Standard Reimbursements

In order to receive reimbursement for allowable* out-of-pocket purchases (e.g., supplies, materials, subscriptions, memberships, software licenses), send receipts to your Faculty Assistant (FA) for processing. **In addition to an itemized receipt that shows the method of payment and date of purchase, an allowable funding source/COA must be provided in order to receive reimbursement.**

You and any lab members with reimbursable expenses must also add your FA as a request and expense delegate in Concur. Instructions for doing so may be found [here](https://support.ucsd.edu/services?id=kb_article_view&sys_kb_id=287c8670dba5d8104cd8f06e0f9619d1) (https://support.ucsd.edu/services?id=kb_article_view&sys_kb_id=287c8670dba5d8104cd8f06e0f9619d1).

Additional information may be required based on the type of expense:

- Food/Meals ([Standard Entertainment](#))
  - Business purpose (e.g., "lab meeting to discuss chromatin remodeling")
  - List of attendee names and affiliations (e.g., "Joanna Smith, UCSD Postdoc")
  - Location (if not clear from receipt)
- Memberships
  - Term of membership (if unclear from receipt)
  - Full name of the organization (if unclear from receipt)

Many funding sources restrict what items may be reimbursed. For example, federal and Biological Sciences funds may not be used to purchase or reimburse the purchase of cell phones/smartphones or mobile phone accessories, services, or plans.

Travel Reimbursements

Before Travel: Preauthorizing Travel

When you or a member of your lab is planning to travel on university business, notify your Faculty Assistant (FA) via e-mail with the following information so that a travel request (or trip) number may be generated:

- the dates of travel
- the physical destination
- purpose of the trip (e.g., "To attend the AACR meeting")
- Approximate cost/types of expenses that will be incurred
- Funding source (COA) that will be used to reimburse travel expenses

Establishing a trip request prior to travel will allow your FA to prepay certain travel expenses and expedite reimbursement as the expenses will be preauthorized.

UCSD travelers must designate their Faculty Assistant as their travel, request, and expense delegate in Concur.

Instructions for doing so may be found [here](https://support.ucsd.edu/services?id=kb_article_view&sys_kb_id=287c8670dba5d8104cd8f06e0f9619d1) (https://support.ucsd.edu/services?id=kb_article_view&sys_kb_id=287c8670dba5d8104cd8f06e0f9619d1).

To review current Travel Reimbursement Policy, please see the "Policies" section of [Accounting Tips and Tools](#) on the Divisional website (https://biology.ucsd.edu/administration/units/financial-services/accounting-tools.html#Policies).

Before Travel: Purchases and Prepayments

Once a trip has been preauthorized, your FA can help reduce out-of-pocket travel expenses by purchasing airfare and issuing prepayments for certain expenses 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. A PI may also charge their own travel expenses to their T&E Card (see **Travel & Entertainment Card**). Contact your FA to initiate any of these purchases or prepayments:

Airfare

Your FA can book both domestic and international flights for UCSD travelers via Concur. 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 travel request.

If you book airfare outside of Concur 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. If you have a T&E Card, you may pay your flight using your card. The flight expense will be automatically strip billed to the University.

Campus air travel policy may be viewed here: https://blink.ucsd.edu/travel/travel-policy/air/index.html

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 Concur 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 four 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. If you have a T&E Card, you may prepay your hotel expenses using your card.

Current hotel and meals reimbursement policies may be viewed here: https://blink.ucsd.edu/travel/travel-policy/meals-lodging/index.html

Registration

If you are attending a meeting and the registration may be paid in USD, UCSD can prepay the cost of your registration. Please notify your FA at least four weeks prior to any payment deadlines. If you have a Travel & Entertainment Card, you may prepay your own registration using your card.

Car Rental

UCSD has car rental agreements to ensure economical pricing and insurance coverage for business travelers. FAs may set up car rental via Concur using the traveler's credit card, or travelers may book car rental online or by phone referencing UCSD's pricing agreement numbers, which may be found along with campus car rental policy, here: https://blink.ucsd.edu/travel/training-guidelines/booking/automobiles/car-rental.html.

Please note that since insurance coverage is included in UCSD's rental agreements for domestic business travel, added insurance coverage may not be reimbursable. Additionally, business travelers are generally limited to intermediate-size vehicles or smaller unless a no-cost upgrade is provided.

Student Travel Form

If you sponsor business travel for any students, they must submit a completed [UC San Diego Student Certification for Business-Related Travel form](#) to your FA before any of their prepayments or reimbursements may be processed.

Before and During Travel: Collect 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 purchase upgraded airfare out of pocket, you will only be reimbursed for the cost of an economy ticket unless the upgrade was obtained at no cost.

Ground Travel

Ground expenditures are reimbursable, including but not limited to mileage, rideshares/taxis/shuttles, parking, car rental, and gas purchased for a car rental. No receipts are required for ground expenses of less than $75 per transaction, but these expenses must be tracked in an itemized [travel log](https://biology.ucsd.edu/_files/administration/fiscal/TravelLog.xlsx) (https://biology.ucsd.edu/_files/administration/fiscal/TravelLog.xlsx), 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. Note: mileage for moves is reimbursed at a lower rate than mileage for standard business travel. Current rates and policies may be viewed here: https://blink.ucsd.edu/travel/travel-policy/ground-travel/index.html

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 log](https://biology.ucsd.edu/_files/administration/fiscal/TravelLog.xlsx) (https://biology.ucsd.edu/_files/administration/fiscal/TravelLog.xlsx) organized by day and type of expense

(excluding meals included in conference registration). If a traveler routinely claims the maximum amount, receipts may be required thereafter by the travel approver.

Original receipts are required for expenses >$62.

For travel outside the continental US or trips ≥30 days, a meal 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 if an itemized receipt is provided.

After Travel: Submit Receipts

After the trip, please provide your FA with the required receipts and travel log (if applicable) as soon as possible. UCSD policy states that receipts must be processed and approved by the Division within 21 days after the end of the trip. Late reimbursement submissions may be treated as tax-reportable income or not paid at all.

Once the reconciliation has occurred, travelers will need to certify their travel expenses in Concur under the Expenses tab 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.