

# VC Research

## Travel and Working Meeting Guidelines

It is the policy of the University that all business travel shall be properly authorized, reported, and reimbursed in accordance with UC policy. Under no circumstances shall personal expenses be charged to, or be temporarily funded by, the University. Reimbursement requests should explicitly indicate if any names should be kept confidential in the event of a public records request, and the information will be redacted when appropriate. This applies to names of potential donors, candidates for open positions at UCLA, or other individuals who are not employed at UCLA.

All travel reimbursement requests should be submitted within 60 days of the travel or event. If submissions are made after 60 days, the amount of the travel or event expenses may be imputed as income to the employee on the employee's W-2 unless there is a reasonable justification for the late submission. In all cases, if the submission is made more than 6 months after the end of the trip or event, income will be imputed on the employee's W-2.

### **Travel & Entertainment Card**

Travel expenses that can be appropriately charged under the T&E Card:

- Transportation (i.e. airfare, rental car)
  - We encourage travelers to reserve their air travel as far in advance as possible, and no later than 2 weeks in advance of the departure date, through the UC Travel Center's Connexus Portal (link: <http://map.ais.ucla.edu/go/1004590>) to minimize out-of-pocket expenses to the greatest extent possible. After the reservation(s) is placed, please notify the OBFS office (Melissa or Myte) to finalize the payment process. Airfare is only reimbursed after the business trip is complete.
  - Rental Car-- Travelers are expected to use the University's preferred rental car vendors and request the UCLA discounted contract rate. The agreements include the highest level of Loss Damage Waiver (LDW) and Liability insurance and therefore not reimbursable, so please do not select this option. Additional Information can be found at the following site: <http://map.ais.ucla.edu/go/1000051>
  - Local transportation charges (such as bus, taxi or train) are allowable. Receipts need to be submitted to the OBFS office (Melissa or Myte) as part of the reimbursement process. Tips are not to exceed 20% of the transportation cost. Transportation expenses for privately owned motorcycles or motor-driven cycles will not be reimbursed.
- Lodging Expense (No pre-paid lodging expense allowed)
  - Reimbursement is based on actual expenses incurred, and additional justification may be requested if the room rate is above the average for the local area.
  - Original, ***itemized receipts*** for all lodging expenses as well as any working business meeting expenditures included in the lodging claim are required for reimbursement.
  - As per policy G-28, Lodging is not reimbursable if the lodging site is within a 40-mile radius of the traveler's residence or office.
  - It is important to note that travel packages from internet vendors such as Expedia and Orbitz typically do not itemize expenses. Therefore, no business-related travel should be booked through such vendors unless the traveler confirms in advance that airfare, hotel,

# VC Research Travel and Working Meeting Guidelines

and rental car will be itemized separately. Travel packages that are not itemized will not be reimbursed.

## **Exemption from Occupancy Tax**

As a general rule, University employees traveling on official University business are exempt from payment of occupancy taxes imposed by certain California cities or counties on rental rooms. To avoid misunderstandings, travelers should identify themselves as University employees and claim exemption from the tax when checking into the hotel. However, occupancy tax ordinances in a few California cities do not authorize exemptions for University employees.

## **Travel Paid Directly by the Traveler**

The cities of Los Angeles, Costa Mesa, Santa Ana, Irvine, Newport Beach, Del Mar, Riverside, Coronado and Oakland provide exemption to University travelers who pay hotel room charges directly, upon completion of a city form or a certificate of exemption for governmental agencies.

## **Travel Billed to and Paid Directly by the University**

The cities of San Francisco and San Diego grant an exemption from such taxes only if hotel room charges are billed directly to the University.

The traveler may complete an exemption certificate if one is required. The certification notice can be downloaded from the following site:

[http://www.travel.ucla.edu/new/PDFs/Policy\\_OccupancyTax.pdf](http://www.travel.ucla.edu/new/PDFs/Policy_OccupancyTax.pdf)

Travel of Less than 24 Hours--When the entire length of a trip is ***less than 24 hours***, meals and incidental expenses cannot be reimbursed unless the travel includes an "overnight stay" as supported by a lodging receipt. An exception to the overnight-stay requirement ***may*** be allowed when a traveler incurs a meal expense in connection with a business meeting (e.g., a working lunch scheduled as an integral part of a meeting or conference). The business purpose of the meal must be explained or substantiated by other documentation (e.g., an agenda), which should be attached to the Voucher. Reimbursement for the cost of the traveler's meal is allowed up to the maximum amounts set by UC policy.

- Meals and Incidentals
  - Reimbursement will be based on the actual amount the traveler paid while on University business, subject to a limit for each full day on travel status. Current limit, for domestic travel, is \$71/day. Please note this is not a per diem.

## **Working Meetings**

- How to Claim Reimbursement

Please submit all documents including the completed ORA Travel/Business Meeting Reimbursement request form and the itemized receipts to Melissa Cervantes within 5 business days of the event. Please note, tips should not exceed 20% of the meal cost. All working business meeting expenses must be pre-approved by the director of the individual claiming a reimbursement.

## VC Research Travel and Working Meeting Guidelines

- Required Information
  - Type of Expense (breakfast, lunch, dinner, refreshment)
  - Type of Event (workshop, conference, staff recognition, etc.)
  - Purpose of the event or main agenda topic
  - Attendee list to include name, title, and affiliation of participants
  - Date and location of event
  - Name of the official host
  
- Maximum per Person Rates

Breakfast	\$26.00
Lunch	\$45.00
Dinner	\$78.00
Light refreshments	\$18.00