



UPDATES FROM TRAVEL & ENTERTAINMENT

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ANTICIPATED CHANGE TO TIMEFRAMES TO SUBMIT TRAVEL AND ENTERTAINMENT

	Current Policy	Proposed Policy
Travel	<p>Expenses should be submitted within 21 days.</p> <ul style="list-style-type: none"> 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. <p>Expenses submitted after six months should include an explanation as to why the event was not timely submitted.</p>	<p>Expenses should be submitted within 21 days.</p> <ul style="list-style-type: none"> 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. <p>Final reporting of expenses must be submitted via MyTravel within 45 days of the trip's completion. 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.)</p>



ANTICIPATED CHANGE TO TIMEFRAMES TO SUBMIT TRAVEL AND ENTERTAINMENT

	Current Policy	Proposed Policy
Meetings and Entertainment	<p>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.</p> <ul style="list-style-type: none">• If personal payment was used, it is recommended that expense reimbursements be submitted within 21 days to reduce any financial burden on the employee. <p>Expenses should be submitted within 60 days.</p> <p>Expenses submitted after 60 days but before six months should include an explanation as to why the event was not submitted within six months.</p>	<p>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.</p> <ul style="list-style-type: none">• If personal payment was used, it is recommended that expense reimbursements be submitted within 21 days to reduce any financial burden on the employee. <p>Final reporting of expenses must be submitted via MyEvents within 45 days of the event.</p> <p>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.)</p>



ANTICIPATED CHANGES TO STUDENT TRAVEL

	Scenario	Payment Type
1.	A student whose course or degree requires all students to travel as a condition of completing the course or degree.	Business expense
2.	A student whose course or degree does not require all students to travel as a condition of completing the course or degree.	Financial Aid
3.	A student attends a conference in support of academic endeavors.	Financial Aid
4.	A student presents at a conference specifically on behalf of the University.	Business expense
5.	A music student gives or conducts a performance specifically on behalf of the University.	Business expense
6.	A student attends a conference at the request of a faculty member or Principal Investigator (PI) for the purpose of bringing information back to the faculty member or PI. (Expectation is that all policy compliance travel expenses are reimbursed.)	Business expense
7.	A graduate student is working with a PI, whose research is similar. The student's dissertation research is research the PI's research group would otherwise perform, regardless of the student's academic interests. (Expectation is that funds are from the researcher.)	Business expense
8.	A student is traveling in connection with his/her role with a UC San Diego student organization, student government group, or interest group	Business expense
9.	A student is conducting research for his/her dissertation. The research is student led and is not intended to be used by a PI (or would otherwise be undertaken by a PI).	Financial Aid
10.	Student receives a department award to be used towards pursuing academic activities. (No change if the award is given to all students in a program or granted based upon an application/essay award process.)	Financial Aid
11.	Student receives a department award to offset expenses for meeting and interviewing with potential employers.	Gift
12.	A student obtains his or her own external funding (including external fellowships) to support his/her research, which funding is provided to the University to administer either under a PI or as the student being the PI.	Business expense

BUSINESS PURPOSES

- Attend a conference
 - Individual / Other
 - Why would a non-employee be attending this conference?
 - Individual / Employee
 - In support of position, to present a paper
- To meet with donors
 - To recognize for previous contributions?
 - To solicit new contributions?



BUSINESS PURPOSES

- Attend meeting
 - What meeting?
 - Topics discussed?
 - Includes mileages logs!
- Celebrating > Retirement & Years of Service
 - Include Employee's name and years of service with the business description
 - Question and answer will appear in MyEvent summary sheet for approvers to view




MYEVENTS ENHANCEMENTS

- Ability to add multiple attachments of the same type
 - Will no longer write over previous attachment
 - Travel dept will be able to attach documents after an event has been completed



MYTRAVEL ENHANCEMENTS

Preparer Home

 The travel team is currently processing claims that came into Travel's queue on September 11, 2014.



Travel preparer

Name WOHLRAB-HERBST, NANCY L

Email nwohrab@ucsd.edu

Available actions

- [Create a new trip](#)
- [Search for a trip, payment or traveler](#)
- [View completed trips](#)
- [Update or add a traveler account](#)
- [Update or add a vendor account](#)
- [View Travel Card Transactions](#)
- [Visit our Training Pages !\[\]\(0f48f43ebd21f231a458c96216dbf4d1_img.jpg\)](#)
- [Change email defaults](#)




MYTRAVEL ENHANCEMENTS

Email Defaults

Available actions

- [Return to travel home](#)

 Changes to email settings will be applied to all trips started after email settings have been modified.

Email to employee traveler after trip has been created and before it is preauthorized	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Email to department approver(s) requesting preauthorization of trip	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Email to preparer after trip has been preauthorized	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Email to employee traveler after trip has been preauthorized	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Email to department approver(s) requesting approval of prepayment	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Email to preparer after Travel Team approves prepayment	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Email to employee traveler to certify trip	<input checked="" type="radio"/> Yes	n/a
Email to preparer after trip has been reconciled and before the employee traveler has certified	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Email to preparer after trip has been certified by preparer or employee traveler	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Email to traveler after trip has been certified by preparer or employee traveler	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Email to department approver requesting approval of reconciled trip	<input checked="" type="radio"/> Yes	n/a
Email to department approver when reconciled trip status changes in MyApprovals	<input checked="" type="radio"/> Yes	n/a
Email to preparer after department approves reconciled trip	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Email to preparer when Travel Team approves reconciled trip	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Email to employee traveler when Travel Team approves reconciled trip	<input type="radio"/> Yes	<input checked="" type="radio"/> No

FY14 Processing Times for MyEvents

