated from home.

Car Rental

BEAM will pay the traveler for the cost of renting a compact or standard size car if use of the rental vehicle is the most economical mode of transportation. In order to use the most economical means for travel, before renting a car, you should consider shuttle services. Any fuel, tolls, and parking expenses for your car rental can be reimbursed. Prorated cost of car rental during personal days must be deducted from reimbursable expenses. Make sure you include

“Stanford University” with your name on the rental agreement whenever possible. Car rental insurance is not reimbursable for travel within the continental United States because it is covered by the University except when renting in Hawaii or a foreign country.

Meals & Lodging

There are four methods for reimbursement of expenses incurred and you may use one of the four methods for reimbursement. The method selected must be used for the entire trip.

1. Actual expenses for lodging and meals
2. Actual lodging expenses plus per diem for meals
3. Per diem lodging plus actual expenses for meals
4. Per diem for lodging and meals

Travelers are expected to use lodging that is necessary and reasonable, selecting the lowest standard room rate available. Before travel, take a look at the per diem rates at <http://www.gsa.gov/portal/content/104877> which will provide you with some guidelines on how much you can spend. For lodging and meals, if your actual expense is higher than the per diem rate, except for the hotel designated by the conference, we cannot reimburse what you have actually spent. BEAM does not pay for expenses during additional personal days.

When meals are provided as part of a conference or included in a hotel rate, a deduction must be made from the applicable per diem rate. Tips for meals cannot exceed 20% of the cost. Alcohol expenses should always be highlighted on the receipt and separated from regular meal expenses.

Local travel is defined as less than 50 miles one way from Stanford. Meals and lodging are not reimbursable for one-day travel when you attend a conference in San Francisco; however, mileage will be reimbursed. The way to calculate your mileage usually is the distance from Stanford to your conference site if there is a stop at Stanford. If the mileage between your residence and the conference site is longer than that of between Stanford and the conference, and if you go straight from home to the conference, you cannot ask to be reimbursed for the extra mileage.

During Travel

1. Collect all receipts from your incurred travel expenses or use a smartphone to take an image of all receipts and email them to Jing Jing.
2. Save conference agenda and note whether the conference provided any meals.
3. Mark any alcoholic item on your receipt if you have any; otherwise, write “No Alcohol” on meal receipts.

Reimbursement procedures

1. Fill out the Travel Expense form [here](#).
2. Submit all travel receipts along with your completed Travel Expense form to Jing Jing no later than 10 working days from completion of travel.
3. Include a copy of your conference agenda.
4. Report to the IRS as taxable income to the traveler if expenses reported 60 days or more after completion of travel.

In short, in order to be reimbursed, your business travel expenses incurred should be necessary, allowable, and reasonable. We will continue to rely on your efforts to apply cost saving methods wherever possible!