

TRAVEL POLICIES AND REIMBURSEMENT PROCEDURES REIMBURSEMENTS

The systemwide Academic Senate will reimburse travel expenses for 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 UC policies that govern what will and will not be approved. **Important: Keep all receipts. We strongly recommend filing your Travel Reimbursement Form within 14 days of completing your travel.** A convenient summary of the UC Office of the President (UCOP) travel policy (Business and Finance Bulletin G-28) is available at: <https://policy.ucop.edu/doc/3420365/BFB-G-28>.

Submitting Reimbursement Claims

UC travel policy requires travelers to submit the Travel Reimbursement Form (TRF) within 45 days after completing a Senate-approved business trip. UCOP policy is not to reimburse TRFs received more than 45 days after the trip. Original receipts are required to document all expenses of \$75 or more. UC Accounting cannot make payments to credit card accounts.

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

Process:

1. Download the Senate [Travel Reimbursement Form](#) (TRF).
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 where your reimbursement will be sent.
 - iii. Receipts (required for airfare if not booked through UCLA Travel)
 - 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.
 - 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.

¹ The current standard mileage reimbursement rate for using your personal vehicle is 65.5 cents per mile (<https://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/central-travel-management/resources/travel-insurance--regulations/uc-car-rental-insurance-information.html>. In addition, do not sign up for an upgrade. Charges incurred for an upgrade will not be reimbursed per UC policy.

- viii. For pre-approved lodging, provide the original hotel bill with payment information, showing zero balance.
 - ix. For meals, provide original itemized receipts. No charges for alcoholic beverages will be reimbursed.³
 - 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 TRF 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.
4. Please scan your receipts, and send them, along with the [Travel Reimbursement Form](#), by email to academicsenate@ucop.edu.

ADDITIONAL NOTES:For Senate Committee Members and Approved Travelers:

1. UCOP requires that travelers who are to be reimbursed by the Senate Office must use SWABIZ or the UCLA Travel Services to book flight reservations. UCLA Travel Services is pre-approved only for travelers to or from Santa Barbara. These fare reservations have been negotiated with certain carriers, and reservations are transferable and/or refundable to the 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 Services, the Senate will reimburse State airfare purchased 14 days in advance of a meeting or published airfare lower than the State fare. Exceptions will be made for committee meeting attendee alternates who did not receive sufficient advance notification to plan for travel.
3. Only economy airfare will be reimbursed. If a medical condition necessitates first class, please contact your committee analyst to request approval from the Senate Executive Director. Please include a letter from the traveler's doctor prior to any travel to request an exception to policy.
4. No out-of-state travel will be reimbursed without prior approval by the Senate Executive Director (monica.lin@ucop.edu).
5. Travelers who choose not to use SWABIZ or UCLA Travel Services 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 purchasing their own tickets in this manner do so at their own risk.
6. If you expect to travel for Senate business 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 Connexus and click on the "Edit Profile" link at the bottom right side

³Travelers 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.

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 vehicle is 67.0 cents per mile (<https://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 if under \$75.
5. Parking: Report parking expenses on reimbursement form; receipts are not needed if under \$75.

Lodging:

1. For travelers at all campuses except UCB and UCSF, we are happy to accommodate one night of lodging the night before the meeting. Those who need an additional oversight stay should contact your committee analyst for pre-approval per our guidelines.
2. Lodging is not to exceed \$333 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 light breakfast, 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 (see [BFB G-28](#)).
3. Alcoholic beverages will not be reimbursed.
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 Senate Executive Director (monica.lin@ucop.edu).

Combined Travel:

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