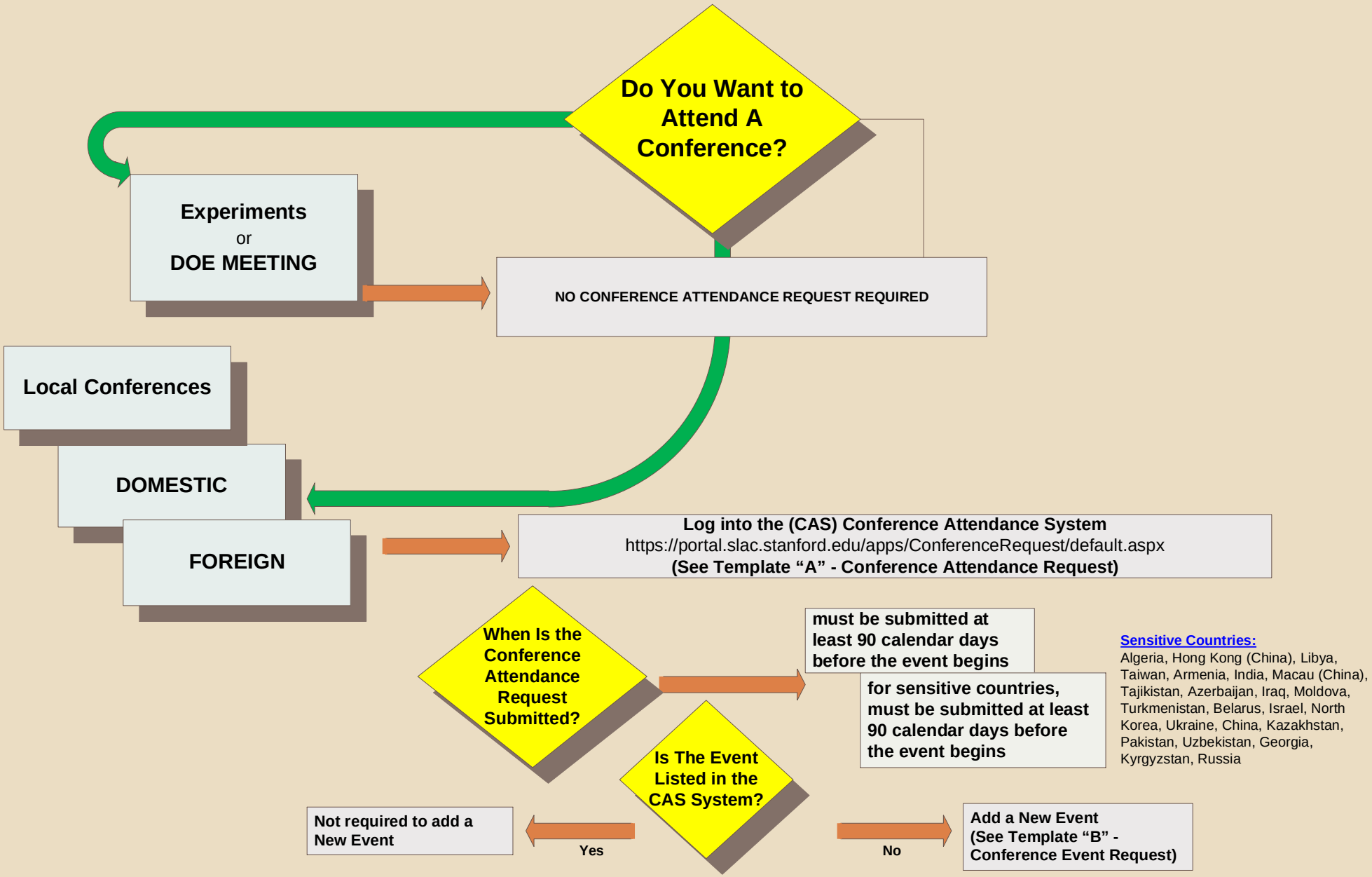
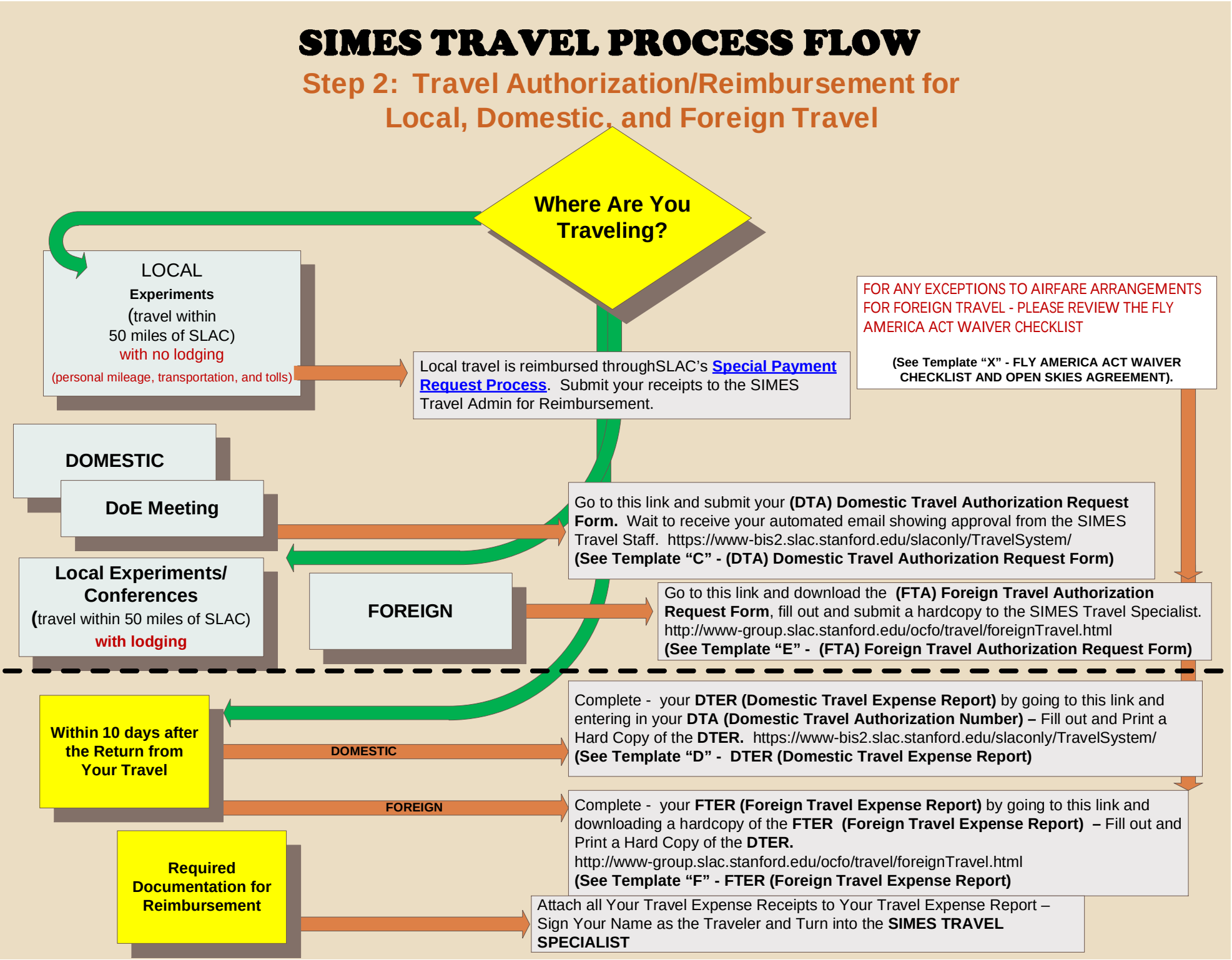
SIMES TRAVEL PROCESS FLOW

Step 1: Conference Attendance



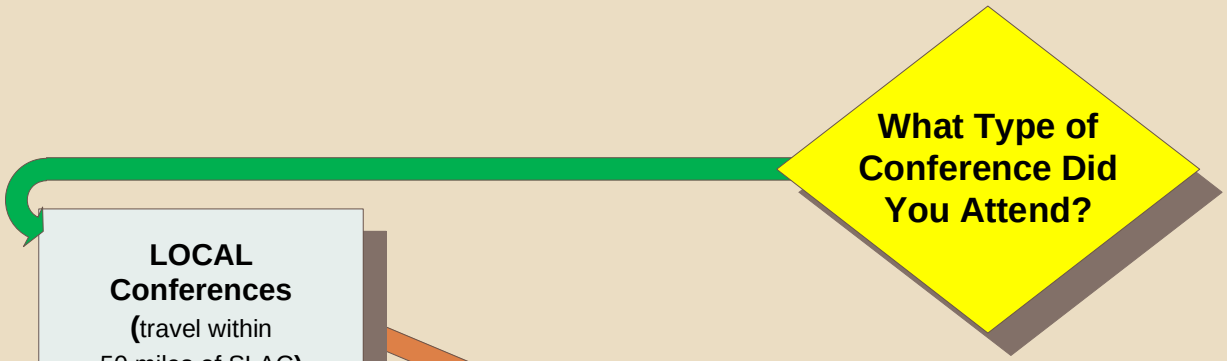
SIMES TRAVEL PROCESS FLOW

Step 2: Travel Authorization/Reimbursement for Local, Domestic, and Foreign Travel



SIMES TRAVEL PROCESS FLOW

Step 3: Conference Registration Reimbursement



LOCAL Conferences (travel within 50 miles of SLAC)

DOMESTIC

FOREIGN

For Conference Reimbursement Registration Fees – Go to the following link and fill out the Conference Reimbursement Online Form and Print.
https://www-bis2.slac.stanford.edu//slaconly/training/ECInfo.aspx?Quicklink=Reimburse
(See Template "G" - Conference Reimbursement Registration Form)

Required Documentation for Reimbursement

After Printing the Conference Reimbursement Form turn it in with a copy or your Credit Card Receipt showing payment method (last four-digits of your Credit Card#) and a Flyer of what is included in the Registration in to the **SIMES TRAVEL SPECIALIST.**

Detailed SLAC Travel Information

ATTENTION: If you are accessing this document within SLAC's internal network, the links will open when clicked. If you are not on SLAC's network, some of the links won't work unless you use either Citrix or VPN to connect to the network. If you don't have a Citrix/VPN account, and wish to open one, send an email to Lorraine Struthers, lstruthe@slac.stanford.edu.

INTRODUCTION

Traveling for business at SLAC involves many rules due to our DoE funding restrictions. What follows is an overview of these rules. Refer to the Travel Office website for more information, advice and tips on traveling. Feel free to contact Lorraine Struthers, lstruthe@slac.stanford.edu, if you have questions.

NOTE: All travel authorizations, travel expense reports, and conference approval and reimbursement forms that utilize SIMES account numbers are to be routed through Lorraine Struthers for validation, and approved by Maggie Leung (DTAs only) or Business Manager, Nancy Matlin (all other forms).

It is SLAC policy for travelers not to incur any expenses until they have been fully approved for the conference (if applicable) and the travel. (This is for their protection in case they are not approved. It is acceptable to make reservations that can be canceled without penalty.)

TRAVEL AUTHORIZATIONS

All domestic and foreign travel must be pre-approved. If travel involves a conference, separate conference approval is required. Per diem rates for Lodging and Meals & Incidental Expenses (M&IE) for both domestic and foreign locations are available on the Travel Office website.

Domestic:

The Domestic Travel Authorization (DTA) form is an online form. It gets routed online to the appropriate persons for approval. You will be notified via email as it progresses through the approval process.

Foreign:

The Foreign Travel Authorization (FTA) form is a Word document that you should save locally and complete. Include lstruthe@slac.stanford.edu as your travel administrator's email. Print, sign, and bring/mail/email to Lorraine Struthers. Foreign travel requires 90 days pre-approval; there's no distinction between sensitive and non-sensitive countries.

Conference:

The Conference Approval System (CAS) is an online system. It gets routed online to the appropriate persons for approval. You will be notified via email as it progresses through the approval process. Conferences are defined as a "meeting, seminar, retreat, symposium, or similar event that involves official travel" and requires 90 days pre-approval. If it's a DOE-sponsored, or Experiments, it does not require pre-approval.

NOTE: If your home department is not SIMES, but you are using a SIMES account number for the conference expenses, select SIMES Research as the Home Department, and indicate your actual home department in a comments field.

Local:

Local Travel does require pre-approvals– A Conference Attendance Request is required. Local Travel is defined as travel within 50 miles of SLAC (e.g., LLNL, LBNL, San Francisco). Only transportation costs are reimbursed, not lodging or per diem (meals), unless those expenses are authorized by your PI. Local travel that involves lodging/per diem costs needs a signed memo from the PI and a DTA (see above).

TRAVEL ARRANGEMENTS

Once your travel has been approved, you should make your travel arrangements (flight, lodging, etc.). Retain all receipts from your trip (except meals, if you are using per diem) because you will need them for your expense report when you return. Although receipts are not required for expenses under $75 (exception: airfare, lodging, car rental MUST include receipts), it is preferred to provide the receipts for all dollar amounts.

Receipts to save:

1. Conference Registration Fee: must show the fee has been paid.
2. Airfare: airline itinerary, receipts for airfare, boarding passes.

(TIP: print 2 copies of boarding pass, if one is taken from you when you board.)

3. Hotel: itemized hotel receipt (folio). If you share a room with others, please pay separately and obtain the receipt for your own payment portion.
4. Ground transportation: taxis, shuttles, train, bus. If using a personal car to get to the airport, include the mileage to/from your home/SLAC to the airport (whichever is less).
5. Car Rental: receipts for car rental, gas, parking, etc.

Travel will be reimbursed at the lowest available airfare on coach class ticketed with a U.S. carrier's flight number, to the extent that such service is available.

Car rental should be for a compact car. Stanford University carries insurance coverage for travelers; no additional car insurance will be reimbursed (unless in Hawaii or a foreign country). GPS units are reimbursable (explanation required, e.g., "Needed for help navigating in unfamiliar city").

Lodging and M&IE should stay within per diem rates approved on the Travel Authorization.

For foreign travel, can either provide currency conversion rates using +/- 3% interbank rate and first day of travel as conversion date, or copy of credit card statement (all but last 4 digits of account number crossed out) showing actual amount paid.

If travel includes any personal days, must print airfare comparison showing flights for business days only.

See the Travel Office website for full details.

TRAVEL REIMBURSEMENTS

An expense report should be submitted within 10 business days after travel is completed. There are tax implications if your expense report is submitted after 60 days, unless extenuating circumstances exist. Electronic signatures and receipts are acceptable if legible. If travel plans changed after submitting travel authorization (e.g., switched from flying to driving, added rental car), or if expenses increased by greater than 25% from estimates on travel authorization, need to provide written explanation and submit with expense report. Needs approval from Business Manager (Nancy Matlin).

Domestic:

The Domestic Travel Expense Report (DTER) is accessed through the DTA which was filled out previously. It is filled out online but is not approved online. Print, sign, and bring/mail/email to Lorraine Struthers with the original/electronic receipts.

NOTE: Airfare reimbursement can be submitted as soon as the expense is incurred; it is not necessary to wait until after the travel is completed. To do so, submit a DTER with a note in the "Additional Comments" field that it is for pre-payment of airfare. After the travel is completed, edit the DTER to include the balance of expenses and subtract the pre-paid airfare as a "Cost Adjustment".

Foreign:
The Foreign Travel Expense Report (FTER) is an Excel spreadsheet that you should save locally and complete. Print, sign, and bring/ mail/email to Lorraine Struthers with the original/electronic receipts.

NOTE: Airfare reimbursement can be submitted as soon as the expense is incurred; it is not necessary to wait until after the travel is completed. To do so, submit a FTER with a comment in the "Notes" field that it is for pre-payment of airfare. After the travel is completed, revise the FTER adding the balance of expenses and noting the airfare was pre-paid.

Conference Registration:
The Conference Registration fee (as well as the registration fee for non-conference events) gets reimbursed using the SLAC Training system, not through the Travel Reimbursement Office on a DTER or FTER. STAP Funds may be used by regular staff employees for conference registration, with approval. Print the online form, and bring/mail/email to Lorraine Struthers. Make certain you include the required documents listed at the bottom of the form (webpage printouts showing a breakdown of what was included in the registration, and a course/conference description). Select Nancy Matlin as the only approver (unless your PI has access to the online form and has requested that he/she also approves).

NOTE: Conference Registration Fees can be submitted for reimbursement immediately after the expense is incurred; it is not necessary to wait until after attending the event.

Local:
Local travel is reimbursed through the Special Payment Request in Peoplesoft and is approved online.
If you do not have access to PeopleSoft, bring/mail/email your receipt along with the backup docu-mentation to support the charge, to Lorraine Struthers who will submit it for you (e.g., for mileage, include a web printout showing distance traveled). Local Travel is defined as travel within 50 miles of SLAC.

Helpful Hints when Submitting Reimbursements:
1. *Receipts should be taped to an 8½ x 11 piece of paper to help ensure they don't get misplaced.*
2. *Documents should be single-sided to aid the processing.*

TRAVEL REIMBURSEMENTS FOR FOREIGN VISITORS
Foreign visitors that are requesting reimbursement from DoE need to go to the International Services Office (ISO) at SLAC when they arrive, regardless of their length of stay. Please contact Lorraine Struthers for more details on travel reimbursements for visitors.

REFERENCED URLS:
Conference Approval System (CAS) – https://portal.slac.stanford.edu/apps/ConferenceRequest/default.aspx
Conference registration fee – https://www-bis1.slac.stanford.edu/slaconly/training/ECInfo.aspx? Quicklink=Reimburse
Currency conversion rates – http://www.oanda.com/currency/converter/
Domestic Travel Authorization (DTA) & Domestic Travel Expense Report (DTER) – https://www-bis2.slac.stanford.edu/slaconly/TravelSystem/default.aspx
Foreign Travel Authorization (FTA) & Foreign Travel Expense Report (FTER) – http://www-group.slac.stanford.edu/ocfo/travel/forms.html
Per diem rates – http://www-group.slac.stanford.edu/ocfo/travel/perDiem.html
Special Payment Request – https://psoft-fsys.slac.stanford.edu/psp/FSYS/EMPLOYEE/ERP/c/SL_AP_CUSTOM.SL_SP_RQST_CMP.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPCO_ACCOUNTS_PAYABLE.SL_SP_RQST_FOLDER.SL_SP_RQST_CMP_GBL&IsFolder=false&IgnoreParamTempl=FolderPath%2cIsFolder
Travel agencies – http://www-group.slac.stanford.edu/ocfo/travel/reservation.html
Travel Office – http://www-group.slac.stanford.edu/ocfo/travel/default.htm

Approval Routings and Links for SIMES Conference and Travel Forms

Introduction:
The following describes the approval routings for SIMES Conference and Travel forms, and provides links to those forms.

Conference Forms:
CAS (Conference Approval System) requesting attendance is done online through
Conference Approval System
DCC (Departmental Conference Coordinator) validate: Lorraine Struthers
WBS (Work Breakdown Structure – financial) approver: Nancy Matlin

Conference Registration Fee reimbursement is done online through HR-Training
Approver: Nancy Matlin

Travel Forms:
DTA (Domestic Travel Authorization) is done online through Domestic Travel System
Approver: Maggie Leung
Cc'd: Nancy Matlin and Lorraine Struthers
Editor: Nancy Matlin and Lorraine Struthers

DTER (Domestic Travel Expense Report) is done online through Domestic Travel System
(but printed and submitted for approval)
Reviewer: Lorraine Struthers
Approver: Nancy Matlin

FTA (Foreign Travel Authorization) is Word document available on Travel Office website, Forms
Reviewer: Lorraine Struthers
Approver: Nancy Matlin

FTER (Foreign Travel Expense Report) is Excel document available on Travel Office website, Forms
Reviewer: Lorraine Struthers
Approver: Nancy Matlin

Referenced URLs:
Conference Approval System (CAS) – https://portal.slac.stanford.edu/apps/ConferenceRequest/default.aspx
Conference registration fee – https://www-bis1.slac.stanford.edu/slaconly/training/ECInfo.aspx? Quicklink=Reimburse
Domestic Travel Authorization (DTA) & Domestic Travel Expense Report (DTER) –
https://www-bis2.slac.stanford.edu/slaconly/TravelSystem/default.aspx
Foreign Travel Authorization (FTA) & Foreign Travel Expense Report (FTER) –
http://www-group.slac.stanford.edu/ocfo/travel/forms.html