

UCLA

David Geffen School of Medicine

Travel Reimbursement Guidelines

Department of Emergency Medicine

5/29/2024

Executive Summary

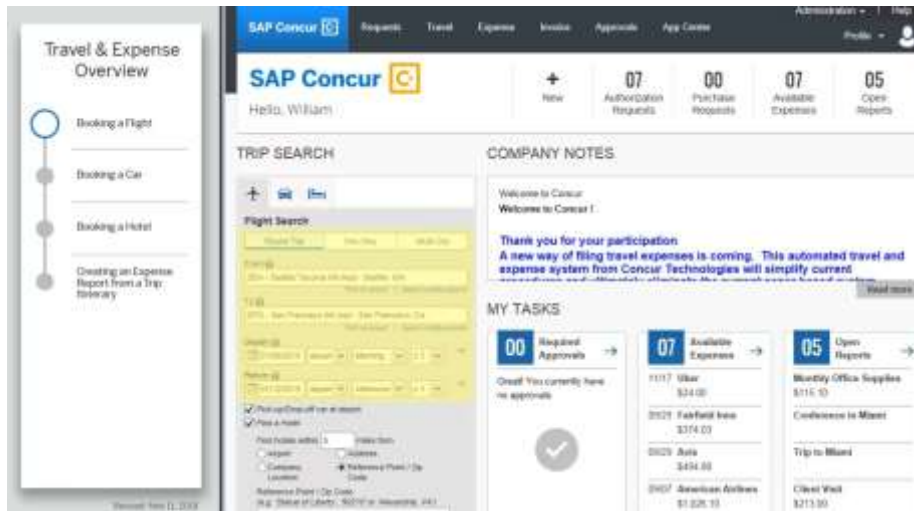
- **Airfare:**
 - Economy/Coach class - lowest fare – any seat upgrades will not be reimbursed*
 - International flight – contact Business Office to coordinate your airfare through Concur
 - Refrain from using 3rd Party Travel sites (ie: Booking.com, Priceline, etc.), they do not provide itemized details required by Travel Acct
- **Car Rental:**
 - Up to an intermediate-size (standard) vehicles reimbursed at UCLA discounted rates, see car rental slide
- **Lodging:**
 - The total amount can be reimbursed if it is at the conference hotel's **documented standard conference room rate**
 - CONUS: Up to \$275/night if it's not the conference hotel
 - OCONUS: Hawaii/Alaska/Foreign Travel - The nightly rate depends on the location. IE. Honolulu avg \$177/night
 - If the hotel conference is fully booked, the next closest lodging can be reimbursed at the conference rate
 - Must provide documentation that the hotel conference is completely booked
 - Lodging will not be reimbursed if the lodging site/hotel is **within a 40-mile radius of the traveler's residence or office**
 - Refrain from using 3rd Party Travel sites (ie: Booking.com, Priceline, etc.), they do not provide itemized details required by Travel Acct
- **Meal Reimbursement:**
 - CONUS: Up to \$79/day for the individual traveler only; not a per diem
 - OCONUS: Depends on the location (Hawaii/Alaska/Foreign Travel)
 - Meals for single-day travel (<24 hours) will not be reimbursed unless the travel includes an overnight stay
 - We will reimburse meals for trips that are within the 40-mile radius but are longer than 24 hours (not a single day trip)
 - As outlined in UC Policy G-28: Each employee must seek reimbursement for their own portion of the meal. Paying on behalf of someone else is a non-reimbursable expense
- **Ground Transportation:** See Ground Transportation Slides
 - Mileage is only reimbursed using your personal vehicle (.67 cents per mile – Beginning 01/01/2024)
 - Uber for UC – Partnership with UC provides benefits to Priority Pick-Up and Business Comfort
 - Other Uber/Lyft upgrades are not reimbursable unless with business justification (e.g. Uber Black, Uber Comfort, Lyft Black, Lyft Extra Comfort, etc)
 - We will reimburse mileage for trips that are within the 40-mile radius but are longer than 24 hours (not a single day trip)
 - Fuel reimbursement is only for university-owned vehicle or rental car
 - Personal vehicles require the minimum liability coverage prescribed by UC Policy G-28

Note: All reimbursement will be based on Travel Accounting's approval

Executive Summary

- **Others:**
 - As outlined in UC Policy G-28: Each employee must seek reimbursement for their own travel expenses. Paying on behalf of someone else is a non-reimbursable expense
 - Tipping can't exceed 20%
 - Alcohol can't exceed 50% of the total meal reimbursement requested
 - Reward points/Travel Credit are not reimbursable.
- **One-Time Exception Policy:**
 - We will provide a one-time exception to reimburse expenses without an itemized receipt
 - We will provide a one-time exception for taking Lyft/Uber upgrades.
 - Subjected to Travel Accounting's approval
- **IRS Compliance:**
 - **45 Days to Submit Reimbursement to Travel Accounting** - Over 45 days requires a late submission justification
 - IRS Document Legibility Standards: The IRS requires all Concur/Express records and receipts to be legible.

Note: All reimbursements will be based on Travel Accounting's approval



Business office will support booking your airfare through Concur, more information on the next slide.

- You will still be able to earn miles/points, please provide your Frequent Flyer # on your flight request to the Business Office, you can also add your information directly with the airline after your flight has been booked.
- We can purchase guest airfare (Visiting Professors, Guest Speakers, etc.) please reach out to the Business Office for more information.
- Due to fluctuation in airfare rates, please submit your flight request as soon as possible.

CONCUR – Flight Request & Flight Upgrades

- Please provide the Business Office your DAPM Flight Request form and ensure you have assigned the Business Office as a Concur Expense Delegate to process your request. Please reach out to your assistant for more information.
 1. Business Office will submit your flight request (Flight Class: Economy/Coach class)
 2. UC Travel Center will provide your flight itinerary for your review and approval
 3. Upon your approval, the UC Travel Center will purchase your airfare
 4. Business Office will allocate your airfare expenses to the appropriate fund
- **Flight Upgrades:** Once the Business Office has booked your airfare, with your confirmation #, you may contact the airline directly to purchase any upgrades or use your membership status for free upgrades. Please note you will be responsible for any upgrade expenses.

Please note: Due to their ticketing restrictions, the following carriers cannot be booked in Concur: Air Niugini, Air Tahiti, Air Uganda, Big Sky, Biman Bangladesh, Cape Air, Comair, Contour Airlines, Ellinair, Frontier Airlines, Flydubai, Great Lakes, Israir, Myanmar Airways, Norwegian Air Shuttle, Sky Airline, Solomon, Spirit Airlines, Sun Country Airlines, Tuifly, Uni Airways, Xiamen Airlines.

Approved Class Seats

Airlines	Seating Class
American Airlines	Main Cabin
Alaska Airlines	Main
Breeze	Nicer
Delta	Comfort Plus
Hawaiian	Main Cabin
Jet Blue	Blue
South West	Anytime+
United Airlines	Economy
Virgin America	Economy Classic

*Please let us know if there are other airlines you would like to be added to this list.

**Any seat upgrades will not be reimbursed

Airfare – Personal Days

For any flight reimbursement that includes personal days:

We would cover up to the max on their return flight after the business conference is over. IE. The return flight on the next day after the business conference.

Example below:

1. Mon-Wed = Business Conference
 - a. Thursday = Return flight || This is the price we would cover ie. \$400
 - b. Personal return flight = next Wednesday || the cost of this return flight is \$500
 - c. If the expense is cheaper, the fare is reimbursed at that rate

In this scenario, we would only cover up to \$400, and the business traveler will pay the differential. The business traveler must take a screenshot of the return flight at the time of booking.

Travel Insurance and Security Protection Benefits

- **Travel Registration:**

- Benefits:
 - Campus leadership can identify if you may be impacted by an event
 - You will receive real-time email alerts from UC's security partner Crisis24
- How to Register Travel:
 - Travel booked through UC Central Travel (aka UC Connex or Connexus) is automatically registered.
 - Manually register in the UC Away web portal (<https://ehs.ucop.edu/away>) when two or more people are booked on the same confirmation number
- For emergencies, update Emergency Contact Info in WorldCue (<http://ermisp.ucop.edu/uctrip>) when traveling >100 miles
 - Go to "My Profile" and provide cell phone number, email address, emergency contact, and traveling info

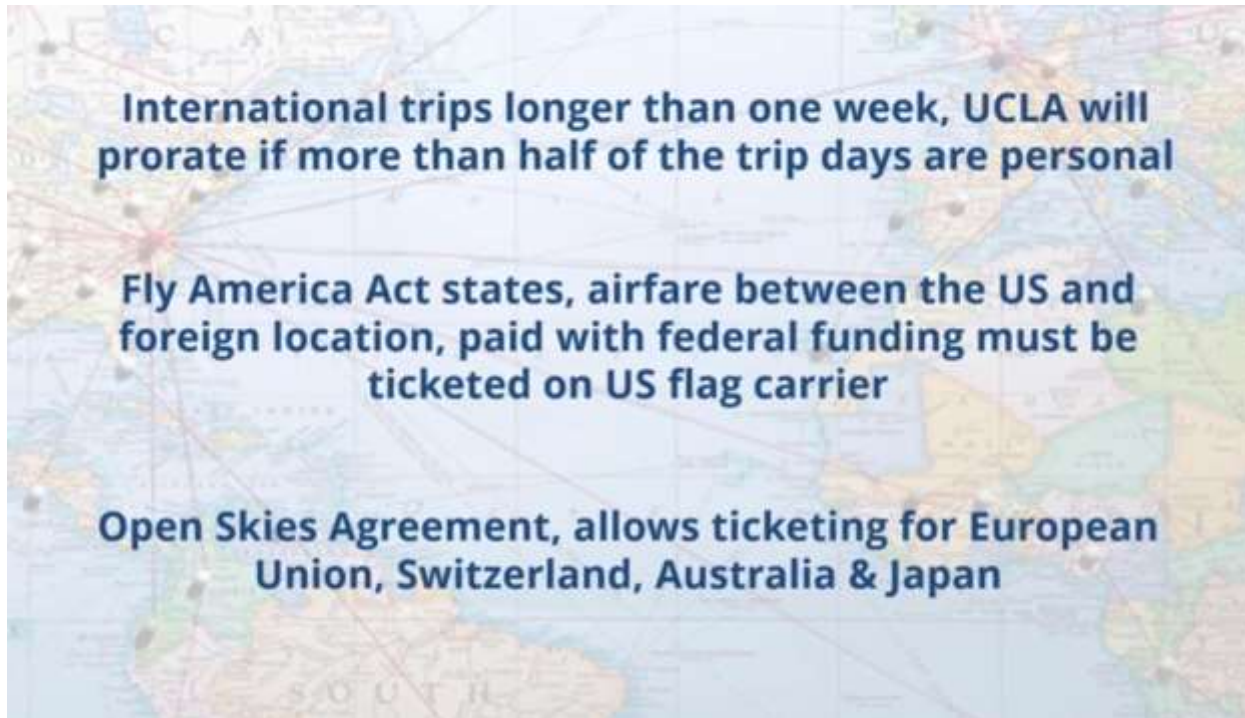
- **Travel Insurance:**

- Domestic (All US states including Alaska and Hawaii):
 - Includes travel inconvenience benefits for domestic travel (trip cancellation, interruption, delay and baggage delay for covered reasons)
 - No medical coverage – use health insurance or Worker's Comp
 - Does not cover Quarantine/isolation costs related to COVID-19 or any other illness
- International (and US Territories):
 - Medical and security evacuation coverage
 - Medical coverage for accidents and illnesses
 - Mental health counseling
 - Personal property and lost baggage coverage
 - Quarantine coverage –documented COVID+ test REQUIRED

**Coverage applies to those traveling on UC Business or students participating in University programs, including traveling companions on the same itinerary.

**Coverage differs between the student and employee policy. Details can be found at: <https://www.ucop.edu/risk-services-travel/>

International Airfare



United States Carrier:

- American
- United
- Delta

Other Carrier:

- EU Union
- Switzerland
- Australia
- Japan

*Airfare will be prorated

***Highly recommended to purchase airfare through Concur for international travel if we are utilizing federal funding

****Anes Business Office will assist with Concur

Documentation

Not itemized
Not reimbursable

Harvest Moon
12125 N Oracle Rd D5
Tucson, AZ 85739
TEL: 520-825-5351
www.harvestmoontucson.com

CARD TYPE : MC
CARD HOLDER : ██████████
CARD NUMBER : ██████████
EXPIRATION DATE : XXXX

DATE : 2013-11-11 TIME : 1:57:34 PM

Invoice# : 00301111
Table# : 805
Server Name : CYNTHIA_LOPEZ

Charge Amt\$: 19.46

TIP AMOUNT\$ _____

FINAL AMT\$ _____

Itemized
Reimbursable

Harvest Moon
12125 N Oracle Rd D5
Tucson, AZ 85739
TEL: 520-825-5351
www.harvestmoontucson.com

Re-Printing 1

Dine In

Date: 11-11-2013 Time: 1:23PM # 30

Server: CYNTHIA_LOPEZ

TAB#: 805

No. of Guest : 2

1 L- Cashew Chicken w. Brown Rice w. Egg Flower Soup	7.50
1 L- Mongolian Chicken w. Brown Rice w. Egg Flower Soup	8.00
1 Hot Tea (per pot)	2.50

Amount : 18.00
TAX(8.1%) : 1.46
TOTAL : 19.46

DOCUMENTS



All reimbursement documents

- justification statements
- expense report comments
- uploaded receipts
- do not include Personal Identifiable Information (PII)

Are subject to public records requests

The traveler must highlight/attest to their portion of the receipt

*Credit Card statement is not an itemized receipt

University Hosted Business Meetings

Entertainment Meals

The maximum meal rates for entertainment and business meeting meals have been increased in response to soaring food prices. The new rates are as follows:

Breakfast	\$31
Lunch	\$54
Dinner	\$94
Light Refreshments	\$22

As a reminder, these amounts include the cost of food and beverages, labor, sales tax, service, and delivery charges except for the donor and recruitment related events hosted by the President and Chancellors. Guidance for the President and Chancellor related events was provided on February 9, 2022 and July 13, 2022 (attached). The cost of room rental, room set-up fees, media rental, and decorations, etc., are not included in the per-person costs.

Business and Finance Bulletin BUS-79, Expenditures for Entertainment, Business Meetings, and Other Occasions, will be revised to include this information.

- Pre-Approval for business meetings.

(Note: The above is for University-hosted meetings, not an individual traveler's daily meal & incidental expenses. The daily cap on meal & incidental expenses for UC business travel is \$79 within the continental United States.)

Car Rental – Insurance Coverage

ii. Insurance Coverage

Travelers are expected to use rental agencies with which the University has systemwide contracts that include insurance coverage. The following rules apply to insurance coverage for rental cars:

- The cost of full collision coverage for rental cars used in Alaska, Hawaii, U.S. possessions (OCONUS), and foreign countries, is allowable.
- *On contract rental vehicles used in the continental United States (CONUS)*, charges for additional insurance are not allowable, including any charge for a collision damage waiver (CDW).
- 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 an agreement with the University.
- It is recommended that employees purchase supplemental insurance when renting a vehicle outside the U.S.
- A vehicle rented from an agency with which the University has an agreement is not covered by insurance when it is being used for a personal day of travel.

Car Rental

1. Enterprise:

- <https://elink.enterprise.com/en/20/10/uc-los-angeles-personal-use.html>

2. Hertz:

- https://offer.hertz.com/offers/index.jsp?targetPage=Hertz_Getaway_UCA.jsp

b. Rental Cars

i. Authorization to Rent

A vehicle may be rented when renting would be more advantageous to the University than other means of commercial transportation, such as using a taxi. Advance reservations should be made whenever possible and may include up to an intermediate-size model, per the terms of UC-negotiated rental agreements. Vehicles up to an intermediate-size model should be used unless a no-cost upgrade is provided. When the University's rental contracts provide for refueling charges at a negotiated rate, this option may be selected to purchase fuel in advance. Hand-held or uninstalled GPS devices should not be rented unless the traveler is unfamiliar with the location of travel. The use of other higher cost upgrades requires exceptional approval.

The traveler is responsible for obtaining the best available rate commensurate with the requirements of the trip. **The discount negotiated with car rental agencies by the University should be requested when available.** The University's [Connexus](#) website provides the rental agency's University identification number, which should be given to the agency at the time of rental in order to ensure that the vehicle is covered by physical damage insurance.




Standard
Volkswagen Jetta or similar
Automatic | 5 People | 3 Bags

PAY LATER
\$46.00 Per Day | \$65.21 Total

Select

Features & Price Details

Custom Rate



Standard 2/4 Door
(D) VW Jetta or similar ⓘ

5 | 3 | A | 20 mpg

40.00 USD Per Day
(58.12 USD Approx Tot)

Select

Ground Transportation

- **Uber for UC:** receipt required – University of CA profile required to utilize UC benefits, more information and how to enroll on the following slide
- **Lyft/Uber:** receipt required - any upgrades (priority pickup, etc.) are not reimbursable unless with business justification or following justifications:
 - Uber/Lyft upgrades are cheaper than regular rides (provide us with a screenshot of the comparison prices)
 - Took XL rides with multiple people and requesting their portion of reimbursement of the XL price
- **Taxi/Metro/Subway:** receipt required
- **Arrange the travel in chronological order (if there is more than one)**
- **Receipt**
 - Date of trip
 - Total cost (including tip)
 - Check the tip
 - Tips cannot be more than 20% of the bill
 - Tips that exceed 20% of the bill will be adjusted to a maximum of 20%
- **Make sure starting point, and destination are included for each trip**
 - For uber and Lyft, be sure to include the page with the map(s) and addresses
- **Payment method**
 - Last four digits of the credit card on the receipt
 - Bank/Credit card details
 - Please note that Apple Pay is not a Travel Accounting approved method of payment; a credit card statement must be submitted with the apple pay

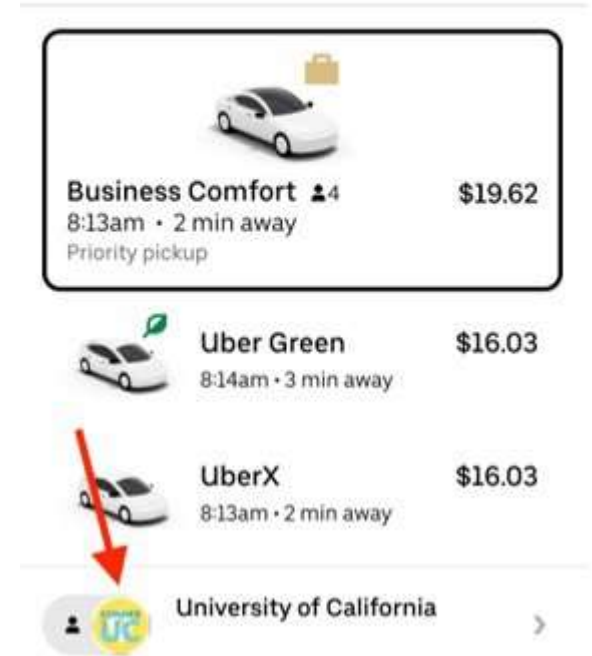
Ground Transportation

Uber for UC - UC Partnership with UBER

- Benefits: Priority Pick-Up, Business Comfort, access to premium support, and budget friendly options

Uber for UC – How to Enroll

1. **Get Started:** Scan the QR code (bottom right) or [CLICK THIS LINK](#) to get started.
1. **Sign In:** Sign in with your existing Uber credentials (your personal email address or cell phone number if you already have an Uber account).
2. **Add Credit Card:** After accepting the invitation, you'll be prompted to add your credit card to the business profile.
3. **Toggle:** Please check in your Uber Wallet that your Ride Profiles include *University of California*. You will toggle over to this new profile when booking a ride or ordering a meal for business
4. **Ride:** Make sure to select the *University of California* profile when scheduling a ride for business. You'll have a separate payment profile for business purposes.



Ground Transportation

- **Minimum Liability Coverage**

When private cars are used on University business, the employee must certify that the vehicle has the minimum liability coverage prescribed by UC Policy G-28:

- \$50,000 for personal injury to, or death of, one person.
- \$100,000 for injury to, or death of, two or more persons in one accident.
- \$50,000 for property damage.

<https://travel.ucla.edu/policy-resources/mileage-fuel-expenses-for-university-travel>

Lodging

CONUS:

- Up to \$275 per night max if it's not at the conference hotel
- The total amount can be reimbursed if it is at the conference hotel's **documented standard conference room rate**
- If the conference hotel is fully booked, the next closest lodging can be reimbursed at the conference rate
 - Must provide documentation that the hotel conference is completely booked

OCONUS: (Foreign Travel / Alaska / Hawaii):

- Nightly rate is based at the location and the date selected on the link below
- OCONUS
 - IE. Honolulu is around \$177 a night for non-conference hotels

Special Business Events prior to the conference start date, we will use that as the start date for your business travel ie. Conference starts on Friday, but Thursday night had a speaker dinner event, Wednesday night would be covered

Lodging will not be reimbursed if the lodging site/hotel is within a 40-mile radius of the traveler's residence or office

Do not book with 3rd party vendor that doesn't provide itemized receipt of the lodging. (IE. Expedia and Hotels.com, etc.) You will be at risk to not be reimbursed.

We do not reimburse for non-UCLA employees that doesn't have a business justification.

Lodging and M&IE Reimbursements

Click below for more details:

- CONUS
 - <http://www.gsa.gov/portal/category/21287>

- OCONUS
 - <https://www.travel.dod.mil/Travel-Transportation-Rates/Per-Diem/Per-Diem-Rate-Lookup/>
 - Foreign travel / Hawaii / Alaska

45 Days – Reporting Period

I. Reporting Travel Expenses

A travel expense claim (Form U85 or an equivalent, or an electronic version) shall be used to account for all travel advances and expenses incurred in connection with official University travel. When properly completed and approved, this form is used to reimburse the traveler for any additional amounts due. ***A travel expense claim must be processed even if no reimbursement is due to the traveler.***

1. Reporting Period

The travel expense claim must be submitted to the disbursements/travel accounting office (or equivalent office on campus) within a reasonable amount of time not to exceed 45 days after the end of a trip unless there is recurrent local travel, in which case claims may be aggregated and submitted monthly. [If a Travel Card is used, campuses have the discretion to require a shorter time frame for submission of the travel expense claim]. When a trip lasts more than 90 days, the traveler must submit a quarterly report of expenditures to the disbursements/travel accounting office. Travel reimbursement requests submitted after 45 days are left to the discretion of the campus, considering the facts and circumstances, whether the reimbursement will be made and if any reporting as taxable income will be required. See section II.B.1 of Accounting Manual Chapter D-371-12.1, for the proper reporting of taxable travel reimbursements to both employees and nonemployees.

Can be denied if it's not submitted within 45 days and/or be reported as taxable income

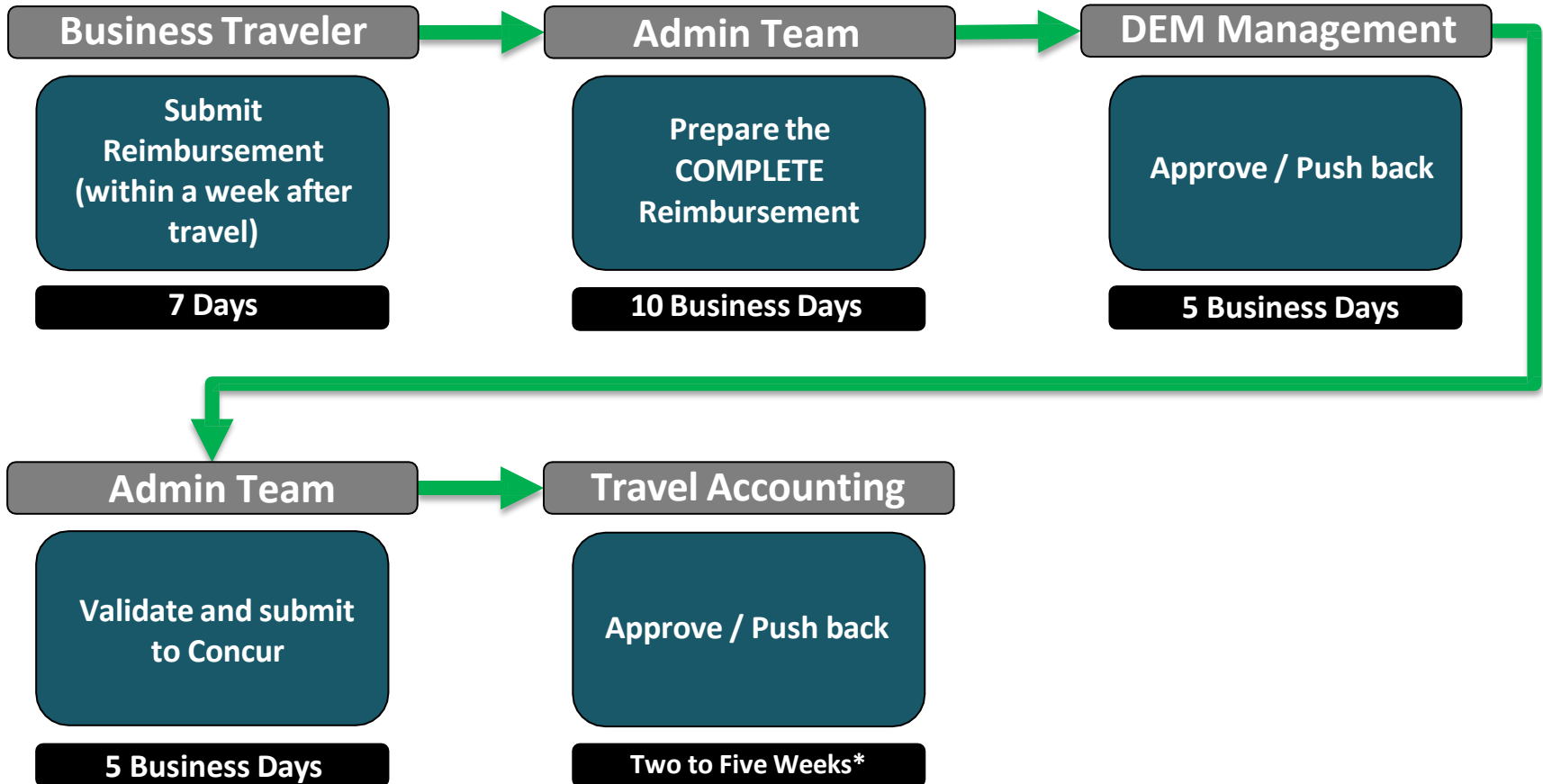
Policy Link

UC Policy Links:

- [BUS 79 Business Meetings Entertainment \(ucop.edu\)](#)
- [G-28 Travel Regulations \(ucop.edu\)](#)
- <https://travel.ucla.edu/policy-resources/reimbursement-allowances-mileage-meals>

Reimbursement Process Timeline

45 days to submit to Travel Accounting for review



*Can extend beyond five weeks