

## MCP Guidelines for Travel and Business Meals

**Purpose:** This document is to help guide your decisions for traveling and business meals. Stanford requires reimbursements and travel to be relevant to your research and *will only reimburse the relevant portions*. We want everyone to be able to receive a full reimbursement. Talk to your admin if you have any questions. ***If you do not comply with Department, University, and Federal guidelines, Stanford will not reimburse you.***

**It is your responsibility to provide clear documentation and complete explanations to your admin – your admin cannot start your reimbursement until they have all relevant information.**

# Traveling for MCP

## Before You Go

Provide the following information to your admin via email (you are no longer required to provide a Student Certification form):

**Who:** Name of person traveling

**What:** Name of conference/event attending

**Where:** Location of the conference/event

**When:** Dates of your trip

**Why:** An explanation of how this trip benefits your research work at Stanford

**How:** Tell us how this trip will be funded (Fellowship? Travel Grant? Your Faculty has agreed to fund?)

What You Need to Think About *Before* Booking Travel

- Communicate with your PI:** You must have your PI's approval for travel, and there must be a funding source identified before you make any reservations.
- Communicate with your administrator:** Let your administrator know as soon as you start planning your travel. Your administrator knows the ins and outs of the travel process and can help you plan your travel to ensure you get reimbursed.
- Combining work & leisure:** Keep in mind that *you will only be reimbursed for the work portion of your travel*. **If you lengthen your travel or fly in and out of different locations for non-work reasons, you will need to show a “comparison flight”**—see Scenario 1 and 2.
- When booking flights, follow these guidelines:**
  1. You **must** book your travel using one of the following resources:
    - Stanford Travel
    - Casto Travel for complex foreign itineraries; or
    - United Corporate Direct

You can access these travel booking resources here:

[http://web.stanford.edu/group/fms/fingate/staff/travel/stanford\\_travel.html](http://web.stanford.edu/group/fms/fingate/staff/travel/stanford_travel.html)

*If you do not book your travel using one of these options, you will not be reimbursed.*

2. Book economy flights. Economy Plus is reimbursable, but needs to be cleared by your PI.

3. Try to pick the closest airport.
  4. Flight insurance is not reimbursable.
  5. Fly America Act: When a federal grant (e.g. NIH) is funding your travel, you must fly with an American carrier, exceptions: countries in the EU, Norway, Iceland, Switzerland, Australia and Japan.
- Car rental insurance:** Stanford provides auto-insurance for car rentals in the US (except Hawaii). Write “**Stanford University**” on the rental agreement. *Additional rental insurance is not reimbursable.* Choose the most economically practical vehicle for your trip (e.g., no four-wheel drive SUVs for city driving).
  - Meals:** Meals have to be reasonable, tips no more than 20% (unless mandatory for large group). Meals must be no more than \$75 total per day (international travel: less than \$125 total per day). *Itemized receipts are required. Alcohol will not be reimbursed for travel meals.*
  - Ground Transportation:** Uber, Lyft, or BART/train are the preferred methods of transportation to and from SFO, San Jose, or other local airports.

**Please read the example scenarios below:**

**Scenario 1:** If you attend a conference from April 5-10 and then decide to visit family from April 10-15, you will need to provide comparison flights. You will need to provide the roundtrip ticket cost for April 5-10 (the work portion of the trip) in addition to the April 5-15 roundtrip (includes the leisure portion of the trip). *You will only be reimbursed for the roundtrip economy class ticket for the work portion of your trip.* For example: If the total ticket for April 5-15 is \$250 and the April 5-10 comparison flight price is \$150, you will only be reimbursed the \$150. **You must print the comparison flight image at the same time you book your tickets and provide it to your admin.**

**Scenario 2:** If you are attending a conference in Barcelona from April 5-10, but you decide to fly in and out of Madrid because you want to visit family, you will need to provide comparison flights for both airport locations. Please Note: You will only be reimbursed up to the cost of the roundtrip ticket to Barcelona, because that is where the conference is taking place and is the closest airport to the conference.

## While Traveling

Remember to get receipts for all charges and **itemized** receipts for meals. These are the receipts that show what you ordered. Pictures of receipts are acceptable.

*Business meals can happen while traveling:* A business meal is a meal shared by 2 or more people where the meal has a Stanford business purpose (for example, a discussion of research collaboration). To be reimbursed for these meals you will need to provide a list of the attendees and their affiliations and a description of the business purpose of the meal. See Business Meal section below for further information.

## Upon Return

Provide all info and documentation in a packet or email to your admin **within 2 weeks of your return**. Your admin has 60 days to have your travel reimbursement approved. Any expenses not submitted within 60 days will be considered personal income for the purchaser, and therefore, subject to income taxation. These rules apply to personal credit cards, as well as Stanford Travel Card holders.

### Documents required for reimbursement:

- Conference Agenda (abridged version is OK) and/or website link. *If your conference provides food, you will not be reimbursed for purchased meals.* If you presented at the conference, please mark where on the program your talk appears.

- Abstract (if you submitted one and spoke at the conference)
- Itemized list of items to be reimbursed
- Itemized/detailed** receipts:
  - Conference Registration
  - Abstract submission, if applicable
  - Lodging
  - Airfare & other transportation
  - Meals: Remember meals must be reasonable, and less than \$75 per day (\$125 per day if it is a foreign trip). Alcohol with travel meals will *not* be reimbursed by your PI.

## Business meals

A business meal is a meal between 2 or more people which has a Stanford business purpose. Examples include taking a postdoc candidate out for lunch or meeting with a colleague from another institution during a meal to discuss research collaboration.

Requirements for reimbursement and/or Pcard use:

- Must be approved by your PI
- Provide a business purpose explanation: Was this a meal to discuss research collaboration? Lunch for a candidate? Tell us.
- Provide a list of all meal attendees by name, including their affiliation.
- Provide an itemized receipt.
- Do not exceed totals of: \$20/\$35/\$50 per person for breakfast/lunch/dinner.* Alcohol will *not* be reimbursed by your PI in most cases, check with your PI for approval. (In special circumstances, such as meeting with a collaborator, AND with approval from the faculty member, dinner can reach the maximum of \$80/person for the full meal.)

### Additional Information and Resources

- **Stanford Travel website access:**  
[https://web.stanford.edu/group/fms/fingate/staff/travel/stanford\\_travel.html](https://web.stanford.edu/group/fms/fingate/staff/travel/stanford_travel.html)
- If you are carrying Stanford owned equipment (includes laptops and computers) out of the United States, fill out the Annual or One Time **Temporary Export/Reexport form**.  
<https://web.stanford.edu/group/export/forms/TMP-annual.html>
- **Fly America Act:**  
[http://web.stanford.edu/group/fms/fingate/staff/travel/policy\\_notes/fly\\_america\\_act.html](http://web.stanford.edu/group/fms/fingate/staff/travel/policy_notes/fly_america_act.html)
- **Postdoc Travel:** <http://postdocs.stanford.edu/handbook/travel.html>  
And <https://adminguide.stanford.edu/chapter-5/subchapter-4/policy-5-4-2>
- **Tutorial can be found on Axxess:** Traveling for Stanford FIN-0400