

VC Research Travel and Working Meeting Guidelines

It is the policy of the University that all business travel shall be properly authorized, reported, and reimbursed in accordance with UC policy. Under no circumstances shall personal expenses be charged to, or be temporarily funded by, the University. 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.

All travel reimbursement requests should be submitted within 45 days of the travel or event. If submissions are made after 45 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.

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. "

Travel & Entertainment Card

Travel expenses that can be appropriately charged under the T&E Card:

- **Transportation** (Airfare, Car Rental, Local Transportation)
 - **AirFare** -- We encourage travelers to reserve their air travel as far in advance as possible, and no later than 2 weeks in advance of the departure date, through the new express tool, SAR® CONCUR®. This will minimize out-of-pocket expenses to the greatest extent possible.

Link attached with instructions on how to sign into the new express tool, SAP® Concur®, using your UCLA SSO. (<https://ucla.app.box.com/s/j0ta0lp2kw5v3obdcu2ye5zs5rppdft2>)

Update the personal information on your profile and add (ALL) Abhinav Ramesh, Aiza Almario and Guadalupe Romero as delegates.

Link attached with instructions on how to add delegates inside your SAP® CONCUR® profile. (<https://ucla.app.box.com/s/vn5m1gl0sydmylltmo3tt8ve7s26okwf>)

After the reservation(s) is placed please notify the OBFS office to start your airfare reservation process (email Abhinav and CC: Aiza Almario).

- **Rental Car** – Travelers are expected to use the University's preferred rental car vendors and request the UCLA discounted contract rate. The UCLA contract rate includes comprehensive insurance within the US. At the time of rental, UC employees should decline the Collision Damage Waiver (CDW), Loss Damage Waiver (LDW and Supplemental Liability (SLI) when renting a car for business travel within the US. Additional insurance purchased at time of, will not be reimbursed. For any questions regarding car rentals outside the US, please contact Abhinav Ramesh.

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- **Local/Public transportation** – Local/transportation fees (e.g, bus, taxi or train) are allowable for transportation to and from the airport/hotel/conference. Receipts need to be submitted to the OBFS office (emailed to Abhinav Ramesh and CC: Aiza Almario) as part of the reimbursement process. Tips are not to exceed 20% of the transportation cost. Transportation expenses for privately owned motorcycles or motor-driven cycles will not be reimbursed.
- **Lodging Expense** (No pre-paid lodging expense allowed)
 - Room rates for domestic hotels (within the Continental United States) should not exceed \$275 per night, before taxes and other 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. The price comparisons should be performed at the time of booking.
 - Reimbursement is based on actual expenses incurred, and additional justification may be requested if the room rate is above the average for the local area.
 - Original, ***itemized receipts*** for all lodging expenses as well as any working business meeting expenditures included in the lodging claim are required for reimbursement.
 - As per [Policy G-28](#), Lodging is not reimbursable if the lodging site is within a 40-mile radius of the traveler's residence or office. Transportation over 40 miles is also not reimbursable

It is important to note that travel packages from internet vendors such as Expedia and Orbitz typically do not itemize expenses. Therefore, no business-related travel should be booked through such vendors unless the traveler confirms in advance that airfare, hotel, and rental car will be itemized separately. Travel packages that are not itemized will not be reimbursed.

Exemption from Occupancy Tax

As a general rule, University employees traveling on official University business are exempt from payment of occupancy taxes imposed by certain California cities or counties on rental rooms. **To avoid misunderstandings, travelers should identify themselves as University employees and claim exemption from the tax when checking into the hotel.** However, occupancy tax ordinances in a few California cities do not authorize exemptions for University employees.

Travel Paid Directly by the Traveler

The cities of Los Angeles, Costa Mesa, Santa Ana, Irvine, Newport Beach, Del Mar, Riverside, Coronado and Oakland provide exemption to University travelers who pay hotel room charges directly, upon completion of a city form or a certificate of exemption for governmental agencies.

Travel Billed to and Paid Directly by the University

The cities of San Francisco and San Diego grant an exemption from such taxes, only if hotel room charges are billed directly to the University.

The traveler may complete an exemption certificate if one is required. The certification notice can be downloaded from the following link; [Occupancy Tax Exemption](#)

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Travel of Less than 24 Hours -- When the entire length of a trip is **less than 24 hours**, meals and incidental expenses **cannot be reimbursed** unless the travel includes an "overnight stay" as supported by a lodging receipt. An exception to the overnight-stay requirement **may** be allowed when a traveler incurs a meal expense in connection with a business meeting (e.g., a working lunch scheduled as an integral part of a meeting or conference). The business purpose of the meal must be explained or substantiated by other documentation (e.g., an agenda), which should be attached to the Voucher. Reimbursement for the cost of the traveler's meal is allowed up to the maximum amounts set by UC policy.

- Meals and Incidentals
 - Reimbursement will be based on the actual amount the traveler paid while on University business, subject to a limit for each full day on travel status. Current limit, for domestic travel, is \$62/day. Please note this is not a per diem. The limit includes tips and fees for services (i.e. for waiters, baggage handlers, etc)

Working Meetings

Reimbursement for meals for virtual events are not allowed under UC's Travel & Entertainment [Policy BUS-79](#), which requires an in-person meeting. The University pays for meals when groups gather together in-person at a UCLA-related event. However, when participating in a virtual meeting or event, the attendees are not taking part in an in-person event.

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MAXIMUM RATES FOR MEALS AND LIGHT REFRESHMENTS

Breakfast	\$31.00
Lunch	\$54.00
Dinner	\$94.00
Light refreshments	\$22.00