Travel Policy

I. PURPOSE: To define the policy, guidelines and procedures for PAVIR funding of travel and travel related expenses.

II. POLICY: Funds provided to and accepted by PAVIR may be used to fund travel expenses associated with furthering or facilitating appropriate Veterans Affairs Palo Alto Health Care System (VAPAHCS) research or education activities.

III. GUIDELINES: Following are guidelines and requirements for PAVIR funding of travel:

1. **Acceptable Travel** – Examples of acceptable travel activities include, but are not limited to, the following:
    1. Attendance at meetings of professional societies or groups, the recognized or stated primary goals of which are to further medical knowledge, research, education, or public health;
    2. Collaboration with scientific colleagues or experts for discussing research plans or projects, reviewing data, or learning new techniques;
    3. Meeting with individuals or business entities for furthering the interests of PAVIR or VAPAHCS research or education;
    4. Interviewing prospective employees.
2. **Relevance** – The traveler must submit adequate information or documentation to justify a primary research, education, or business purpose for the travel. For travel funded from a sponsored award the travel must be allowable by the sponsor.
3. **Acknowledgement of Institutional Affiliation** – PAVIR was established to facilitate VA research and education. Therefore, implicit in the commitment of funding for travel is the expectation that the traveler's VA affiliation be identified appropriately in conference brochures, attendee rosters, identification badges or published meeting materials.
4. **Leave Status** – VA-paid employees traveling on PAVIR funds should normally be on VA travel status or authorized absence (including Stanford-funded sabbatical leave) to receive reimbursement for travel expenses. Where appropriate, PAVIR will reimburse for expenses incurred related to business travel during an approved leave. VA-paid employees are strongly encouraged to seek guidance from their supervisor on applicable VA travel rules and regulations. If the leave for personal reasons is combined with VA travel or authorized absence, PAVIR will not pay lodging, car rental or per diem for expenses incurred during the personal annual leave portion of the travel.
5. **Prior Approval of Travel** – PAVIR does not require that travel be approved prior to occurrence. However, if there is any question as to what an allowable expense is, or whether the expense is budgeted, the traveler should contact their assigned Contract & Grant Analyst (CGA) to discuss PAVIR's policies related to travel. VAPAHCS imposes special requirements for foreign travel for VA-paid employees. VA-paid employees are responsible for complying with these requirements.
6. No expenditure for travel expenses for companions will be authorized, except in unusual circumstances, e.g., recruitment-related travel.
7. **Local Travel** – Local travel is travel within a 45-mile radius of VAPAHCS. Mileage reimbursement for such travel will be paid as described in the section entitled "Use of Private Automobile." Per diem allowances for breakfast and dinner do not apply to local travel. Expenses incurred in association with local travel, e.g., a meal at a seminar or meeting, may be permissible. In such cases, receipts are required, and the meeting or seminar must be a full day's duration.
8. **Transportation** – All travel must utilize the most commonly accepted mode of transportation over the most usually traveled route. If, for personal convenience or preference, an indirect route is traveled or travel by a direct route is interrupted, any resulting expense will be borne by the traveler. Additionally, any resulting excess travel time must be charged to the appropriate leave.
9. **Air Travel** – Coach shall be used. The exceptions for use of upgraded service are medical necessity or an itinerary of more than 8 hours duration and involving international travel. Typically, this means booking a business class ticket. Only when business class or a comparable travel class is not available is first class travel allowable. The traveler is responsible for providing proof or other written justification that business class wasn't available to use at the time of booking first class tickets. Exceptions require approval of the Chief Executive Officer. Except in approved circumstances, airline reservations must be made at least seven days in advance of travel to secure the most advantageous rate. In compliance with government requirements, travel funded by government grants or contracts must use U.S. airlines to the maximum extent possible. This requirement must not be influenced by factors of cost, convenience or personal travel preference. If arranging a Saturday stay can substantially reduce the total travel cost, PAVIR will reimburse the traveler for Saturday night lodging and per diem. Contemporaneous comparison of cost at the time the ticket was purchased must be included with the reimbursement request. PAVIR will not reimburse the traveler for the use of upgrade certificates, or memberships in airline flight clubs. The cost of flight insurance or canceling and rebooking flights may be allowable if such cost was necessary for legitimate business reasons, illness or other compelling circumstances. The traveler is responsible for canceling reservations that will not be used. Charges or forfeited refunds from failure to cancel in a timely manner will not be reimbursed.
10. **Use of Private Automobile** – Reimbursement for use of a private automobile will be made at the prevailing federal mileage reimbursement rate plus applicable tolls and reasonable parking.

1. PAVIR will not pay for an individual's Stanford parking permits unless there is a direct relationship to a project.
2. Employees are required to transport themselves from their residence to work and return at their own expense.
3. When an employee uses their private automobile to travel to an alternate work location, they may be reimbursed for local travel when the distance to the alternate site exceeds the distance between their residence and their primary work location.
    1. If the primary work location is the employees' residence, reimbursable mileage is calculated as the distance between their residence and the alternate location.
4. Reimbursement for use of a private automobile will not exceed the allowable cost that would have been incurred had travel been by air. For calculating the equivalent airfare to replace more expensive mileage charges, the coach fare plus ground transportation costs are applicable. Equivalent airfare is coach class, seven day advance purchase. Distance will be calculated based on mileage indicated on commonly used internet map sites. Because such reimbursement is for the expense of automobile use, mileage reimbursement shall be made to only one of two or more persons traveling together in the automobile. The traveler must have liability coverage for the automobile; the minimum prescribed coverage is $15,000 for personal injury or death of one person, $30,000 for injury or death of two or more persons in one accident, and $5,000 for property damage. Only with explicit written authorization may patients or subjects ever be transported by private conveyance.

11. **Ground Transportation** – Ground transportation reimbursement covers travel to and from the departure city and the destination city where the business conferences or meetings are held. Documentation of the location and business purpose of the conferences or meetings are required. Excessive transportation costs will not be reimbursed if the traveler elected to forego reasonable means of transportation.
12. **Rental Cars** – Rental cars can be used when such rental is justified and documented in the reimbursement request. Unreasonable car rental cost will be denied. When renting a car on a business travel, the traveler must elect to take insurance offered by the rental car company. Legible receipts for gasoline purchased for use in rental cars must be included if that is claimed as reimbursement.
13. **Hotel/Accommodation Charges** – Travelers will be reimbursed for reasonable standard hotel room costs as determined by the meeting site and prevailing hotel rates. Reimbursement will be made for reasonable laundry and dry-cleaning costs if the hotel stay exceeds five nights. No reimbursement will be made for expenses incurred if the traveler elects to stay with friends or relatives.
14. **Per Diem/Maximum Expenses** – A traveler may elect to accept per diem reimbursement for Meals and Incidental Expenses (M&IE) without a requirement for receipts. The per diem rate for domestic travel will be established at the current U.S. General Services Administration (GSA) per diem rate for the destination city. The per diem rate for foreign travel will be that set by the U.S. State Department. Per diem for the first and last day of the trip is reimbursed at 75% of the M&IE rate applicable for the city visited. It is the traveler's responsibility to deduct partial per diem if participating in meals provided by a conference. See the Meals and Incidental Expense breakdown at the GSA website. Alternatively, a traveler may elect to claim actual expense reimbursement with detailed receipts if less than per diem. Receipts are required for such claims.
15. **Baggage** – Baggage includes both the traveler’s personal property and any VA or PAVIR property. Excess baggage charges may be allowed if justified by an explanation of the circumstances and provision of a legible receipt for such charges.
16. **Phone Charges** – Business related long-distance telephone calls are permitted but should be kept to a minimum. Charges for computer connections for purposes of reading e-mail are also permitted but should be used judiciously. Personal long-distance telephone calls are usually limited to one per day and should be reasonable. Excessive connection charges will not be reimbursed.
17. **Foreign Visas** – The cost of obtaining a foreign visa for entry into a country to attend a meeting is permissible and may be reimbursed.
18. **Society and Professional Meetings Convened in San Francisco** – Travel between VAPAHCS and San Francisco is generally subject to Local Travel rules, as described in section Q above. However, in cases where bona fide society or professional meetings are held in San Francisco and extended daily stays longer than eight work hours or overnight stays are necessary, funding for hotel, per diem, parking and other related charges may be reimbursable.
19. **Foreign Travel** – Foreign travel is defined as travel to any destination outside the United States. See section H above regarding use of U.S. airlines if funded by government sources. Additional requirements pertain to foreign travel for VA-paid employees. VA-paid employees are responsible for complying with these requirements.
20. **Registration Fees** – Registration fees may be paid by PAVIR in advance of travel. This may be accomplished using a Check Request from the traveler for payment to the educational entity or to the traveler for fees paid.
21. **Legible Receipts** – Legible **itemized** invoices or receipts (not a credit card receipt) documenting proof of payment are required for each item for which the traveler requests reimbursement. The only exceptions from the need for itemized invoices or receipts are travel expenses following the published GSA per diem rates as well as ground transportation costs of $25 or less per leg.
22. Business meals and networking events are reimbursable to the extent that they are justifiable and comply with

the PAVIR Funding for Meals and Refreshments at Meetings policy.

IV. PURPOSE: To define the policy, guidelines and procedures for PAVIR funding of travel and travel related expenses.

1. Claims for reimbursement should be submitted within 10 days of completion of travel. The claim must be submitted using the Travel Reimbursement Request and be accompanied by required documentation, including legible itemized receipts, proof of payment and justification as discussed elsewhere in this policy. IRS regulations require that travelers adequately account for expenses within a reasonable period after the expenses were paid or incurred. PAVIR's policy defines 60 days from the incurrence of the expense as a reasonable time for submitting expense reimbursement. Claims submitted more than 60 days after travel is completed must include a completed Justification for Late Submission form and may be denied. Travel reimbursement requests submitted more than one year from the date of incurrence will be denied. If PAVIR accepts the traveler's justification for late submission and does not deny reimbursement, PAVIR must report the reimbursement as taxable income to the traveler unless a business justification that causes the delay in submission is provided. Therefore, it is critical that requests for travel reimbursement are submitted as expeditiously as possible.
2. Employees in positions classified as nonexempt under the Fair Labor Standards Act are eligible for compensation for the time they spend traveling. Nonexempt employees are required to fill in the Nonexempt Employee Travel Questionnaire form shortly after travel and submit it to the Payroll Department. Principal Investigators and their designated personnel should be aware of additional costs associated with travel of nonexempt employees. Prior approval by Contracts and Grants staff for nonexempt travel is recommended. Submit the completed Travel Reimbursement Request with:
    1. Legible itemized receipts described above;
    2. Documentation of the conference, meeting, or seminar – This may be in the form of a copy of a cover page of a brochure, a flyer, or print out of a web page showing the name, dates and location of the conference;
    3. Any applicable Justification for Late Submission or Nonexempt Employee Travel forms.
3. The request will be reviewed for allowability of costs. In determining reimbursement for these claims, a test of reasonableness will be applied. A check for approved expenses including an explanation for denied costs will be returned to the traveler.
4. Appeals of denied expenses or requests for exceptions to the PAVIR Travel Policy must be submitted via email to the Chief Executive Officer.