

July 6, 2007

VICE CHANCELLOR RESEARCH UNITS

SUBJECT: Office of Research Affairs Travel Guidelines

The Office of Research Affairs has established the following departmental guidelines to supplement the University Travel Policy located at:

<http://www.ucop.edu/ucophome/policies/bfb/g28.html>

Units may choose to issue more restrictive guidelines than the ones listed below.

University employees traveling on official business shall observe normally accepted standards of propriety in the type and manner of expenses they incur. It is the traveler's responsibility to report his or her actual travel expenses in a responsible and ethical manner.

Preauthorization: All official University travel shall be properly preauthorized on the electronic TravelLink system. Under no circumstances shall expenses for personal travel be charged to, or be temporarily funded by, the University. When requesting preauthorization, the purpose for the travel or the nature of the business benefit derived as a result of the travel should be mentioned. When a University employee travels under the sponsorship of a non-University entity, travel expenses, including advances, prepayments, or billings, shall not be charged to a University account or billed to the University; in particular, airline tickets must be obtained from the sponsor. Only preauthorized travel should be charged to the UCSD Travel Card, since airfare charged is automatically paid by UCSD (strip-billing).

If you want to prepay any expenses besides airfare in advance of the planned travel, then it is advisable to request a check through the "Prepay Hotel, Registration Fees, or Service Fees" tab rather than using your Travel Card, since that may cause late fees to be charged to you. Book air travel at least 14 days in advance of the trip in order to receive reduced fares. Use your best judgment about whether the ticket should be refundable in order to keep airfare costs low.

Reporting & Reconciliation: Travel expenses should be reconciled within 21 days of the end of the trip. When any personal leave is taken while on official travel status, the number of personal days must be specified either on the Travel Event Voucher (TEV) or on the electronic MyTravel system.

Original receipts are required for reimbursement. Please retain and submit airfare receipts (for electronic tickets, an itinerary is acceptable, as long as the itemized cost is listed), boarding passes, lodging, registration fees, rental cars and itemized meal receipts. Alcohol is unallowable on Federal and 19900 funds.

A package that includes airfare and other travel expenses, such as hotel and/or rental car is only eligible for reimbursement if the receipt or itinerary specifies the cost of each item. Additional car rental insurance should not be purchased since it is provided by the University and will not be reimbursed. Each person must pay for his/her own expenses. Please do not charge your meal, hotel or any other expenses on somebody else's credit card. You will not be reimbursed for any expenses other than your own. When traveling abroad, the University provides per diem to cover lodging and meal expenses. Claim per diem only when your lodging and meal expenses exceed University-established per diem.

Meals and Incidental (M&I) Expenses: For travel lasting less than 12 hours this is not a reimbursable expense. For travel lasting longer than 12 hours but less than 30 days, only the actual amount spent should be claimed, up to the maximum permitted. As of October 1, 2006, that amount is \$42 for travel lasting from 12-24 hours, or \$64 for 1-29 days.

Thank you for your attention to this matter.



Arthur B. Ellis
Vice Chancellor for Research