Travel Reimbursements Tips Sheet - Basic Travel Guidelines

- **Airfare**
  - Use Connexxus to purchase airfare – only strictly business itinerary can be charged to UC
  - Airfare type – economy class – book at least 14 days in advance to obtain best fares
  - Additional fees on flights, e.g. Upgrades, extra legroom, etc. are not allowed
  - If personal travel is combined with business a comparable airfare quote is required – least expensive is reimbursed

- **Paying for Others**
  - Generally not allowed except on supervised group trips or co-travelers sharing a room

- **Private Car Mileage**
  - Shortest distance for travel allowed
  - Driving instead of flying is allowed, however the cost cannot exceed the cost of airfare (comparable airfare quote – based on at least a 14 day advance purchase, non-refundable lower economy fare, on business dates of travel)
  - Note: In general, travel to Campus is considered commuting, and not reimbursable

- **Car Rentals**
  - You can rent up to an intermediate size car - additional insurance is not reimbursable on domestic rentals
  - UC contract agencies include insurance on domestic rentals: book with Hertz, National or Enterprise with UC Corp
    - Enterprise 1-800-261-7331   UCB ID: XZ23A01
    - Hertz 1-888-222-0286       UCB ID: 71864
    - National 1-800-227-7368    UCB ID: XZ23A01

- **Lodging: Domestic**
  - Lodging must be at least 40 miles from Campus or home whichever is closer in order to be reimbursed
  - Receipts must be itemized (room, tax, service, and any other charges listed separately)
  - Receipts must show payment received with zero balance
  - Bundled packages may not be reimbursable if charges are not itemized

- **Lodging: International**
  - Per diem limits apply for lodging - allowance is based on location and hours at the location
  - Full travel itineraries showing arrival and departure dates and times are required
  - If your estimated actual lodging expenses fall below maximum per diem allowance, request for adjustments
  - Receipts are required if requesting actual foreign lodging expenses

- **Meals and Incidentals (M&IE): Domestic**
  - Meals and incidentals are capped at $71 per person, per day; actual meal expenses only
  - Meals are not reimbursable for travel under 24 hours

- **Meals and Incidentals (M&IE): International**
  - Per diems are allowed and are based on the location and hours in each location
  - Conference and entertainment meals are deducted from allowance
  - If your estimated actual meal expenses fall below maximum per diem allowance, advise at time of request

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What to Submit for Travel Reimbursements:

- Business purpose for trip – state UC business, include dates and location(s)
- Back up - agenda for meeting, conference, name and affiliation of person with whom you met if informal meeting
- Flight itinerary showing proof of payment, even if booked on Connexxus
- Flight itinerary should show the date and arrival and departure time for each location
- Changes and/or cancellations to Itinerary - provided brief explanation
- Personal combined with business? State when, and where, provide comparable airfare quote
- Receipts are required for all expenses $75.00 or higher (except for M&IE, or Lodging if guesting per diem for foreign travel)
- Credit card statements cannot be substituted for receipts, but may be submitted in addition to show proof of payment
- Car rental receipts showing payment in full
- Zero-balance, itemized hotel bill (unless claiming per diem for foreign travel)
- Signature of traveler is required with certification statement
- Approver’s signature should also be on the request form
- Non-Us Citizens or Non-Permanent Residents who are UC guests need to submit additional paperwork
Travel Reimbursements Tips Sheet - *Basic Entertainment Guidelines*

- **Payee**
  - Reimbursements can only be to UC employees or UC students

- **Business Purpose and Back-up**
  - Provide business reason for entertainment or meal expense
  - Submit backup such as an agenda, announcements, flyers, if available

- **Type of Event**
  - Some expenses require additional approval. Examples are when spouses, partners, families attended; employee morale events; when cost per person exceeded the maximum per-person expenditure

- **Frequency of business meetings**
  - Meals provided to employees should be infrequent and limited to no more than once a month

- **Maximum per person limits for meals:**
  - Breakfast $26
  - Lunch $45
  - Dinner $78
  - Light refreshments $18

- **Cost per person**
  - This includes all food items purchased for the entertainment meal, even if purchased separately through other means (e.g. purchased in BearBuy, on Event Planner Card, or by other individuals, etc.)
  - The cost of labor, sales tax, delivery charges, and other service fees must also be included with food and beverages in the per-person rate calculation
  - Brunch may be calculated using the lunch rate. If a reception before a meal includes beverages and hors d’oeuvres, the cost for the reception and the meal should be treated as a single event

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**What to Submit for Entertainment Reimbursements:**

- Business Purpose – state business reason for the meal expense
- Back-up – submit whenever available- e.g. Meeting agenda, announcement of event, email invitation
- Indicate type of entertainment
- Indicate type of meal
- Indicate if alcohol was served
- Calculate cost per person
- Guest List - provide names and affiliation
- Note if event needs additional approval (spouses attended, morale, etc.)
- Submit receipts – itemized receipts required if $75.00 or more per occasion
- Signature of payee is required with certification statement
- Signature of host is required if other than payee
- Additional signature may be required if expense is exceptional