Chan Division of Occupational Science and Occupational Therapy
Travel and Professional Development Reimbursement Policy
Faculty, Staff, Post-docs
(Effective July 1, 2026— June 30, 2027)
(Revised 08/03/2026)

All employees must obtain written pre-approval for all business travel/activities. This includes travel requests for in-person activities as well as virtual attendance at conferences that requires time away from regular job duties, and/or necessitates reimbursement for allowable expenditures. Such activities must serve a university purpose that supports the employee's essential job functions and Division's priorities. All travel/activities must adhere to all university policies.

All requests must be submitted in advance (not after-the-fact) and may include activities such as faculty and post-doc scholarly presentations (as the primary presenter), staff official institutional business as designated by the Division, grant/contractual obligations and sponsor-mandated meetings. Pre-approval is also required for any externally funded travel/meetings for invited speaking roles or grant functions that are within the stated scope of work/budget. Essential professional development that aligns with Division's priorities particularly for early-career faculty, and cannot be deferred, will be considered case by case, as budget permits. Extended personal stays (e.g., extra night at hotel over a weekend before/after conference) must be clearly documented and cannot be reimbursed.

Examples of travel that are not likely to be approved from the Division's FY27 operating budget include unfunded or exploratory research collaborations, in-person attendance at a conference without a speaking role or formal assignment, in-person attendance when a virtual option is available, or self-selected professional development or continuing education travel that is not required for job duties or aligned with the Division's priorities. It is the responsibility of each employee traveling to follow university travel policies found at https://policy.usc.edu/travel-expenditures/ and the new university supplemental expenditures travel policy (https://policy.usc.edu/travel-expenditures-supplemental-policy/), which provide details regarding use of personal vehicles, international travel bans, hotel maximums ($400/night including all fees), air transportation (economy), and other expense restrictions or allowances.

When federal funds (e.g., NIH grants/contracts) are used for international travel, tickets must be purchased in compliance with the Fly America Act/Open Skies Agreement. This Act stipulates that tickets must be purchased for airline travel on a U.S. flag air carrier; or a foreign carrier that operates under a U.S. flag air carrier code-sharing agreement and tickets or documentation for electronic tickets identify the U.S. flag air carrier's designator code and flight number. Such carriers must be used unless the traveler can document such carriers were "unavailable," as availability is defined by federal regulations. Certification of unavailability must be on file in the Department of Contracts and Grants prior to purchase. Not all sponsors accept the Open Skies agreement; before booking any non-U.S. carriers, verify terms and conditions with the Department of Contracts and Grants. Please use the USC vendor (Christopherson Business Travel) and tell the agent that you will be using grant funds to cover the travel expense. If you use Concur booking, you should be able to see which flights are compliant with the policy. https://procurement.usc.edu/travel/plan-book/preferred-suppliers/

Please take time to review these policies thoroughly prior to requesting pre-approval, and before making your travel arrangements. Employees are responsible for the accuracy of all information, and submitting itemized receipts for all expenditures. Policy violation may result in denial of reimbursement.
**If you were approved for FY27 travel using an earlier version of this form, please submit your approved form/email correspondence, and a note indicating that you were approved prior to the new supplemental policy, along with your receipts for reimbursement in the Concur system.*

FUNDING ALLOWANCES FROM THE CHAN DIVISION FY27 OPERATING BUDGET:

- Full-time faculty (or full-time post-docs/staff engaged in research/scholarship as a core function) may request up to a maximum of **$4,000** (FY27 total) for conference travel funded by the Division, assuming they are the primary presenter on a poster, podium presentation, or keynote. If there are multiple speakers required on a workshop or panel, these will be reviewed case by case, and funding allowances may be adjusted based on availability of funds. Multiple poster presenters will not be funded – if the first author is not traveling, an alternate presenter may be

funded.
• Please submit receipts as quickly as possible after attending the conference/business event, and no later than 30 days post event. Reimbursements for conferences or travel that are approved in Concur/charged between July 1, 2026 and June 30, 2027, will count toward the FY27 $4,000 limit. Please note that submissions near the end of June may not be able to be processed until the next fiscal year, and will count toward funding allowance in FY27.
• Faculty with Division-sponsored research start-up funds, or externally-funded grants that allow conference travel are expected to use their respective sources of funding (relevant to the presentation/purpose of trip) prior to requesting Division operating funds. Use of grant or start-up funds may exceed $4,000 for the fiscal year, if complying with agency as well as university policies.
• For the current fiscal year, we are unlikely to be able to support conference travel for adjunct faculty, retired faculty, or any personnel working <80% effort, on 9- or 12-month appointments. Please discuss specific professional development needs that cannot be deferred with your supervisor/Associate Chair.
• Travel/conference allowances are dependent upon available funds; budgets and policies may change throughout the year. We encourage employees to seek additional funding from available grants and other sources.

As you fill out the request form, please be mindful of the Chan Division's FY27 limits for specific conferences as follows:

Conference	Location	Recommended Total Budget
OTAC	Pasadena, CA	$1,200
OTAC / Western Regional	TBD	$1,500
AOTA Annual Conference (INSPIRE)	Boston, MA	$3,200.00
ALC/FW Educator Meeting Add-On	Boston, MA	$700
SSO:USA	Portland, ME	$2,300
OT Summit of Scholars	St. Louis, MO	$1,200
AOTA Specialty – Adult Rehab	Virtual	$600
AOTA Specialty – Mental Health	Oak Brook, IL	$1,550
AOTA Specialty – Education Summit	Indianapolis, IN	$1,650
AOTA Specialty – Children & Youth	New Orleans, LA	$1,800
AOTA Specialty – Entrepreneurship	Virtual/TBD	$600
INSAR	Prague, Czech Republic	$4,000

CHAN DIVISION PRE-APPROVAL PROCESS, FORM AND ROUTING

In summary, **all** conference attendance (virtual or in-person) and **all** business travel requiring time away from the office and/or reimbursement or allowable expenditures, irrespective of funding source, **must be pre-approved**. Even if your travel is being paid by another entity (e.g., professional organization, another university, external grant), you must still **submit a travel pre-approval request form**, indicating your dates of absence and coverage, your sources of funding, and be mindful of required disclosures of conflict of interest or commitment (https://policy.usc.edu/conflict-of-interest-and-commitment/) and submit disclosures for outside funding/honoraria to the diSClose portal (https://disclose.usc.edu).

Please note that the FY27 Chan pre-approval request form (https://chan.usc.edu/resources/forms-and-documents) has been revised to provide a separate section for requests for grant-related activities (such as data collection off-site as conducted by the PI or team), in addition to the more general section for individual requestors traveling to a single conference or business meeting.

Please complete and submit the pre-approval request form via email to your supervisor/Associate Chair, at least 30 days prior to travel. Submissions after-the-fact will not be approved. All awards are subject to current funding availability and policies.

Once the supervisor/Associate Chair signs off on your time off/funding (estimated 1–2 weeks), they will route it to the Associate Dean and Chair's office (Dean's delegate) for final sign-off and processing. Once the Associate Dean signs off, a copy will be sent to the employee, the supervisor/Associate Chair, and Stephanie Lee, who manages reimbursements. It is the employee's responsibility to ensure they receive a copy of the signed form—if they did not, please email Stephanie Lee (stephanie.lee@chan.usc.edu).

All requests for all business travel/conference attendance will be reviewed case by case and funding recommendations made based on the available budgets. In general, allowable expenses include conference registration, transportation, and poster printing costs. For faculty traveling to conferences to present, up to **$100 per day** may be reimbursed for meal expenses when paid from the Division account, provided that **itemized receipts** are submitted. Meal expenses charged to grant funds may exceed this amount, as long as they comply with the university's food/meal policy. For staff working university events, existing reimbursement policies remain unchanged. All meal and related expenses require **itemized receipts**, and **per diem reimbursements are not permitted**. Chan does not process food or beverage reimbursements unless the staff member is traveling out of town to work at a mandatory university event (e.g., events coordinator working the AOTA booth and reception). All itemized receipts need to be submitted for reimbursement within 30 days of returning from the trip through USC Concur. IRS may tax any reimbursements that occur after 60 days (https://policy.usc.edu/reimbursements/). Per diem reimbursements are not permitted in the Chan Division/Ostrow School of Dentistry. All employees, regardless of status, **must retain and submit itemized receipts**. Please **include a copy of the notification** for speaking engagements/presentations, and/or itinerary for required meetings/grant-related activities (if no email notification).

- All requests must be made using the Chan Travel Support Request Form which will be found here: https://chan.usc.edu/resources/forms-and-documents
- All requests must be reviewed and signed off by the employee's designated supervisor/Associate Chair, and then the Associate Dean and Chair.

Routing Instructions:

- Employees primarily engaged in patient care should submit their requests to Dr. Chantelle Rice Collins.
- Employees primarily engaged in teaching, admissions, and fieldwork coordination should submit their requests to Dr. Julie McLaughlin Gray.
- Employees involved primarily in IT, Continuing Education, Global Initiatives, Marketing/ Communications, and Special Events should submit their requests to Dr. Sarah Bream.
- Employees primarily engaged in research should submit their requests to Dr. Mary Lawlor.
- Associate Chairs should submit their requests to Dr. Grace Baranek.
- Once approved by the supervisor/Associate Chair, route the form to the Associate Dean and Chair's office (cc: chair@chan/usc.edu and sonia.de.mesa@chan.usc.edu), as the Dean's designee, for final approvals/signatures.

Process for Submitting Travel Expenses

- Once you have written approval, you may book/pay for your travel costs upfront and submit your reimbursement within 30 days of your return from the conference. Please submit your itemized receipts through Concur at this link: https://chan.usc.edu/resources/forms-and-documents.
- If you do not have access to Concur, please contact Stephanie Lee at stephanie.lee@chan.usc.edu.

Updated August 3, 2026

Additional Considerations

- In determining which conferences to prioritize, personnel may consult with their supervisor/Associate Chair at their annual merit review meetings or professional development/mentoring meetings. Conference presentations should be linked to the employee's essential job functions and the Division's priorities.
- The same poster/paper/talk may not be circulated to multiple conferences. We encourage you to leverage presentations into a publication for greater knowledge mobilization.
- Approved funds must be used for the intended purpose, and cannot be transferred to another trip or purpose.
- Time off (number of work days vs. vacation days) is subject to any existing university, Division, or hospital policies as applicable. Personal travel days/hotel stays must be fully disclosed, and are not allowable.
- Guest business meals may be allowable in specific circumstances (e.g., recruitment/search committee, development/fundraising) and will be considered case by case, with prior approval.
- Local conferences (LA area) will be reimbursed for mileage to/from CHP (or home if closer to venue than CHP) and parking expenses, but not airfare from other locations.

Final reimbursements are overseen by our School's business office (Ostrow). Any policy violations are the responsibility of the employee. A copy of this policy and the related pre-approval request forms can be found here: https://chan.usc.edu/resources/forms-and-documents.
* The Associate Dean and Chair has the final discretion regarding availability and use of faculty travel funds. This policy and the allowable reimbursements will be re-evaluated annually based on available funds.
** All travel-related forms can be found here: https://chan.usc.edu/resources/forms-and-documents

In addition to the guidelines outlined above, all faculty, staff, and post-docs are required to adhere to the **University's Travel Expenditures Supplemental Policy** when planning and requesting reimbursement for business travel. **(** https://policy.usc.edu/travel-expenditures-supplemental-policy/ **).**

Supplemental Policy Details

Pre-Approval Requirement

All business travel and related activities must be **pre-approved in writing** by the traveler's **supervising Dean or designee, or Senior Vice President or designee** prior to incurring any expenses or booking travel. Pre-approval documentation must:

- Clearly state the business purpose
- Identify the funding source
- Be included with the reimbursement request

Travel without written pre-approval is not eligible for reimbursement.

Permitted Travel Activities

To be eligible for reimbursement, travel must serve a documented university purpose and meet one or more of the following criteria:

- **Required for grant or contract obligations,** including project meetings or sponsor- mandated presentations
- **Formal invited role** at a conference (e.g., speaker, presenter, panelist, moderator, conference organizer)
- **Official institutional business** as designated by the Dean or SVP (e.g., regulatory visits, student/student-athlete recruitment, development/fundraising)
- **Accreditation-related travel** or approved academic assignments
- **Externally funded** by a sponsor, grant, or donor gift explicitly supporting the travel
- **Essential early-career professional development** for junior faculty or staff, if aligned with unit priorities and with strong justification

Travel Activities Not Permitted

The following are **not eligible** for reimbursement using university funds:

- General attendance at conferences without an invited role or formal assignment (subject to above-noted exception for essential early-career professional development)
- Participation in conferences where **equivalent virtual alternatives** exist
- Unfunded or exploratory research collaboration travel
- Self-selected or optional professional development that can be reasonably deferred

Additional Guidance and Points of Emphasis

- **Extended personal stays** must be clearly documented; only the business portion will be reimbursed.
- **Mileage reimbursement** must reflect the starting point (office vs. home) based on weekday or weekend travel.
- **Travel class** is limited to coach; upgrades are not reimbursable unless pre-approved with documented business justification.
- **Hosting external visitors** is permissible with approval; must follow fiscal stewardship standards.