BEFORE TRAVEL: PREAUTHORIZING TRAVEL

Please notify your Faculty Assistant (FA) via e-mail with the following information when you know you will be traveling so that a travel event (or trip) number may be generated: the dates of your travel, the destination, and the purpose of the travel (e.g., “To attend the AACR meeting”), and what index number(s) will be used to reimburse your expenses (e.g., PI startup funds, training grant, etc.). Establishing a trip number prior to travel will allow your FA to prepay certain travel expenses and expedite reimbursement as the expenditures will be preauthorized.

BEFORE TRAVEL: PREPAYMENTS AND UNIVERSITY RESOURCES

UCSD can reduce out-of-pocket travel expenses by issuing prepayments before the trip takes place. This is advantageous for travelers because out-of-pocket expenses, even those incurred months prior to the trip, cannot be reimbursed until after the trip is complete.

Student Certification for Business Travel: UCSD students must submit a completed and signed UC San Diego Student Certification for Business-Related Travel form to their FA before any prepayments or reimbursements may be processed.

Airfare: Your FA can book both domestic and international flights for UCSD travelers via Connexxus. Provide your FA with your requested flight or preferred date, time, airline, frequent flyer number (if applicable), seating preference, and date of birth (required by the TSA). The airfare will be charged directly to the trip number. If you book airfare outside of Connexxus and are traveling outside of California, register your trip here to ensure coverage by UCSD’s travel insurance policies. Note: packages deals must clearly specify the cost for each component to comply with UCSD policy and IRS requirements.

Hotel: Per campus policy, the maximum reimbursable room rate is $275/night (excluding taxes and fees). FAs can arrange hotel stays for local guests via Connexxus at discounted UCSD rates once a UCSD traveler profile has been set up. Additionally, US hotels may be prepaid via check to avoid out-of-pocket expenses. To prepay a hotel expense, send your reservation confirmation to your FA at least three weeks prior to your trip. Be sure that it includes the hotel’s contact information, the full amount of your stay (including taxes and fees), and your reservation number.

Registration: If you are attending a meeting and the registration may be paid in US$, UCSD can prepay the cost of your registration. Please notify your FA at least three weeks prior to any payment deadlines.

Car Rental: UCSD has car rental agreements to ensure economical pricing and insurance coverage for business travelers. FAs may set up car rental using the traveler’s credit card, or travelers may book car rental online or via phone.

BEFORE AND DURING TRAVEL: REQUIRED RECEIPTS

Air Travel: To be reimbursed for out-of-pocket airfare, provide your FA with a receipt showing the traveler’s name, cost of the airfare, flight information, and form of payment. Excess baggage fees are also reimbursable. Receipts for package deals must clearly specify the cost for each item. Food purchased on the plane may be reimbursed if it complies with Meals guidelines. UCSD cannot reimburse airfare that has been upgraded from standard coach except in very limited circumstances (e.g., medical necessity with a doctor’s note if funding sources allow). If you buy non-coach airfare out of pocket, you will only be reimbursed for the cost of a coach ticket.
Ground Travel: Ground expenditures are reimbursable, including but not limited to mileage, taxis, parking, car rental, and gas purchased for a car rental. No receipts are required for ground expenses <$75, but these expenses must be tracked in an itemized travel expense summary organized by day and type of expense. Original receipts are required for expenses ≥$75 per transaction. To receive reimbursement for mileage, provide your FA with a mileage summary that shows the starting point and destination, such as directions provided by Google Maps.

Hotel: A hotel invoice is required if lodging expenses are charged to the trip. Room service and meals charged to the room may be reimbursed if they comply with Meals guidelines.

For trips ≥30 days and travel outside the continental US travelers may request reimbursement for actual hotel expenses, or the traveler may request a lodging per diem. Actual lodging expenses may not exceed the per diem amount, except under special circumstances. A hotel receipt is not required if a lodging per diem is requested.

Registration: For out-of-pocket registration fees, provide a receipt showing the name of the participant and a confirmation of payment. Please inform your FA if the registration includes room, board, or meals.

Meals: For travel <30 days within the continental US, no receipts are required for meal expenses ≤$62 per day. However, actual meal expenses must be tracked in an itemized travel expense summary organized by day and type of expense (excluding meals included in conference registration). Original receipts are required for expenses >$62. If a traveler routinely claims the maximum amount, receipts may be required thereafter by the travel approver. For travel outside the continental US or trips ≥30 days, a meals per diem may be claimed. If actual meal expenses exceed the per diem rate due to special circumstances, itemized receipts are required to claim the actual expenses.

Alcoholic beverages purchased during travel are not reimbursable.

Miscellaneous Expenses: Miscellaneous expenses pertaining to the business purpose (e.g., passport fees, poster printing, internet access) may be reimbursed.

REQUESTING REIMBURSEMENT

When you return from your trip, please provide your FA with required receipts as soon as possible. UCSD policy states that receipts must be processed and approved by the department within 21 days of travel. Late reimbursement submissions may be treated as tax-reportable income or not paid at all.

Once the reconciliation has occurred, you will receive an e-mail from Travel asking you to certify your travel expenses. UCSD travelers must certify their expenses in order to receive reimbursement. Contact your FA if you have any questions or concerns regarding the reimbursement amount or if you are unable to certify the expenses. Please allow three weeks after certifying the trip before following up on the status of your reimbursement.