

## Tracking the Status of Your Travel/Entertainment Reimbursements

*The online travel (TRV) and entertainment (ENT) reimbursement system includes a tracking feature – since CalNet Authentication is required for access, viewing TRV and ENT reports is restricted to the individual receiving the reimbursement and the Business Services team of report preparers. Scanning technology was implemented in Fall 2008; some of the reports in your list may not include images of your original report and attachments.*

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### Accessing the online tracking system via Blu

1. Log in from the UC Berkeley home page by clicking on the “Blu” link located to the right of the photo of the day.
2. Click on the FINANCE tab.
3. Click on “Entertainment Reimbursements” or “Travel Reimbursement.”
4. Select “Track Reports/View Reports.”
5. Enter the report ID number, if known, or simply enter your last name only and then click on the SEARCH button.
6. A list of your current and past reimbursement requests will appear.
7. Click on “Track” to view the processing status of that request.
8. Click on “View” to see a copy of the ENT or TRV report.
9. Click on the gray “View Image” button to see scanned versions of the original report, receipts and other attachments that were used to prepare the online report.
10. To move between travel and entertainment, click on “Reimburse Home” on the blue menu bar at the top of the page.

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### Accessing the online tracking system via Travel Services

1. Go to the Travel & Entertainment Services home page at <http://controller.berkeley.edu/travel/>
2. On the green sidebar, select “Online Reimbursement System (Login).”
3. Log in with your CalNet Authentication, as directed.
4. Select “Track Reports/View Reports” under either the travel (left) or entertainment (right) heading.
5. To move between travel and entertainment, click on “Reimburse Home” on the blue menu bar at the top of the page.
6. Enter the report ID number, if known, or simply enter your last name only and then click on the SEARCH button.
7. A list of your current and past reimbursement requests will appear.
8. Click on “Track” to view the processing status of that request.
9. Click on “View” to see a copy of the ENT or TRV report.
10. Click on the gray “View Image” button to see scanned versions of the original report, receipts and other attachments that were used to prepare the online report.

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### Tracking system information

**Date Report 1<sup>st</sup> Entered** – Business Services enters the original request into the online system as quickly as possible, typically within about one or two business days after receiving your paperwork.

**Date Sent to Reviewer** – As soon as the preparer has finished entering the appropriate information, the online report is available electronically to the person who will review it for accuracy and policy compliance (pre-audit assessment).

**Date Reviewer Approved** – Reports are typically reviewed the same day, or the next morning, after they were prepared.

**Date Paper Work In** – This is the date the documentation was scanned into the reimbursement system database.

**Date Travel Approved** – This date indicates that the auditor has completed a review of the submitted documentation and has found no errors or policy violations. From this point, the reimbursement is being actively prepared for payment via paper check or direct deposit.

**Date BFS Paid** – If you receive paper checks, this is the date your check was produced. Add about five more days for the check to reach you via US Mail. If you have established Electronic Funds Transfer (EFT) instructions with the Disbursements Office, your payment will be in your account within 24 to 48 hours.

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### Payments

The campus financial system **automatically consolidates all reimbursements** approved for you on any one day into one payment. If Business Services is aware of this, we will send you a message explaining what items are included.

If the amount of your **reimbursement is less** than the amount originally requested, Business Services will provide you with an explanation and, if appropriate, any options for appeal with the Travel Manager or the campus Controller’s Office.

If you currently receive paper checks and would like to **switch to electronic payments**, go to the Disbursements Office website for instructions: <http://controller.berkeley.edu/disbursements/>

If you already receive payments electronically, you only need to take action if you **change your bank account**. Go to the Blu portal on the UC Berkeley home page. Click on the PEOPLE tab. Select “Direct Deposit.”

Scanned images are available for current reports when the tracking page shows a date for “Date Paper Work In.” Reports were not scanned before Fall 2008, so older reports will not have images.

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