

Travel and Entertainment Policy

We would like to take this opportunity to remind you of some very important things regarding travel and entertainment reimbursements.

- **You have 21 days after the trip to submit your reimbursement.** Anything longer than that will require a memo from you stating the reason for the delay. Failure to submit reimbursements on time could result in becoming **income reportable**.
- Please make sure that the PI signs the reimbursement request as we cannot begin the process without it.
- We will need **all** of your original itemized receipts including proof of payment. These are **REQUIRED** for reimbursement.
- You **CANNOT** pay for another traveler's expenses as they are considered 3rd party. **Only the traveler will be reimbursed.**

Entertainment

- An original **itemized** receipt showing proof of payment.
 - State the purpose of the meeting
 - Include list of attendees, their titles and affiliations.
 - If all attendees are UCLA Employees please provide a justification as to why it was necessary to serve food.
 - Tips should not exceed 20% of the meal costs. Anything greater than 20% is not reimbursable.
 - The current allowance rates (includes tax, gratuity, delivery charges and other service fees) are:
 - Breakfast - \$28
 - Lunch - \$49
 - Dinner - \$85
 - Light Refreshments - \$20
 - Catering for lab meeting can be prepaid using a PO# or Recharge ID# (University funds) by contacting Purchaser, depending on the vendor. Please reach out to your purchaser for more details.
 - **Federal funds CANNOT be used to pay UCLA Luskin expenses.**
1. Entertainment expenses for employee birthdays, weddings, anniversaries, or farewell gatherings (excluding celebrations for retirement or for employees separating from University employment with at least 5 years of service) are **NOT** allowed.
 2. **Employee Meetings (Lab Meetings)**

- The University may pay for or reimburse expenses for meals or light refreshments provided in connection with business meetings involving University employees:
 - If the expenses occur **infrequently (see section 3)**, and
 - If the expenses benefit the University and are reasonable and appropriate to the purpose and nature of the business meeting.
- Catering for lab meeting can be prepaid using a PO# or Recharge ID# (University funds) by contacting Purchaser, depending on the vendor. Please reach out to your purchaser for more details.

3. Frequency of Meals and Light Refreshments

- Meals and light refreshments that are provided by an employer to its employees on a frequent or routine basis are treated by the IRS as taxable income and therefore are not reimbursable under University policy. The following guidelines should be followed in providing meals and light refreshments in connection with business meeting, entertainment event, or employee morale-building activity:
 - **Meals should be limited to no more than once a month or twelve times per year, per group.**
 - **Light refreshments should be limited to no more than twice per month, per group.**

4. The University may pay for or reimburse costs for meals or light refreshments associated with official employee morale-building and appreciation activities that serve a University business purpose. (Examples of such occasions include a gathering to honor a departing employee who is retiring or who is separating from employment with the University after *at least* 5 years of service, employee recognition receptions, annual faculty/staff picnics, new employee receptions, and holiday gatherings).

Under no circumstances may University funds be used for occasions such as employee birthdays, weddings, anniversaries, or other occasions of a personal nature.

Domestic Travel

1. If there are any personal days during your business trip, the number of personal days must be specified on the travel expense claim. Any personal expenses incurred in the trip will not be reimbursed.

2. Registration:

- Original receipt showing proof of payment.
- Your name must appear on the receipt.
- Name badge
- Conference registration fees can be prepaid using university funds. Please allow at least **one month** before the deadline for check processing.

3. Airfare:

- Internet package deals that include a combination of travel expenses purchased together (such as airfare and lodging) will **NOT** be reimbursed. The reason is that they do not breakdown the expenses and taxes as required by both the university and the IRS for reimbursement.
- Traveler should only use coach/economy class fare.
- Upgrades such as class, seat, extra legroom, priority boarding and early check-in, etc. are **NOT** reimbursable.
- If the airfare is being paid from a grant, you are required to book a flight on a U.S. flag carrier.
- Airfare can be prepaid using University funds by contacting the UCLA Travel Center, or submitting a request through **Concur** (the New Express System). You need to tell the travel agent that your airfare will be paid by your department via a Concur Request ID, provide the itinerary of your trip, and name and email address of your purchaser that will be handling the Concur ID. In order for the purchaser to process the Concur ID you need to provide the name of your PI, as well as the business justification (i.e. name of conference, meeting, etc.).

Phone: (310) 206-2639 or (800) 235-8252

Email: travel@finance.ucla.edu,

Online: <https://travel.ucla.edu/concur>

- Airfare purchased through the travel center includes traveler's insurance.

4. Meals:

- We will need your **itemized meal receipts**.
- The maximum meal reimbursement is \$62 per day.
- Reimbursement for meals of a trip that is LESS THAN 24 hours in duration is **NOT** reimbursable. Unless there is an overnight stay that is verified by a lodging receipt.

5. Lodging:

- Lodging is not reimbursable if the lodging site is within a 40-mile radius of the traveler's residence or office.
- An **original itemized receipt** is required showing proof of payment.
- If lodging arrangements were made on a travel website (such as expedia, orbitz, etc), the receipt must show the dates of travel, room rate and taxes as separate line items.

- If you are sharing a room, each roommate **MUST** pay for themselves. **Everyone** requesting reimbursement **MUST submit their own separate receipts**. In cases where only one original receipt is available, we will need a copy of the original receipt along with a signed note from the traveler stating this fact.
- Daily domestic hotel rates are capped at \$275 per night for trip within the lower 48 state, 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 should be performed at the time of booking.
 - UC's Hotel Program: UC has agreements with Marriott, Club Quarters, Wyndham Hotels and AirBnB. Further information can be found at <https://travel.ucop.edu/connexus/why-connexus/lodging>.
 - **AirBnB** for UC Traveler Guide can be found at <https://travel.ucop.edu/connexus/sites/default/files/UC-airbnb-for-work.pdf>
- **Federal funds are NOT allowed when eating or staying at the Luskin.**

6. Car Rental:

- Original receipt showing proof of payment.
 - Please note that insurance is **ONLY allowed outside the continental U.S.** UCLA has agreements established with the rental companies where car rental insurance is completely covered. Travelers or arrangers must book using the UCLA ID number to get the negotiated rate and decline all optional insurance. Cars may be booked through the UC Travel Center, online or via telephone direct to the rental agency.
 - Traveler should select an intermediate or smaller car.
 - Purchase of navigation devices and vehicle upgrades are **NOT** reimbursable.
- Car rental contract rate: <https://travel.ucla.edu/air-car-hotel/ground-travel/car-rental-contract-rates>

7. Parking fees, cabs, trains, etc:

- Will need your original receipts
- Tips should not exceed 20% of the transportation costs.
- Travelers are advised to use taxis, shuttles or other relatively inexpensive methods for transport to and from the airport.
- Private Car – Reimbursement for mileage on personal automobiles is only appropriate when the cost of the mileage is less than or equal to the cost of public transportation. The car used must be insured as prescribed by California law.

International Travel

1. If vacation days comprise over 50% of international trips in duration, the trip will be considered personal. UCLA will prorate airfare and other general expenses between vacation

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

2. Registration:

- Original receipt showing proof of payment.
- Your name must appear on the receipt.
- Name badge
- Conference registration fees can be prepaid using university funds. Please allow at least **one month** before the deadline for check processing.

3. Airfare:

- Internet package deals that include a combination of travel expenses purchased together (such as airfare and lodging) will **NOT** be reimbursed. The reason is that they do not breakdown the expenses and taxes as required by both the university and the IRS for reimbursement.
- Traveler should only use coach/economy class fare.
- Upgrades such as class, seat, extra legroom, priority boarding and early check-in, etc. are not reimbursable.
- Airfare can be prepaid using University funds by contacting the UCLA Travel Center, or submitting a request through **Concur** (the New Express System). You need to tell the travel agent that your airfare will be paid by your department via a Concur Request ID, provide the itinerary of your trip, and name and email address of your purchaser that will be handling the Concur ID. In order for the purchaser to process the Concur ID you need to provide the name of your PI, as well as the business justification (i.e. name of conference, meeting, etc.).

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- Airfare purchased through the travel center includes traveler's insurance.

4. Meals:

- Meal per diem is valid for **international** travel only. However, we will need your **itemized meal receipts**.

5. Lodging:

- An **original itemized receipt** is required showing proof of payment.
- If lodging arrangements were made on a travel website (such as expedia, orbitz, etc), the receipt must show the dates of travel, room rate and taxes as separate line items.
- If you are sharing a room, each roommate **MUST** pay for themselves. **Everyone** requesting reimbursement **MUST submit their own separate receipts**. In cases where only one original receipt is available, we will need a copy of the original receipt along with a signed note from the traveler stating this fact.
- Daily international hotel rates should not exceed 300% of the federal per diem guidelines. They are located at: https://aoprals.state.gov/web920/per_diem.asp.

- UC's Hotel Program: UC has agreements with Marriott, Club Quarters, Wyndham Hotels and AirBnB. Further information can be found at <https://travel.ucop.edu/connexus/why-connexus/lodging>.
 - **AirBnB** for UC Traveler Guide can be found at <https://travel.ucop.edu/connexus/sites/default/files/UC-airbnb-for-work.pdf>
6. Car Rental:
- Original receipt showing proof of payment.
 - Insurance is allowable for all foreign countries. UCLA has agreements established with the rental companies where car rental insurance is completely covered. Travelers or arrangers must book using the UCLA ID number to get the negotiated rate and decline all optional insurance. Cars may be booked through the UC Travel Center, online or via telephone direct to the rental agency.
 - Traveler should select an intermediate or smaller car.
 - Purchase of navigation devices and vehicle upgrades are **NOT** reimbursable.
- Car rental contract rate: <https://travel.ucla.edu/air-car-hotel/ground-travel/car-rental-contract-rates>
7. Parking fees, cabs, trains, etc:
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 - Travelers are advised to use taxis, shuttles or other relatively inexpensive methods for transport to and from the airport.

Traveler's Insurance

- All employees traveling on official University business and students traveling off campus for activities that are sponsored and supervised by the University are covered 24 hours a day under an expanded travel accident insurance policy. In addition to typical coverage for accidental death and dismemberment, the improved policy includes coverage for emergency medical evacuation, out-of-country medical expenses, loss of personal effects, security extraction and repatriation of remains.
- Registration forms and further information can be found at <https://www.ucop.edu/risk-services/loss-prevention-control/travel-assistance/>

Travel & Entertainment Card (T&E Card)

- If you paid or will be paying some of your expenses using the T&E card, please make sure to keep your itemized receipts as we will still need them.
- If you would like us to reimburse the card for those expenses, please indicate it in your reimbursement request.
- If you incur travel or entertainment expenses during the conduct of your business, you are eligible to obtain a T&E Card. You can submit a request for a new T&E Card through Concur.

If you would like to apply for a T&E Card, the procedure can be found at

<https://ucla.app.box.com/s/vfvwgb4zumk6eomtxpc0lze3hmvy5m4z>

- Certain expenses such as registration fees and airfare can be reimbursed before the trip, but only if purchased using the T&E Card.

Revised Travel Guidelines for Meetings, Meals & Events

1. Meetings, Meals, and Events:

UCLA departments are no longer required to obtain special COVID-related approvals nor complete checklists for meals, meetings or events (other than day camps, overnight camps, K-12 schools and mega events with over 5,000 attendees indoors or 10,000 attendees outdoors). **However, please refer to the [Los Angeles County order \(PDF\)](#) when holding any events.**

2. Travel:

UCLA employees must follow the [LACDPH travel guidelines](#) and corresponding mitigation measures, including mask wearing for all travelers and for those who are unvaccinated, testing before and after certain types of travel, as well as quarantining after returning from out-of-state travel. Managers and travelers should consider the impact of quarantine requirements at the destination location for work-related travel plans. Please note that travel no longer requires approval from a Dean, Vice Chancellor or Vice Provost, as has been required since last March.

State-funded Travel Restrictions

- There are 17 states where AB 1887 prohibits the use of state funds to pay for travel to a state on the Attorney General's list, except where one of the statutory exceptions applies. It does not affect travel that is paid for or reimbursed using non-state funds.
 - Alabama
 - Idaho
 - Iowa
 - Kansas
 - Kentucky
 - Mississippi
 - North Carolina
 - Oklahoma
 - South Carolina
 - South Dakota
 - Tennessee
 - Texas
 - Florida
 - Montana

- West Virginia
- Arkansas
- North Dakota

REMINDER

- **You have 21 days after the trip to submit your reimbursement.** Anything longer, will require a memo from you stating the reason for the delay. Failure to submit reimbursements on time could result in becoming **income reportable**.
- Please make sure that the PI signs the reimbursement request as we cannot begin the process without it.
- If you have any questions, please ask us before your travel.

Links

- Policies: <https://travel.ucla.edu/policies>
- Helpful Travel Planning Links: <https://travel.ucla.edu/air-car-hotel/helpful-travel-planning-links>

We understand that this might become a bit cumbersome, but travel policies have become stricter and unfortunately we have no control over them.

If you have any questions, please don't hesitate to ask us.

Thank you,

Biological Chemistry Business Office