Policies and Procedures for MyEvents & MyTravel

Nancy Herbst
January 16, 2015
MyEvents
The MyEvent Process

Welcome

Use MyMeetings and Hosted Events (MyEvents) to claim expenses for business entertainment, a meeting, or certain other university sponsored events:
- Reimburse an employee as a host or meeting / event coordinator
- Reimburse the Travel Card of an employee as host or meeting / event coordinator
- Issue a payment or deposit directly to a vendor / merchant

Catering an event? Avoid delays in processing your MyEvents payment by ensuring your catering contract has been signed by Procurement and Contracts or you have received a PO C####- iRequest via Marketplace. Visit How to Engage a Caterer or Restaurant for an Event.

GET STARTED
- Create a new document
- View or edit an incomplete document
- View or edit an incomplete deposit document
- View a completed document
- Help / Getting Started
- Contact the UCSD Travel and Entertainment Team
- Admin Tools
Event Type

MYMEETINGS & HOSTED EVENTS » EVENT TYPE

Step 1: Event Type

Event Type

What is the nature of this Event?
Please select the business nature for the event from one of the seven types.

- HOSTING Guests, Functions, See categories
- MEETING Employees, others. On UCSD Premises, See categories
- CELEBRATING Employee Appreciation, Morale, See categories
- ATTENDING Community Events, Fundraising, See categories
- EXTENDING Hospitality, See categories
- PROVIDING Work, Program Related Meals, See categories
- SPONSORING Student Events, Occasions, See categories

Clicking on the nature of an event will automatically move you onto the next screen.

Click the "See categories" link to help you determine if the Event Type you are considering is the best choice.

Previous Save and Exit Next
Event Type

Was the event held on campus?

Yes

Was there alcohol served or the event was social or recreational in nature? (1)

No

Use Meeting Event Type

Yes

Use Hosted Event Type

No

Was it in connection with full-day meetings held at a conference center with a venue fee?

Yes

Use Hosted Event Type

No

Use Hosted Event Type

(1) Social or recreational in nature events may include, for example:
- Taking an invited speaker or visitor to lunch at the Faculty Club in lieu of an honorarium
- A social hour or mixer event
- Recruitment meals with prospective graduate students and faculty/staff
# Event Type

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Examples</th>
</tr>
</thead>
</table>
| MEETING Employees, others. On UCSD Premises  
  - Administrative, planning, workgroups  
  - Planning, mentoring, workgroups (Faculty, Staff, UCSD students)  
  - Formal training sessions  
  - Professional association, scholarly society, external organization  
  - UC-wide meetings, Academic Senate, Regents  
  
  *Meal over the CPP requires special entertainment approval*  
| Grant project discussions  
  Lab meeting  
  Research collaboration within UCSD  
  Mtg space like hotel conference room can be meeting  
  
  *(If alcohol is served, needs to be hosting)* |
| HOSTING Guests, Functions  
  - Donor, donor cultivation  
  - Prospective academic or administrative appointee  
  - Reception by invitation  
  - Recruiting graduate student, student athlete, scholar  
  - Visitor, official guest (person or organization)  
  
  *Spouse/partner participation or over CPP requires special entertainment approval*  
| Dinner to discuss donor prospects  
  Dinner to discuss research and seminar  
  Recruitment lunch  
  Dinner with research group following a lecture  
  Research collaboration with others outside of the University  
  UCSD employees gathering off-site (at a restaurant or private residence)  
  
  *(Host needs to be present)* |
# The Event Type

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Examples</th>
</tr>
</thead>
</table>
| **CELEBRATING Employee Appreciation, Morale**  
  • Appreciation, recognition, length of service  
  • Employee morale group event, holiday party, picnic  
  • Retirement, farewell  
  *All require special entertainment approval*  | Welcome celebration to introduce new faculty member to support staff  
Lunch celebration of recruitment project completion  
Department holiday celebration |
| **ATTENDING Community Events, Fundraising**  
  • Fundraising events (including **purchase of tables**)  
  • Tickets to sporting, theatrical, musical event  | Tickets to IMAX encourage std part in science & tech program  
*SD Business Journal Women Who Mean Business*  
Golf |
| **EXTENDING Hospitality**  
  • Open house  
  • Reception, open invitation to general public community  
  • Visitor  
  *Spouse/partner participation or over the CPP requires special entertainment approval*  | Opening reception for an exhibition  
Department open house  
Library book club meeting  
La Jolla Del Sol apartments extending for community building events |
The Event Type

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROVIDING Work, Program Related Meals</td>
<td>Educational conference Lunch provisions for research subjects Journal Club <strong>NOT for a meeting that is held during the lunch hour</strong></td>
</tr>
<tr>
<td>• Employee on-the-job meals (no part list required)</td>
<td></td>
</tr>
<tr>
<td>• Grand rounds (Medical Center) (no part list required)</td>
<td></td>
</tr>
<tr>
<td>• Volunteers and research subjects (no part list required)</td>
<td></td>
</tr>
<tr>
<td>SPONSORING Student Events, Occasions</td>
<td>Gathering for graduate students Quarterly social event/social hour Graduate students taking speaker out to discuss seminar. Tickets for zoo, boat excursions, field trip related activities for students remain on sponsoring, not attending.</td>
</tr>
<tr>
<td>• Athletic team, training, game related (at home, no travel)</td>
<td></td>
</tr>
<tr>
<td>• Continuing education, self-supporting programs</td>
<td></td>
</tr>
<tr>
<td>• Gatherings, awards banquets, or meeting stds (only) (no part list required)</td>
<td></td>
</tr>
<tr>
<td>• Orientation, commencement (no part list required)</td>
<td></td>
</tr>
<tr>
<td>• Speaker – Student (637592)</td>
<td></td>
</tr>
</tbody>
</table>
If more than one MyEvent is being processed for a single event, be sure to cross-reference the other event number(s).

When multiple MyEvents are required, also attach a ‘general’ budget so approvers can reasonably determine the anticipated per-person meal expense.

Please be careful with those acronyms!
## The Business Purpose

<table>
<thead>
<tr>
<th>Solid event description</th>
<th>Weak event description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly fund manager meeting to discuss actuals against budget and year-end forecasting.</td>
<td>Monthly fund manager meeting</td>
</tr>
</tbody>
</table>
| Hosted dinner with guest speaker to discuss student feedback and industry trends focused on the course.  
Or  
Hosted dinner with guest speaker prior to presentation to discuss logistics.  
Or  
Hosted dinner with guest speaker to discuss participant feedback to presentation. | Hosted dinner with guest speaker |
| Monthly Coleman lab meeting to discuss research findings from X and Y projects and to review Smith’s presentation. | Monthly Coleman lab |

Agenda may be attached to document business purpose
Describing the Participants

For multiple participants, you can upload a sign-in sheet, Excel file, etc.

REMINDER: Be sure to include the title and company affiliation.
Ex: Nancy Herbst, Travel Manager, UCSD

Research subjects can include first name and last initial
Ex: Nancy H, Research Subject
UCSD does not reimburse employees for frequent or routine expenditures for meals or light refreshments as they're considered taxable income by the IRS.

For meetings and entertainment events, limit:

• Meals to once per month, per group
• Light refreshments to twice per month, per group

While MyEvents asks the “frequency” question only for Meeting types, the limitations also apply to Hosted events.
The Business Purpose

Spouses in attendance
- Donor activities
- Recruiting – if the spouse of the candidate is in attendance
- When the spouse works at UCSD
  - Role is considered “employee” when attendance is that of an employee

Exceeding the Per-Person Maximum Cost
- The request must document the circumstances that were unavoidable or necessary to accomplish the University business purpose
What is the per person maximum for light refreshments? $18
What is the per person maximum for breakfast? $26
What is the per person maximum for lunch? $45
What is the per person maximum for dinner? $78
Per Person Meal Maximums

Remember those per-person meal maximums!

- You must provide a written justification if expenses exceed the per-person meal maximum, including reasons why the higher costs were unavoidable and necessary to achieve a business purpose.
- *If* it exceeds 200% over the limit, the event must be approved by the Chancellor.
- The per-person meal expense is for the entire event:
  - Includes pre-meal items (*e.g.*, beverages and hors d'oeuvres), meal, labor, sales tax, delivery charges, and other service fees
  - Does not include room rental, setup fees, media rental fees, decorations, and other non-meal expenses (list these under “Other”).
Choosing a Payment Option

- The system will auto populate Host’s name.
- If vendor, select Business/Entity in the payee search field.
- Indicate the invoice number if paying a vendor.
But remember....

Faculty and staff morale-boosting functions, such as appreciation, recognition, length of service, retirement, farewell, picnics or holiday gatherings, must serve a UC San Diego business purpose and can be approved as special entertainment if costs are:

- Limited to only the employees in attendance
- Permitted under the fund source

And the event should be....

- Cost effective
- In accordance with the proper use of public funds
- Directly associated with the conduct of official UC San Diego business
- In service of a clear UC San Diego business purpose with no personal benefit derived by either the official host or attending employees
Account Code Options

Step 5: Accounting

Accounting Distribution

Accounting distribution must total $15.00

<table>
<thead>
<tr>
<th>Index</th>
<th>Account Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>BFXXXX</td>
<td>Meals - Business Events</td>
<td>$15.00</td>
</tr>
<tr>
<td>637250</td>
<td>Meals - Business Events</td>
<td></td>
</tr>
<tr>
<td>637250</td>
<td>Meals - Business Events</td>
<td></td>
</tr>
<tr>
<td>637250</td>
<td>Meals - Business Events</td>
<td></td>
</tr>
<tr>
<td>637250</td>
<td>Meals - Business Events</td>
<td></td>
</tr>
<tr>
<td>637250</td>
<td>Meals - Business Events</td>
<td></td>
</tr>
</tbody>
</table>

Total: $15.00

Other Attachment

Optionally attach any other documentation to this event.

You can attach a PDF, Word, Excel, or text file.

Account code should coincide with event nature and approval routing.
The Final Product

Step 7: Review & Submit

**STEP 1: EVENT TYPE**
- Document Reference Number: GAO0000097
- Event Type: Hosting
- Business Purpose: Visitor, official guest (person or organization)

**STEP 2: EVENT INFORMATION**
- Event Date: 09/02/2013
- Event Location: Sammy's Pizza
- Event Status: Incomplete
- Event Description: Staff Quarterly meeting to discuss new funding opportunities. Update new staff on procedures. Prepare for upcoming budget deadlines.
- Host: COLEMAN, SALOME
- Alcohol expense claimed?: N

**STEP 3: GUESTS**
- Participant Count: 2
- Did a spouse or partner attend the event?: N
- Participant file attachment: DSC03379.jpg

**STEP 4: PAYMENT**
- Payment type: Reimbursement
- Lunch Expense Amount: 15.00
- Total Expense Amount: 15.00

**STEP 5: ACCOUNTING**
- Distribution Amount: $15.00

<table>
<thead>
<tr>
<th>Index</th>
<th>Fund</th>
<th>Account</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>DF5007CC</td>
<td>69750A</td>
<td>637250</td>
<td>$15.00</td>
</tr>
</tbody>
</table>

**STEP 6: APPROVALS**
- Approval for this document, including the host/meeting coordinator, can log into MyApprovals to view and take action (the approval email request does not need to be resent).

<table>
<thead>
<tr>
<th>Preparer</th>
<th>Approval Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLEMAN, SALOME</td>
<td></td>
</tr>
<tr>
<td>Host</td>
<td></td>
</tr>
<tr>
<td>COLEMAN, SALOME</td>
<td></td>
</tr>
<tr>
<td>Fund Manager</td>
<td></td>
</tr>
<tr>
<td>McDORRIT, DAWN</td>
<td></td>
</tr>
<tr>
<td>SMITH, LASHON W</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
</tr>
<tr>
<td>SMITH, LASHON W</td>
<td></td>
</tr>
<tr>
<td>MOON, KELSEY D</td>
<td></td>
</tr>
<tr>
<td>UCSD Travel and Entertainment Team</td>
<td>Approval Date</td>
</tr>
<tr>
<td>COLEMAN, KIMBERLY E</td>
<td>Approval Date</td>
</tr>
</tbody>
</table>

Approval Template INV / EN2 was used to choose the Fund Manager Approver.
Approval Template INV / EN2 was used to choose the Entertainment Approver.

By clicking the “I Agree” button you are certifying that:
- The expenses are for official University business
- The expenses were incurred on the date(s) indicated
- You have provided receipts for each expense $75 and greater.

[Previous] [I Agree]
Hosting at a private residence

- Consider the amount of personal risk the host will need to accept
- Invitation needs to reflect that UCSD is hosting the event
- Follow IRS policy when making payment for services to individuals such as servers or cooks.
- Remember that payment for these services is considered income to the recipient and must be reported to the IRS for tax purposes.
- Collect names and Social Security numbers of recipients of payments for personal services.
- Contact Jon Schmidt, Director of Risk Management (x43782) or by email to learn about potential risk and ways in which to minimize it.
**Special Considerations**

**Attending community events and fundraisers**

- Documentation must breakout the “meal” from the “donation”
- If the individual pays directly, then s/he can only be reimbursed the amount of the “meal”
- If paying by Travel Card, the payment must be sent with the transmittal memo and the receipt should reflect UCSD as the payee
  - Reimbursements to the Travel Card through MyTravel must include the transmittal letter and receipt (if available)
- If paying by check, the transmittal letter must be uploaded in MyEvents
Receipts

- Expenses of $75 or more must be supported by ‘original’ itemized receipt.
- If the expense being claimed exceeds $75 but is comprised of two receipts, each less than $75, the receipts are required.
- Lost receipts need to include a description of what steps the host/department did to obtain a duplicate receipt and what is being done to avoid future lost receipts.
- If a credit card statement is being submitted when the receipt is lost, redact the credit card number, home address, and personal purchases.
Catering

Catering Contracts

Don’t forget that catering vendors must have a contract signed by Procurement and Contracts or a PO CN# prior to the event and prior to submitting them through MyEvents for payment/deposit.
Updates
Travel

Submit MyTravel and MyEvents claims by December 12 to have expenses included in the 2014 calendar year.

The Travel and Entertainment Team is pleased to announce that it is offering classes via UC Learning! We look forward to seeing you.

Do you need to...
- Ask a question
- Apply for a Travel Card
- Preauthorize travel
- Book travel
- Claim travel expenses
- Claim meeting & entertaining expenses

Subscribe to travel news

Top 10
- Receipt requirements
- Mileage rates
- Calculating per diem
- Fly America Act
- Renting a car
- Meals for domestic travel
- About MyTravel
- Business travel insurance
- MyEvents: event examples
- About Connexxus
### Updates

<table>
<thead>
<tr>
<th>Meetings and Entertainment</th>
<th><strong>Current Policy</strong></th>
<th><strong>Policy effective 1/1/15</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>If using a UC San Diego Travel Card, it is recommended that expense reimbursements be submitted within 10 days of the event to ensure timely payment to US Bank. If personal payment was used, it is recommended that expense reimbursements be submitted within 21 days to reduce any financial burden on the employee. Expenses should be submitted within 60 days. Expenses submitted after 60 days but before six months should include an explanation as to why the event was not submitted within six months.</td>
<td>If using a UC San Diego Travel Card, it is recommended that expense reimbursements be submitted within 10 days of the event to ensure timely payment to US Bank. If personal payment was used, it is recommended that expense reimbursements be submitted within 21 days to reduce any financial burden on the employee. Final reporting of expenses must be submitted via MyEvents within 45 days of the event. Final reporting of expenses submitted via MyEvents after 45 days may be treated as taxable and reported on the employee’s W-2. (Employees should consult with their tax professional as to whether the expense can be deducted on their individual tax return.)</td>
</tr>
</tbody>
</table>
Updates

What we are doing to assist with the reduced time to submit expenses?

1. Hosts will receive a reminder email to approve the event every eight days until the event is approved. (Currently, only one email is sent to the host with no reminders.)
2. Electronic approvals will be requested simultaneously instead of sequentially (moving from host, to fund manager, to entertainment approver, etc.).
Updates

What we are doing to assist with the reduced time to submit expenses?

3. “Event Description” will be reworded with “Business Purpose” and a link providing examples of strong and weak descriptions will be provided.
Updates

What we are doing to assist with the reduced time to submit expenses?

4. Ability to track error rates by department to offer customized training.
Did you know?

We process approximately 24,000 events a year.
That’s almost 500 events a week!
And our team is comprised of 2 Entertainment Specialists
• Sali Coleman
• La Shon Smith
MyTravel
THE TRIP PREAUTHORIZATION PROCESS

• From your MyTravel homepage, click on ‘Create a new trip’
• Click on ‘Search for Traveler’ and, using the traveler ID, look up your traveler
## THE TRIP PREAUTHORIZATION PROCESS

### Create a new trip

Enter the requested information and click Submit. All fields are required.

<table>
<thead>
<tr>
<th>Travel preparer</th>
<th>Available actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: MADAHAR, SHAMA NIKHIL</td>
<td>- Return to travel home</td>
</tr>
<tr>
<td>Email: <a href="mailto:smadahar@ucsd.edu">smadahar@ucsd.edu</a></td>
<td>- Connexxus - book airfare [Go]</td>
</tr>
</tbody>
</table>

### Traveler Search

Search by one of the following:
- Name (Last, First)
- Traveler Id
- Employee Id

Note: When the results come back you can view each traveler's address list by clicking on the plus icon.

![Image of the travel preauthorization process](image-url)
THE TRIP PREAUTHORIZATION PROCESS

Type of Trip

- Individual – 1 traveler
- Group – 3 or more travelers, outbound on a trip
- Move/House-hunt/Temporary Housing – For moves and house-hunting trips
- Recruitment – Candidates coming to UCSD for interviews
DESCRIBING THE PURPOSE

A business purpose should be clear to approvers familiar with the event as well as someone reviewing it who is not familiar with the event would have no questions as to the circumstances under which the travel occurred. It should be clear that it was necessary, reasonable, and primarily benefited UC San Diego.
DESCRIBING THE PURPOSE

Have the purpose of the trip include a description that makes it clear for the traveler type. For example, why is a non-employee attending a conference?

Agenda or other supporting documentation (conference brochure, invitation letter, etc.) should also be attached in support of the business purpose.

<table>
<thead>
<tr>
<th>Solid Purpose</th>
<th>Weak description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual/Other: Attend the ABC Conference as subcontractor under UCSD XYZ</td>
<td>Attend conference</td>
</tr>
<tr>
<td>grant.</td>
<td></td>
</tr>
<tr>
<td>Individual/Other: Presenter at UCSD’s ABC Conference</td>
<td>Attend conference</td>
</tr>
</tbody>
</table>
Can a spouse/partner’s travel be reimbursed when joining a recruitee for an interview?

**Yes and No**

- Spouse’s travel may be reimbursed for the *final* interview only
- Special approval by the vice chancellor is required for a spouse to accompany a candidate for faculty or high-level administrative positions (including Manager and Senior Professional positions) on final interviews
- This approval may be in the form of a letter or email that is to be uploaded to MyTravel
- Children accompanying a candidate may be reimbursed but will be treated as taxable (VC approval required)
THE TRIP PREAUTHORIZATION PROCESS

Approval Routing

- Pick an approval routing template created for you by your DSA
THE TRIP PREAUTHORIZATION PROCESS

- Hit Submit and you see a message with the trip number
- The trip is now in your dept. approver’s MyApprovals queue, pending pre-authorization
- Click on ‘View Audit Trail’ for the trip from your homepage to see the trip’s routing

Trip 00867989 created successfully
- Click here if you have attachments to add
- Click here to return to travel home

**Trip authorization**

<table>
<thead>
<tr>
<th>TRP / AAA / QA trip preauth</th>
<th>1. GAOKEC - Coleman, Kimberly E.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>GAOLWS - Smith, Lashon W.</td>
</tr>
<tr>
<td></td>
<td>GAOSCO - Coleman, Salome</td>
</tr>
<tr>
<td></td>
<td>GAOSNM - Madahar, Shama N.</td>
</tr>
</tbody>
</table>

Approved on 09/05/2013 02:15 PM
THE TRIP PREAUTHORIZATION PROCESS

- After your dept. approver pre-authorizes the trip, the trip status will change to ‘pending completion’ and you will have a ‘claim expenses’ option under the Actions column.
- Use this option, after the completion of the trip, to reimburse the traveler.
PROCESSING PREPAYMENTS

- From your MyTravel homepage, select ‘Create prepayment’ for your traveler’s trip
- Select the payment type
- Complete all of the fields, select an approval routing template, and hit submit

<table>
<thead>
<tr>
<th>Trip</th>
<th>Traveler Name</th>
<th>Description</th>
<th>Dates</th>
<th>Due</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
</table>
| 00867988 | MADAHAR, SHAMA NIKHIL  | TESTING MEETING   | 08/01/2013 to 08/07/2013 | 08/28/2013 | Pending Completion       | View
|          |                        |                   |                   |           |                         | Create prepayment        |
|          |                        |                   |                   |           |                         | View audit trail         |
|          |                        |                   |                   |           |                         | Claim expenses           |
|          |                        |                   |                   |           |                         | Attachments               |
Payment type

- Travel Card: used to prepay your travel card
- Service Fee: used to prepay taxi, shuttle, buses
- Hotel Deposit: used to prepay hotel
- Registration Fee: used to prepay conference registration
- Cash Advance: used for meals and ground transportation only (remote locations)
What is the prepayment type you would choose for car service?

Service Fee

- Prepayment will show up under “Air” tab when reconciling.
- Include notes that the amount was for prepaid car service.
- Requires a receipt!
  - Upcoming enhancement will offer a ground option
CLAIMING EXPENSES

- After the completion of the trip, click on ‘claim expenses’ to reimburse the traveler
- The first tab is the ‘Start’ tab – fill out the trip details here
Do not enter any UCSD prepaid airfare amounts. They will show under ‘UCSD Prepaid’ and in the total of airfare.
EXPENSES – “MOST ECONOMICAL”

Early Bird Check-Ins

• Needs to have a business purpose
  o Not being around a computer at the 24-hour mark does not qualify
  o Example: There are 30-minutes between flights and a need to debark a plane quickly to catch connecting flight

• Medical certifications may not qualify for early bird check-ins when the airline will accommodate pre-boarding needs
  o Height/size does not qualify for the need for special seat assignment (personal preference) unless there is a medical condition and certification.

• Seat assignment fees are treated as early bird check-ins
Using Private Vehicle instead of most economical options (flight)

- Total cost of surface transportation cannot exceed the equivalent lowest cost airfare plus local transportation to and from terminals. Total cost of surface transportation may include:
  - Meal or lodging, if a minimum of 300 miles per day are traveled by the most direct route
  - Parking, tolls, taxis and/or ferries
Comparable Flights

- Needs to be obtained at the time the original option chosen
- Should include several examples
  - Example: Claim that it is cheaper to fly into LAX and use a private car to San Diego instead of flying into San Diego.
  - Example: Decision to drive to San Francisco instead of flying
- Cannot be a “fully refundable” ticket
• UCSD is committed to providing services to assist faculty or staff members who become unable to perform assigned duties of their position because of a disability
• Medical certification is valid for one year
• The medical certification should not include the medical diagnosis of the traveler
• Should include the type of work restrictions
• Travel assumes that the department and the traveler have undergone the job accommodation interactive process and the requested travel accommodations have been determined to be reasonable
• Use the drop down menus to pick day and type of ground expense(s)
• If claiming mileage, enter miles towards the bottom of the page. The system will calculate the amount based on the current mileage rate
MILEAGE

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mileage, general</td>
<td>56.5¢</td>
<td>56¢</td>
<td>57.5¢</td>
</tr>
<tr>
<td>Mileage for moves</td>
<td>24¢</td>
<td>23.5¢</td>
<td>23¢</td>
</tr>
</tbody>
</table>

MyTravel will automatically apply the new rates based on trip start date. Accordingly, mileage reimbursements that cover multiple years should be broken out into separate MyTravel claims.

The Mileage Reimbursement Rates page and Sample Mileage Log in Blink has been updated to reflect the changes with separate worksheets for each year.

Remember: Each leg of the trip must include a business purpose, including, for example, topics discussed.
## SAMPLE MILEAGE LOG

<table>
<thead>
<tr>
<th>Date only</th>
<th>From</th>
<th>To</th>
<th>Round Trip (Y/N)²</th>
<th>Total Miles</th>
<th>Business Purpose³</th>
</tr>
</thead>
<tbody>
<tr>
<td>9500 Gilman, La Jolla, CA</td>
<td>4168 Front St, San Diego, CA</td>
<td>Y</td>
<td>24</td>
<td>To attend weekly meeting with MSO. Topics discussed included strategic planning.</td>
<td></td>
</tr>
</tbody>
</table>

**Total miles traveled:** 0

**Total amount to be reimbursed:** $0.00

Calculated at the 56 cents per mile rate effective 1/1/14

I certify that the above is a true statement of the travel expenses incurred by me in the service of the University of California during the date(s) shown on the face of this claim, that all items were for the official business of the University of California, and that the vehicle used was covered by the minimum liability insurance required by university travel regulations.

Signature: __________________________ Date: __________________________

Typed Name

---

1. Recommend that mileage logs be submitted on a monthly (preferred) or quarterly basis. (Consider fiscal year deadlines.)
2. If this entry represents a round-trip entry, put the total miles of the round trip (there and back) under “total miles.”
3. Indicate the specific official business purpose served for each instance. For example, “business meeting” does not meet the requirement unless you include a brief description of the topics discussed.
Private cars

• The purpose for a private car (limo) needs to address why other, more economical options, were not used
  o Car rental
  o Shuttle service
• If used for a full day(s), provide an agenda reflecting the traveler’s schedule and need for such transportation
Enter the nightly rate (incl. tax) for each day (even if the hotel was prepaid)

Prepaid hotel amount will be reflected next to the ‘hotel total’ and at the ‘review and submit’ tab
**CLAIMING EXPENSES – MEALS**

Use the drop down menu to pick day and enter the meals amount for that day.

<table>
<thead>
<tr>
<th>Day</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose a Day ▼</td>
<td></td>
</tr>
<tr>
<td>Add another day</td>
<td></td>
</tr>
</tbody>
</table>

**Are these the actual meal expenses?**
- Yes
- No

For meals and incidentals (such as tips), claim only the actual amount spent per day. Do not claim:
- The maximum allowable of $71 unless you exceeded the amount or spent exactly $71 that day and will enter an explanation in the notes section below *
- Any non-business portion of meal expenses
- Any meal covered by a registration fee
- Any entertainment expense

* Claiming $71 per day for all travel conditions is incorrect use of meals and can trigger a taxable event for the traveler.
What is the maximum meals & incidental expenses (M&IE) per day?

(HINT: It was just on the previous slide. Did you see it?)
CLAIMING EXPENSES – PER DIEM

- Hotel and Meals tabs are not available for such trips; use the ‘Per Diem’ Tab
- Click on ‘Foreign Search’ to pick a location
- Note: the ‘number of days in this location’ prepopulates with a number based on the dates and time of travel entered at the start page
CLAIMING EXPENSES – PER DIEM

- Selecting the city and country will prefill the amounts in the per diem tab for that location
- Do not change anything if claiming 100% per diem
- Must claim actuals if using federal funds
- Adjust the per diem rate for meals and/or lodging if claiming actual expenses that are less than allotted per diem
CLAIMING EXPENSES – PER DIEM

If claiming more than per diem for lodging, what “extra” steps must you do? (Hint: There are two of them.)

1. Provide the business purpose as to why other “more economical” choices were not appropriate.

2. Attach receipts evidencing “actuals.”
CLAIMING EXPENSES – REGISTRATION

- Answer ‘Yes’ if you have registration expense to claim or ‘No’ to move to the next tab
- Do not enter any UCSD prepaid registration amounts. They will show under ‘UCSD Prepaid’ and in the total of registration

Expense Type | UCSD Prepaid | Traveler Paid
--- | --- | ---
Registration | 0.00 | 
Training | 0.00 | 

*If optional, non-business fees, or special event costs were included in the prepayment, please enter the amount below. This amount will be subtracted from the total registration fee.*

Less Non-Business Registration

Were meals included in the Registration amount?  
☐ Yes  ☐ No

Registration Total  
$0.00

Registration Notes
CLAIMING EXPENSES – MEALS

If attending a local conference, can you claim meals?

No. Meal costs can be claimed only for travel longer than 24 hours and that required lodging.
LOCAL CONFERENCES

Use MyTravel for local conferences

- Travel Card to be used for conferences
  - Prepayments available if the traveler does not hold a travel card
- An expense for lodging within the vicinity of your home or headquarters is generally not eligible for reimbursement unless an early start time is combined with a distance greater than 40 miles
- IRS Taxable Fringe Benefit Guide specifically excludes meals unless the traveler is away from his or her home overnight as supported by a lodging receipt
CLAIMING EXPENSES – OTHER

- Use this tab to claim other expenses such as internet access, ATM fees, visa fees, etc.
Laundering
• Only available if trip exceeds six days

Currency Converters
• Attached with receipts
• Converted as of the day of purchase (ideal)
This is the total of all the expenses for this trip

Any prepayments and/or advances for the trip will be deducted here

List the amount to be paid directly to the traveler’s travel card here

This is the reimbursement amount to the traveler

Ensure the index(es) and amounts match the total amount for this trip

Use Summary notes for any explanation or additional information about the trip
**CLAIMING EXPENSES – REVIEW & SUBMIT**

Need to see any prepayments or their status?

### Active trips

<table>
<thead>
<tr>
<th>Trip</th>
<th>Traveler Name</th>
<th>Description</th>
<th>Dates</th>
<th>Due</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>00902164</td>
<td>WOHLRAB-HERBST, NANCY L</td>
<td>GBTA CONVENTION 2014</td>
<td>07/26/2014 to 07/30/2014</td>
<td>08/20/2014</td>
<td>Pending Completion</td>
<td>View, Create prepayment, Claim expenses, Attachments</td>
</tr>
</tbody>
</table>

### Payments

<table>
<thead>
<tr>
<th>Document</th>
<th>Type</th>
<th>Amount</th>
<th>Payee</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>T0902164</td>
<td>Travel Card</td>
<td>$995.00</td>
<td>US BANK</td>
<td>Completed</td>
<td>View Authorization, View Document Text, View Check Text</td>
</tr>
</tbody>
</table>
CLAIMING EXPENSES – REVIEW & SUBMIT

- Click on ‘Add an attachment’
- Use ‘Receipts Attachment’ type for all required receipts
- Use ‘Wire Request Form’ type when attaching a wire form for reimbursement

You're responsible for securing personal information (PI). Do not include PI, including home address and phone numbers, credit card numbers, medical conditions, social security numbers, birth dates, etc.
You're responsible for securing personal information (PI). Do not include PI, including home address and phone numbers, credit card numbers, medical conditions, social security numbers, birth dates, etc.

Add an attachment

Type: Choose one...

Attachment: [Browse...]

Description: [ ]

[Cancel] [Add attachment]
NEED A RECEIPT?

• Argh! The system is telling me that I cannot submit because there are receipts missing – BUT THEY ARE ATTACHED!

Make sure at least one of your attachments are identified as a “receipt” and not just a “trip” attachment.
WHAT TO DO IF THERE IS A LOST RECEIPT?

- Describe the steps the department/traveler has done to try to get duplicate receipt(s) from vendor(s)
- What will the traveler/department do to avoid it from happening in the future
- Redact credit card statements to remove account numbers, home addresses, and personal purchases

Stay away from those “package” deals!
This page summarizes all of the expenses and charges to the index for this trip.

Click on ‘I Agree’ to certify the trip as preparer.

This will generate an email with a link to the traveler (employee only) requesting their certification.

After the traveler certifies, an email will be generated to the dept. approver for final approval of this trip.
APPROVAL PROCESS

- Preparer submits

- Traveler certifies if UCSD employee

- Final Departmental Approver
  - If trip is considered “low risk,” trip will “self approve” after seven days

- Travel Department
  - Not all trips are reviewed by the Travel Team
TRAVELER CERTIFICATION EMAILS

Yes, the email is the only way a UCSD Employee traveler can certify a trip.

No, the travel office cannot regenerate the email to the traveler for certification. But, a reminder email goes to the traveler every 8 days.

Also, preparer can go into the email defaults for the trip and resend the email.

Email Defaults for Trip 00968962

<table>
<thead>
<tr>
<th>Available actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Return to travel home</td>
</tr>
</tbody>
</table>

⚠ Changes to email settings will be applied to this trip only.

| Email to employee traveler after trip has been created and before it is preauthorized | ○ Yes | ○ No |
| Email to department approver(s) requesting preauthorization of trip | ○ Yes | ○ No |
| Email to preparer after trip has been preauthorized | ○ Yes | ○ No |
| Email to employee traveler after trip has been preauthorized | ○ Yes | ○ No |
| Email to department approver(s) requesting approval of prepayment | ○ Yes | ○ No |
| Email to preparer after Travel Team approves prepayment | ○ Yes | ○ No |
| Email to employee traveler to certify trip | ○ Yes | n/a |
**Benefits to UC San Diego**

Ensure that the anticipated benefits outweigh the costs. You might explore alternatives that would be equally effective in accomplishing the desired objectives. *(I.e., private car service versus car rental.)*

- The expenses are lavish or extravagant for the type of travel.

**Tax issues**

- The travel is not directly related to the employee's job or otherwise qualifies as a UC San Diego business expense.

This is why the “purpose” description is so important and why there has been some “refining” of procedures.
Enhancements!
ENHANCEMENTS

Canceling Trips (current)
The preparer can cancel all trips as long as there are no prepayments requested or issued

Customizing Email Defaults (current)
The preparer can set up default email settings for all future trips and may modify settings at the trip level

Mileage only claims (future)
One step process – no longer need to preapprove and then process

Email reminders to reconcile trips (future)
Email reminder option for traveler and preparer when the trip is 7 to 10 days past the reconciliation date
ENHANCEMENTS

Exceptions to Policy

The process for requesting approval of “Exception to Policy” has been simplified. The Department approver no longer needs to use the “Send for Review” to the Travel Team. This enhancement allows preparers to request approval of an exception to policy during the process of claiming expenses. The feature is found on the “Review and Submit” tab.
ENHANCEMENTS

Local hotels

• You may now book local hotels through Connexxus and they will be direct billed (same as with airfare).

• No need to request a prepayment check to be sent to the hotel

• No need to use a personal credit card to hold the room

• Negotiated rates
ENHANCEMENTS

Available Direct Bill Hotels:

1. Residence Inn San Diego La Jolla
2. Empress Hotel
3. Sheraton San Diego Mission Valley
4. Hilton La Jolla Torrey Pines
5. Hotel La Jolla
6. Sheraton La Jolla
7. San Diego Marriott La Jolla
8. Grande Colonial Hotel
9. Estancia La Jolla Hotel & Spa
Add Park N’ Fly to your itinerary

When booking online in Connexxus via Balboa Travel, you can now add Park N’ Fly to your reservation. Park N’ Fly offers UC San Diego employees parking at a discounted rate and waives the $3 service charge. Booking is easy, simply click the “Parking” link located on the Trip Overview page, select the desired parking option and pay using your Travel Card, or personal form of payment.
## KEEP CURRENT ON POLICY CHANGES

<table>
<thead>
<tr>
<th>Travel</th>
<th>Current Policy</th>
<th>Policy Effective 1/1/15</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenses</td>
<td>Expenses should be submitted within 21 days.</td>
<td>Expenses should be submitted within 21 days.</td>
</tr>
<tr>
<td></td>
<td>• If using a UC San Diego Travel Card, it is recommended that expense reimbursements be submitted within 10 days of the trip (or a prepayment to the Travel Card made prior to the trip end date) to ensure timely payment to US Bank.</td>
<td>• If using a UC San Diego Travel Card, it is recommended that expense reimbursements be submitted within 10 days of the trip (or a prepayment to the Travel Card made prior to the trip end date) to ensure timely payment to US Bank.</td>
</tr>
<tr>
<td></td>
<td>Final reporting of expenses must be submitted via MyTravel within 45 days of the trip’s completion.</td>
<td>Final reporting of expenses submitted via MyTravel after 45 days may be treated as taxable and reported on the employee’s W-2 or traveler’s 1099. (Travelers should consult with their tax professional as to whether the expense can be deducted on their individual tax return.)</td>
</tr>
</tbody>
</table>
Travel

Before You Travel
Booking Options
Expenses & Reimbursements
Meetings & Entertainment
Moves & Transfer
Training & Guidelines

Travel news
* Submit MyTravel and MyEvents claims by December 12 to have expenses included in the 2014 calendar year.
* The Travel and Entertainment Team is pleased to announce that it is offering classes via UC Learning! We look forward to seeing you.

Do you need to...
* Ask a question
* Apply for a Travel Card
* Preauthorize travel
* Book travel
* Claim travel expenses
* Claim meeting & entertaining expenses

Subscribe to travel news

Top 10
* Receipt requirements
* Mileage rates
* Calculating per diem
* Fly America Act
* Renting a car
* Meals for domestic travel
* About MyTravel
* Business travel insurance
* MyEvents: event examples
* About Connexxus