

University of California Travel Policy for Hosted Guests

Business Purpose of Your Trip

All travel supported by University of California, Berkeley funds is governed by UC *Business and Finance Bulletin G-28: Travel Regulations*.

What you need to do:

Invited guests should cite the title of their event as the business purpose.

Air Travel

Economy/coach airfare can be **billed directly to UC Berkeley**. Your host or mentor can request this authorization on the participant's behalf, if such an arrangement is desired. This authorization will allow a participant to work directly with BCD Travel to arrange an acceptable flight itinerary and the cost will be billed directly to the UC Berkeley campus.

Avoid purchasing discounted travel packages from other internet vendors unless you can confirm that every item in the package will be itemized separately (airfare, hotel daily room rate, number of nights, and tax/fees, for example).

Internet travel packages lacking adequate detail and economy seat upgrades cannot be reimbursed. IRS rulings on these issues prevent the University from making any exceptions, even for hosted guests who might have been unaware of these restrictions.

If your actual flight itinerary will include additional destinations for activities not related to one of the conferences listed above, you will need to provide information about a direct itinerary.

What you need to do:

If your flight was billed directly to UC Berkeley, you do not need to provide a copy of your flight itinerary - simply note this arrangement on your travel expense report.

If you paid for your airfare with personal funds, you'll need to **provide an invoice or itinerary** that includes these required elements: 1) name of vendor (person you paid), 2) amount paid, 3) transaction date (when you paid), 4) form of payment (cash, check, credit card), and 5) flight departures and destinations.

Higher levels of airline service will be reimbursed at the equivalent refundable economy fare.

Itineraries with multiple destinations - before your departure date, go online to any airline and print an unrestricted economy/coach itinerary for a round trip between your local airport and the destination airport. You will be reimbursed for the equivalent itinerary, or your actual itinerary if it cost less.

Ground Transportation

Park/Sleep/Fly packages offered by the traveler's local airport hotels **are not eligible for reimbursement** as a business-related expense.

What you need to do:

Ask the taxi or shuttle driver for a receipt. When no receipts are available, make a note of expenses, including any tips, as you incur them.

Automobile Travel

If you prefer driving your private automobile to your destination, instead of flying, reimbursement for expenses while in transit will be based on the equivalent refundable economy airfare plus your estimated transportation costs to and from the nearest airport.

What you need to do:

Print a page from the airline website showing an equivalent roundtrip coach airfare for your destination and provide the basis for your ground transportation costs with your trip receipts (optional).

When you drive your private automobile, you can be reimbursed for mileage at the current IRS rate of 58¢ per mile). You cannot be reimbursed for gasoline purchases or for any roadside assistance if you have car trouble during your trip. The IRS includes these costs in the standard mileage rate.

A mileage "receipt" is the page from any mapping program that shows the number of miles between your point of departure and your destination – double the mileage for a roundtrip.

You should **rent a compact or economy automobile**, unless you have justification and advance approval for renting a larger vehicle.

You can be **reimbursed for gasoline purchases**, but not mileage, when you drive a rental car.

Avoid express check-in. When you return your car, go inside to the counter and pay your bill. This will allow you to obtain the detailed receipt showing charges and payments you'll need for reimbursement *and* you'll ensure that the agency doesn't claim vehicle damage later. Make sure you always **get receipts for gasoline purchases**.

Lodging, Meals and Incidentals

"Lodging" includes a single-occupancy room rate, along with associated taxes and fees. Sharing your room with a non-business traveler, such as your spouse, does not impact your reimbursement when the single rate is the same as the double-occupancy rate.

When there is a difference in room rates and you have shared your room with a non-business traveler, ask the front desk at check-out to quote the single rate and associated taxes and fees. Make a note directly on your zero-balance receipt – the single rate will be your reimbursement.

If you need to cancel a hotel reservation, make sure to do this in advance to avoid a penalty and get a cancellation number.

Reimbursement for meals and incidentals is capped at \$62 per day. This is not a per diem – you will be reimbursed only for daily actual expenses, up to a maximum of \$62 for domestic trips lasting more than one and less than 29 days.

Domestic trips lasting longer than 29 days are eligible for a per diem. **Trips lasting less than 24 hours** are not eligible for meals and incidentals unless there is an overnight stay.

"Incidentals" are separate tips and gratuities paid to baggage handlers, porters, bellhops, maids, and such. Meal and taxi tips should be included in the reported costs of those services.

Miscellaneous expenses, such as internet fees to connect remotely with the campus, phone calls, and hotel business center charges can be reimbursed. Laundry expenses while traveling can be reimbursed if the trip exceeds six days at your destination.

What you need to do:

Avoid express check-out at hotels; always check out at the front desk in order to obtain the required **"zero balance" receipt** showing all of your charges and your payment. Express check-out statements are not accepted - you must have a statement that shows the amount and date of your actual payment to the hotel.

Personal services, such as mini-bar use, in-room movies and spa treatments, are not eligible for reimbursement. If these charges appear on your bill, deduct them from the total and make sure you clearly indicate that they are not to be reimbursed as business expenses.

Unless you have a compelling business reason for not having cancelled a hotel reservation in advance, you may find that the penalty fee is not eligible for reimbursement.

Always get a cash register or credit card receipt for your food purchases. If a receipt cannot be provided by the vendor, then make a note of your actual expense.

If you submit meal receipts that exceed the daily limit, the online travel reimbursement system will automatically cap your payment at the daily limit.

Overnight stays must be documented with a hotel bill.

Since there are no receipts associated with incidental expenses, make a note of your reasonable actual costs as you incur them.

Whenever possible, get a receipt for the miscellaneous expense and make a note of the business purpose on it. If these expenses are included on your hotel bill, make a note of the business purpose for each cost.