

**UNIVERSITY OF CALIFORNIA ACADEMIC SENATE
TRAVEL POLICIES AND REIMBURSEMENT PROCEDURES:**

REIMBURSEMENTS

The Systemwide Academic Senate will reimburse travel expenses for UCOC-approved Senate members attending Universitywide Academic Senate Committee meetings. Travelers are responsible for making their own travel arrangements. These Procedures provide step-by-step instructions for submitting claims for reimbursement, along with reference to the policies that govern what will and will not be approved. **Important: Keep all receipts. File your Travel Reimbursement Form within 21 days.** A convenient summary of the UCOP travel policy (Business and Finance Bulletin G-28) is available at <http://policy.ucop.edu/doc/3420365/BFB-G-28>.

Submitting Reimbursement Claims

UC travel policy requires that all Travel Reimbursement Form (TRFs) must be submitted within 21 days after completing a Senate-approved business trip. UCOP policy is not to reimburse TRFs received more than 21 days after the trip. Original receipts are required to document all expenses submitted for reimbursement. The only exceptions are station-to-station BART and local bus trips. Payment will be issued directly to the traveler. UC Accounting cannot make payments to credit card accounts.

Note for UCLA Faculty: In addition to the steps below, UCLA faculty are required to log on to the UCLA Express System (<https://i4w.ais.ucla.edu/ils/login.aspx?izAppID=edu.ucla.travel.expressplus>) to review and submit claims after the Systemwide Senate Office has input them into the system.

Note for Student Representatives: The Senate office does not handle reimbursements for student representatives. Students claiming travel expenses should contact UCOP Student Academic Services, at (510) 987-9210.

Process:

1. Download the Senate [Travel Reimbursement Form](#) (TRF) form.
2. Sign your TRF.
3. Complete the TRF, including all of the following:
 - i. Business Purpose of the trip (e.g., name of the committee meeting), date, and location.
 - ii. Your complete mailing address.
 - iii. Receipts (required for airfare if not booked through UCLA Travel, rental car expenses,
 - iv. Original airfare receipt or ticketless confirmation statement and amount paid. Method and proof of payment (e.g., credit card receipt) must be included. For trips booked through UC Travel Center, submit only the e-receipt.

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- v. For mileage, provide the round number of miles.¹
- vi. For rental cars, provide the original receipt. No insurance or upgrade fees will be reimbursed.²
- vii. For trains and shuttles, provide original receipt or ticket stub. Taxis do not need receipts.
- viii. For preapproved lodging, provide the original hotel bill, showing zero balance.³
- ix. For meals, provide original itemized receipts. No charges for alcoholic beverages will be reimbursed.⁴

4. Stipulations

- i. Include the original airfare receipt and amount paid. Method and proof of payment MUST also be included;
- ii. Provide a round number (no decimal) if you are claiming mileage;
- iii. Provide all rental car expenses;
- iv. Include the original car rental receipt (No insurance or upgrade fee will be reimbursed)²;
- v. M&IE and miscellaneous expenses of \$75 or more;
- vi. Gifts provided to a host costing \$25 or more;
- vii. All itemized lodging expenses for domestic travel;
- viii. Include the original hotel bill if claiming lodging³ that was pre-approved. Bill must show zero balance;
- ix. Include the original itemized meal receipts⁴. Alcoholic beverages CANNOT be reimbursed;
- x. Sign the Travel Reimbursement Form certifying that the amounts claimed are a true statement of the expenses incurred on official University business and that the original of all required receipts has been submitted. The Travel Reimbursement Form or electronic equivalent must be approved for payment by the traveler's department head or by a person to whom the Chancellor has delegated such authority.

5. Please scan your receipts, and send them, along with the [travel reimbursement form](#), by email to brctravelandent@ucop.edu.

¹ The current standard mileage reimbursement rate for using your Personal Car is 54.0 cents per mile (<http://policy.ucop.edu/doc/3420365/BFB-G-28>).

² When using these agencies do NOT sign for insurance coverage since UC already has coverage. (For more information about insurance and liability: <http://www.ucop.edu/purchserv/travelinfo.html>.) In addition, do NOT sign up for an upgrade. Charges incurred for an upgrade will NOT be reimbursed per UC policy.

³ For one-day meetings, lodging is only allowable if approved in advance by the Executive Director (Martha.Winnacker@ucop.edu) and certain conditions are met.

⁴ Travelers are NOT eligible for meal reimbursement if the trip is 24 hours or less. Itemized receipt is required, and NO alcohol is allowed to be reimbursed.

6. For paper receipts, forward the signed [travel reimbursement form](#) and your original receipts to:

**Business Resource Center – Travel & Entertainment
University of California, Office of the President
1111 Franklin Street, 9th Floor
Oakland, CA 94607**

Account/Fund Number: M-430384-69085-03

ADDITIONAL NOTES:

For Senate Committee Members and Approved Travelers:

1. The Office of the President (UCOP) requires that travelers who are to be reimbursed by the Senate Office must use SWABIZ or the UCLA Travel Service to book flight reservations. UCLA Travel Service is preapproved only for travelers to or from Santa Barbara. These reservations have been fare negotiated with certain carriers, and reservations are transferable and/or refundable to the PAC in the event of meeting cancellation. There are no out-of-pocket costs to the traveler.
2. If airfare is not purchased through SWABIZ or UCLA Travel, the Senate will reimburse State fare airfare purchased 14 days in advance of a meeting, or published airfare lower than the State fare. Exceptions will be made for alternates who did not receive sufficient advanced notification.
3. Only coach airfare will be reimbursed. If a medical condition necessitates first class, please submit a letter from the traveler's doctor prior to any travel for an exception to the Executive Director (hilary.baxter@ucop.edu).
4. No out-of-state travel will be reimbursed without prior approval by the Executive Director (hilary.baxter@ucop.edu).
5. Travelers who choose not to use SWABIZ or UCLA Travel to make flight reservations and pay for the flights themselves will only be reimbursed up to the cost of the corresponding State fare (e.g., those purchased through SWABIZ or UCLA Travel. The Senate Office will NOT reimburse these tickets if meetings or flights are cancelled. (Travelers purchase their own tickets at their own risk.)
6. If you will be traveling multiple times during the year, it may be helpful to establish a traveler profile. Travel Profiles are now being created online through the [Connexus Portal](#). Simply log on to the Connexus Portal and click on the "Edit Profile" link at the bottom right side and then on "Update Contact Info". Once in the profile form, fill in all the blanks. This allows the Travel Center to make your travel arrangements without having to ask for your personal information each time you travel and it makes it easier for us to locate you if you need assistance while on travel.)

Surface Transportation:

1. Reimbursement for surface transportation is not to exceed airfare when air travel is available.
2. The current standard mileage reimbursement rate for using your Personal Car is \$.56 per mile (<http://policy.ucop.edu/doc/3420365/BFB-G-28>). If you choose to use a Campus Fleet Car, the Senate will not assume responsibility for any liability or damage. Please note that some campuses have designated parking areas for Campus Fleet Cars. Unless you park in those areas you must obtain a parking permit to avoid a parking violation ticket.
3. Connexus offers several options for booking rental cars, train travel, etc.
4. For trains, shuttles and taxis: Keep original receipts or ticket stubs for train travel. Receipts are not required for BART, local buses, and taxis.
5. Parking: Report parking expenses on reimbursement form; receipts for are not needed.

Lodging:

1. For one-day meetings, lodging is only allowable if approved in advance by the Executive Director (hilary.baxter@ucop.edu) and if one of the following conditions is met:
 - If the traveler is on travel status prior to 6:00 a.m. or after 10:00 p.m.;
 - For health-related reasons;
 - Traveler will attend another Senate approved function the day before or the day immediately following the meeting or another non-senate functions if the other party will share the cost.
2. For two-day meetings, one night's lodging is automatically approved for members on travel status.
3. If approved, lodging is not to exceed \$180 per night (excluding taxes). Please request the UC/state government rate if available and obtain a statement from the hotel that shows a zero balance.

Meals:

1. A morning snack, lunch, and afternoon snack are provided at most meetings.
2. Travelers are not eligible for meal reimbursement if the trip is less than 24 hours. If the trip lasts more than 24 hours, the travelers will be reimbursed the ACTUAL COST OF THE MEAL as indicated on an original ITEMIZED receipt, subject to the maximum set by UCOP travel policy [BFB G-28](#).
3. Alcoholic beverages will not be reimbursed.

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4. Reimbursement requests that include meals for other individuals are considered an entertainment cost and such costs are not reimbursable without prior approval from the Executive Director (hilary.baxter@ucop.edu).

Combined Travel:

1. When completing a travel voucher for combined travel expenses, the Senate office will reimburse only those expenses relating to Senate business.