

## **Travel (DOMESTIC – CONUS) – Policy Summary**

The following information has been provided from the Policy Governing Travel (G-28). Please use this as guide to help submit a travel reimbursement.

### **Roles & Responsibilities:**

- **Traveler** – It is the traveler’s responsibility to report the actual travel expenses in a responsible and ethical manner, in accordance with the regulations set forth in the G-28 Bulletin. The reimbursement should be submitted within 45 days\* of the last day of the trip.
- **Administrative** – It is the admin’s responsibility to submit in accordance with the regulations set forth in the G-28 Bulletin. Legible and appropriate documents **MUST** be provided.
- **Approver** – The authority to approve travel expense reports **MUST** be documented by a signature authorization form on file with the Campus Controller’s Office or by an electronic signature authorization.

### **Approval:**

- Travel expense incurred in attending conventions, conferences or business meetings are allowed when approved by the employee’s department head or other appropriate authority.

### **Receipts/Other supporting documents:**

- Itemized receipts are required for all airline, lodging, car rental, parking, meals, and extraordinary items.
- Extraordinary items, such as valet parking, **MUST** be supported by appropriate justification.
- For registration fees, please provide a receipt and a form of payment.
- Please provide a conference agenda/brochure/itinerary with the location, date, and conference title.

### **Travel expenses incurred will be reimbursed according to the following policies:**

#### **1. Lodging**

- A traveler **MUST** be more than 40 miles from headquarters or home, whichever is closer, before overnight lodging may be expensed.
- Lodging cap of \$275 nightly room rate excluding taxes of less than 30 days (see G-28 policy for more info.)
- Lodging expense **MUST** be supported by original itemized receipt. Total daily hotel expense (room charge plus room tax) should be listed daily and not combined into one charge for the entire stay.
- Mandatory charges imposed by a hotel, such as valet parking or a “resort fee,” should be explained on the travel reimbursement request.
- When a traveler lodges with a friend or relative while on official business for the University, a non-cash gift, such as flowers, groceries, or a restaurant meal, may be provided to the host. The actual cost of such a gift may be reimbursed up to USD \$75; a receipt **MUST** be provided.

#### **2. Meal & Incidental Expenses (M&IE):**

- For Continental United States (CONUS) travel of more than 24 hours, the reimbursement of M&IE is based on actual costs incurred, subject to daily maximum reimbursement limit of \$79. **Note:** This is the daily limit for meals eaten alone, not business meeting and entertainment. Alcohol expenses are unallowable and should not be treated as a per diem.
- When the entire length of a trip is less than 24 hours, M&IE shall not be reimbursed unless the travel includes an “overnight stay” as supported by a lodging receipt.
- Meal related to business meetings and entertainment is allowed while on travel status. The business purpose should be noted on the reimbursement. The per-person limits for meeting and entertainment:

- Breakfast – \$31.00
- Lunch – \$54.00
- Dinner – \$94.00
- Light refreshment– \$22.00
- Note: meal rates include labor, sales tax, delivery charges, and other service fees
- Buffet reception cannot exceed the applicable meal rate associated with the type of buffet. Brunch is equal to lunch rate.

### 3. **Rental Cars:**

- A vehicle may be rented when renting would be more advantageous to the University than other means of commercial transportation, such as a taxi. The traveler is responsible for obtaining the best available rate.
- Travelers are expected to use rental agencies with which the University has system wide contracts that include insurance coverage.
- Additional charges for insurance coverage will not be reimbursed if a non-contract agency is used unless no car rental company in the area has such agreement with the University.

### **Private Automobile:**

- As of July 1, 2022, the reimbursement rate for mileage is 62.5 cents. This rate takes into account all actual automobile expenses such as fuel and lubrication, towing charges, repairs, replacements, tires, depreciation, insurance, etc. Therefore, such expenses shall not be allowed for reimbursement when a private vehicle is used.
- When two or more persons on University business share a private vehicle, only the driver may claim reimbursement for mileage
- When private vehicles are used on University business, the appropriate campus officials are responsible for requiring that employees have adequate liability insurance coverage. Please see G-28, for more insurance coverage.

### 4. **Air Travel**

- Coach class or any discounted fare shall be used.
- **Business Class** services may be authorized only under the below circumstances and **MUST** be provided with documentation with the reimbursement report:
  - To reasonably accommodate a disability (medical note required), \_\_\_\_\_
  - When the traveler is 6'3" or above (make a note in the report),
  - Non-coach seating is the only service offered between two points (screenshot required at time of booking),
  - The use of coach class would be more expensive or time consuming (screenshot required at time of booking),
  - An itinerary involves overnight travel without an opportunity for normal rest before the commencement of working hours (itinerary required).
  - **First Class** may only be purchased when it is the only additional class offered above economy and supporting documentation **MUST** be provided (screenshot required at time of booking).

### 5. **Parking**

- Reasonable charges for necessary parking while on University business will be allowed for the following:
  - Dayparking on trips away from an employee's headquarters.
  - Day and overnight parking on trips away from an employee's headquarters and residence (a claim should not be made if free overnight parking is available).
  - Travelers should seek out longer term parking at airports for travel that exceeds 24 hours
- Valet parking charges in excess of normal parking charges shall be borne by the traveler unless the traveler obtains an exception.

### 6. **Taxis**

- Taxi fare, including tip, shall be allowed when the use of alternative transportation is impractical or unavailable. The cost **MUST** be reasonable in relation to personal car use costs, including parking, tolls, etc.

**Insurance:**

- All University employees are covered worldwide, 24 hours a day, for a wide variety of accidents and incidents while on official travel status. The coverage includes accidental death, accidental dismemberment, paralysis, and permanent total disability. Employees using other booking methods for out of state and foreign travel MUST register their travel plans prior to departure. For more information, please refer to G-28.

**Other important travel policy information:**

- Travel that involves indirect itineraries or is otherwise interrupted for personal reasons MUST have a cost comparison performed at the time of booking (submitted with the expense reimbursement) based upon what UC would have paid for the business portion of the trip.

**Contacts:**

- If you have further questions, please submit a ticket to Supply Chain Management (SCM) Response Team at <https://supplychain.ucsf.edu/>

**\*Expense reports MUST be submitted within 45 days from the end of a trip.**