

# UCSF Travel Overview

For Business Travelers, Travel  
Arrangers, and Travel Approvers

02/10/2014

# Business Travel is Complicated



We understand travel can be complicated, remembering all the policies, procedures to follow, forms to complete, and the fact you already have a day job.

This overview will provide you basic information to get you started with booking travel & understanding policies and procedures.

# Business Travel Comes with Responsibilities

- Must be good stewards of UCSF resources
- Expenses are public record
- Open to a high level of scrutiny
- Never lavish or extravagant
- Business travel is not allowed except under certain situations. Talk to your travel coordinator.

# Travel Policy

- Business & Finance Bulletin, G-28, Travel Regulations
- Issued by Office of the President



# Policy Highlights

## Airfare

- Connexus is preferred travel reservation portal
- Airline tickets should be coach class
- Travel packages offered through the internet should not be purchased for business related travel

## Rental Car

- Utilize system-wide, contracted rental car companies
- Rental cars – up to be intermediate-size model
- On contracted rental vehicles, do not purchase additional car insurance

## Lodging

- Hotels should be reasonable
- Regardless of the length of time for business travel, the traveler must be at least forty miles from the headquarter location or home, whichever is closer, to be reimbursed for an overnight stay

# Policy Highlights (cont.)

## Meal & Incidental Expenses

- For travel less than 24 hours, M&IE shall not be reimbursed unless the travel includes an “overnight stay” (except when a traveler incurs a meal expense in connection with a business meeting)
- Daily meal limits for Domestic Travel <30 days - reimbursement is based on actual expenses, up to \$71 per day
- Daily meal limits for Foreign Travel <30 days – reimbursement is based on actual up to the 100% of combined (meals, lodging, etc.) per diem limit for that location

## Miscellaneous

- Receipts are required on all airline, rental car, lodging, and private craft, and parking expenses. For most other expenses receipt required for >\$75
- Agenda should be provided as supporting documentation
- Dry Cleaning & Laundry Expenses – excess of six consecutive business days
- One reasonably brief, non-emergency, personal call home per day while on travel status
- Expense report should be submitted within 60 days of the end of the trip

# Before the trip

- Sign up for access to Connexus, by emailing the [COSolutionCenter@ucsf.edu](mailto:COSolutionCenter@ucsf.edu)
- Optional: Request a US Bank Travel Credit Card, Application at Accounts Payable Website
- Optional: If you do not have a US Bank Travel Credit Card – you may request a Travel Advance, Form at Accounts Payable Website
- Obtain a speedtype from your Finance Manager in order to direct bill UCSF for travel bookings made through BCD & UCTC travel agencies within Connexus
- Approval for each trip from your Manager

# While Traveling



- Be familiar with the policies
- Keep all receipts for flight itinerary, car rental agreement, hotel statement, and for any other expenses >\$75
- Keep emergency travel agent phone number
- Internet charges, daily allowance for personal calls are allowable
- GPS, movies not allowable
- Laundry allowable after 6 travel days



# When you return



- Submit a completed and approved expense report using MyExpense within 60 calendar days of return date
- Itemize expenses on the expense report
- Provide justification (the story) if needed
- Attach required receipts and agenda
- Once expense report is approved, payment generally issues within 4 business days.

# Let's Summarize...

- Go to the Accounts Payable website to become familiar with travel and reimbursement.
- Read the Travel Policy, UCOP G-28
- Email [COSolutionCenter@ucsf.edu](mailto:COSolutionCenter@ucsf.edu) to gain access to the Connexus Travel Portal. You will also need a log-in to MyAccess (single sign on portal)
- Book economy flight, reasonable hotel, and cars up to an intermediate-size model
- Obtain speedtype or chartstring from your Finance Manager for direct air bill with BCD and UCTC travel agencies within Connexus
- Submit an approved expense report with required receipts within 60 days after the end of the trip
- Contact the CO Solution Center if you have any questions

# Who Can Help

For assistance with policy questions, SOM Exceptional Expense Approval contact Simon Schuster at:

- 415-502-0760
- [simon.schuster@ucsf.edu](mailto:simon.schuster@ucsf.edu)

