

UCLA Travel Guidelines

Travel and entertainment are essential to the operation of the institution, the fulfillment of its academic reputation, and fundraising. University of California [Policy BFB-G-28](#) describes rules and procedures governing business-related travel for UCLA employees. [Policy BUS-79](#) addresses reimbursements for business meals and entertainment. Both policies are designed to ensure that the University complies with relevant IRS regulations. In addition, the Office of [Travel Services](#) offers a variety of informational resources about business travel and entertainment.

UCLA encourages individuals to be prudent in making travel and entertainment arrangements. The guidelines presented below supplement IRS regulations and University policies in order to assist UCLA faculty, staff and administrators in maintaining their fiduciary duty to use University resources appropriately. Staff in Travel Accounting, the Director of Travel Services, and the Associate Vice Chancellor/Controller are available to offer guidance about specific situations and requests.

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I. AIRFARE

- a. In general, UCLA will pay for economy fares. Travel should be scheduled as far in advance as feasible and prudent in order to obtain the lowest possible fares.
- b. UCLA will pay for the least expensive business class ticket for those travelers with an approved justification to travel in business class. UCLA will pay for the least expensive first class ticket if the aircraft does not have business class.
 - i. Health requirements must be documented by a licensed physician, acknowledged by the unit's CAO/CFO, updated annually, and maintained securely in the Travel Accounting Office.
 - ii. Employees who wish to purchase an upgradable business class ticket (i.e., a ticket that provides the option to upgrade from business class to first class) must pay any increase in price from a non-upgradeable business class ticket. Documentation of ticket prices from the date of purchase must be attached to the travel reimbursement form.
- c. If vacation days comprise over 50% of international trips longer than one week in duration, UCLA will prorate airfare and other general expenses between vacation and workdays.

In order for UCLA to pay for even a prorated portion of the airfare, the primary purpose of the trip must be UCLA business, not personal.

- d. Travelers should seek advance approval for trips longer than 30 days.
- e. The UC Travel Center can assist with all airfare tickets and advise travelers on how to comply with University policy and campus guidelines. Travel Center staff are trained in providing appropriate documentation for ticket costs, including trips that involve exceptions to policy.

II. HOTELS

- a. Effective October 15, 2017, daily hotel rates will be capped at \$275 per night for trips within the lower 48 states, before taxes and other hotel fees. If the traveler is unable to secure lodging at \$275 per night or less, the traveler must submit additional documentation such as price comparisons within the proximity of the meeting location that supports the higher lodging rate incurred. The price comparisons are to be performed at the time of booking.

A traveler who is required to attend a conference where the prearranged conference-lodging rate exceeds the \$275 per nightcap may stay at the conference hotel without exception approval.

- b. Daily international hotel rates should not exceed 300% of the federal per diem guidelines located at:

http://www.gsa.gov/portal/content/104877?utm_source=OGP&utm_medium=print-radio@utm_term=perdiem&utm_campaign=shortcuts

- c. Travelers must obtain advanced approval (i.e., prior to the hotel stay) of hotel fees in excess of these guidelines.
- d. The UC Travel Center can assist in booking all hotels (other than those with negotiated conference rates). When necessary, the UC Travel Center is trained in providing appropriate documentation for exceeding the hotel per diem requirements.

III. ENTERTAINMENT

- a. Effective October 15, 2017, the new meal cap will be \$62/day. Please note that this amount is the maximum allowed. Reimbursement is limited to actual amounts expended if under \$62/day. Travelers will be required to submit meal receipts if it appears that they are treating the cap as a per diem by routinely claiming the full M& IE amount.
- b. Events with light refreshments should be distinct from events with meals. In other words, meals that include appetizers will be reimbursed at the limit for meals, not meals plus light refreshments.
- c. Meals for 11 or more participants that will exceed the University's per meal allowance should be pre-approved.
- d. Catered meals should keep wait staff to a minimum in order to keep costs per person reasonable and within per meal allowances. Wait staff costs should not exceed the cost of food and beverages.
- e. Repetitive meal expenses greater than 100% of the meal allowances will require approval by the Chancellor.

- f. Large quantities of alcoholic beverages or alcoholic beverages in excess of food costs should be avoided.
- g. Tips should not exceed 20% of the meal costs. The host may be asked to pay the difference between a 20% and larger tip.

IV. TRANSPORTATION

- a. Travelers are advised to use taxis, shuttles or other relatively inexpensive methods for transport to and from the airport. When a driver is needed, an adequate business justification specific to the event is required.
- b. Individuals traveling alone who need rental cars should select an intermediate or smaller car. Excess charges for larger cars need proper business justification; the traveler may be asked to pay the difference between an intermediate and larger car if the business justification is inadequate. Advance permission is recommended.
- c. Tips should not exceed 20% of the transportation costs. The traveler may be asked to pay the difference between a 20% and larger tip.

V. BUSINESS JUSTIFICATIONS

- a. Specific business justifications should be written for all travel and entertainment expenses. The justifications should meet the particular circumstances of the travel or expense. Standard justifications increase the risk that the expense will appear inappropriate.
- b. The individual incurring the expense is required to affirm the appropriateness of the business justification by manually or electronically signing the reimbursement request.
- c. If two or more individuals from the same department are required to travel to a conference or other event, an appropriate justification should be approved prior to making arrangements. (This guideline does not apply to academic conferences sponsored by professional/disciplinary associations, because UCLA recognizes that many people from the same department are likely to attend.)
- d. All travel reimbursement documents including detailed receipts are subject to public records requests. The requestor should recognize that the content of his or her justifications might show up in news stories or social media.
- e. Justifications should never include medical information. Keeping an annually updated medical note on file with Travel Accounting and referring to it in the reimbursement request is sufficient.
- f. 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.
- g. 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.

VI. APPROVALS

- a. Exceptions should be approved prior to incurring the exception.
- b. Faculty members who would like exceptions to policy or these guidelines should seek approval from the school's CFO/CAO or Dean as well as Travel Accounting or the Associate Vice Chancellor/Controller. These approvals should be attached to the reimbursement request.