

FAQ's for Travelers and Travel Arrangers

For Berkeley Law faculty and event planners, this is a guide for trip planning and reporting assistance (inquiries@law.berkeley.edu). Berkeley Law clinics, centers, and departments have travel arrangers in each work group who can help travelers plan business-related trips. The campus **Travel Services** website offers information and helpful links for travelers: <https://travel.berkeley.edu/understand-policy/uc-policies>.

UC TRAVEL INSURANCE

Who is eligible for UC travel insurance coverage?

University employees traveling on official University business, and their traveling companions, are covered worldwide, 24 hours a day, for a wide variety of accidents and incidents.

Who are my "travel companions"?

Traveling companions are defined as a person or persons with whom the University employee has coordinated travel arrangements, and who intend to travel with the employee during the covered trip. Examples of traveling companions are a spouse or domestic partner, children, colleagues, friends and/or extended family. The University employee must list any travel companions when registering a trip for UC Travel Insurance coverage.

Does UC insurance also cover my personal trips booked via Connexus?

No - UC Trip insurance coverage is only available for travel on official University business. Campus Risk Services, however, offers travel insurance to employees and students for personal trips. Information about personal-trip insurance is available on the Campus Insurance Programs webpage at: <https://riskservices.berkeley.edu/insurance-programs/travel>.

What does this coverage cost?

This insurance is free to University employees and their companions while traveling on official University business, but the employee must register each trip in order to receive this coverage.

Where do I find a description of benefits?

A description of benefits is available on the campus Travel Services website – click on *Before the Trip* and select *Obtain Travel Insurance*.

How do I obtain this insurance?

If you use an agent with BCD/Balboa Travel to book your trip, you and your traveling companions will be automatically registered for UC travel insurance. If you book your own itinerary, you will need to follow the instructions on the campus Travel Services website to register yourself and your traveling companions for this coverage.

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How do I get an insurance card?

When you register your trip, you will receive an insurance card for you and any listed traveling companions. Always take the insurance card with you on your trip AND leave copies with your office or family.

If I book my own trip via Connexus, am I automatically covered?

No - you will need to register yourself and list any traveling companions by following the instructions on UCOP's website titled [UC Travel Insurance](#).

If I book my trip via an agent with BCD Travel, am I automatically covered?

Yes - the agent will automatically register you and any traveling companions for this coverage. Insurance cards will be sent to you and any travel companions.

Do I have to register each trip in order to be covered?

Yes - you must register each trip in order to be covered by UC travel insurance. Coverage requires the specific trip departure and return dates, destination, and the names of any traveling companions.

How do I file an insurance claim?

Information about insurance coverage and claim forms are available on the UCOP's website at <https://www.ucop.edu/risk-services-travel/personal.html>

BUSINESS PURPOSE OF YOUR TRIP

Can I add a personal leg to my business trip?

You may add a personal leg to any business trip **but**, in this situation, you should use personal funds for your booking. If you can demonstrate that the additional leg of your trip does not add any extra expense to the University, then you may use a DBID to confirm your booking. **Print a copy of the equivalent roundtrip coach/economy airfare for your travel dates and destination in advance** - you'll submit this information and an explanation of your itinerary when you submit business-related trip expenses for reimbursement.

I'd like to extend my business trip for a couple of days to visit family at the same destination – can I do this and still get reimbursed for all of my trip expenses?

You may add personal days to your business trip (with the approval of your supervisor, if required), but all of the expenses associated with these extra days must be paid with personal funds. This includes hotel lodging, meals and ground transportation.

May I use a DBID for a mixed business/personal trip?

No - you should use personal funds or a UC Travel Card and request reimbursement for the business-related expenses after the trip. UC policy prohibits the use of University funds for personal trip expenses, even if the traveler plans to reimburse the University for them later.

May I use a DBID to book my airline ticket if my host is going to pay for my travel expenses?

No - you should use personal funds or a UC Travel Card and request reimbursement directly from your host. UC policy prohibits the use of University funds to pay expenses that are not the liability of the University.

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May I request reimbursement for other trip expenses from the University if my host is going to provide reimbursement later?

No - you should use personal funds and request reimbursement directly from your host. UC policy prohibits the use of University funds to pay expenses that are not the liability of the University.

What types of documents can I use to describe the business purpose of my trip?

Keep it simple – if you have a copy of a program, agenda, invitation, or event announcement, just include this with your travel expense reimbursement request as explanation of the business purpose.

How much detail do I need to provide in my description of the business purpose of my trip?

You must provide sufficient detail to allow an auditor (campus, UCOP or IRS) to independently confirm that the trip activities actually took place at the destination stated, during the dates of your trip, and for the purpose described on your travel report. “Attend meeting” isn’t sufficient – “attend the 2012 annual meeting of the American Bar Association” is much better. Avoid mysterious acronyms – always spell out the words for a future auditor.

AIR TRAVEL

Can I use another travel website to book my airline itinerary or am I required to use only Connexus?

You may use any travel website to book your flight but, if you do, you’ll miss out on UC discounts and the direct-bill option for business-related travel available only via Connexus.

Can I purchase an internet vacation package if I find a lower rate I can afford?

Yes - but all charges must be itemized in sufficient detail or you may find that your package isn’t eligible for reimbursement by the University, per IRS guidelines. “Airfare and hotel = \$432.87” isn’t sufficient detail and your package cannot be reimbursed. Detailed flight itinerary + cost of airfare and related fees and nightly hotel room rate + number of nights” is sufficient for reimbursement.

Can I get reimbursed for my annual airline or airport club membership if I often use it to do business-related work while waiting for a flight?

No - the IRS has determined that this type of expense is always personal and is never eligible for reimbursement as a business-related expense.

Can I get reimbursed for a one-day airline or airport club membership?

Yes - if you can provide a reasonable business purpose for this miscellaneous trip expense.

Can I get reimbursed for an Economy Plus® or similar seat upgrade for my business trip?

It depends - if the upgrade to premium economy service was to accommodate a medical condition or other qualifying condition and is in lieu of first or business class, then you can be reimbursed for this expense. If, however, you purchased the seat upgrade for a non-qualifying condition, then this fee is not eligible for reimbursement as a business-related expense. Please see Airfare Guidelines in [Travel Policy in a Nutshell](#).

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If I use a DBID to book my business-related airfare, can I use my personal airline mileage reward points for a seat upgrade?

Yes - you may use your points to upgrade service from economy to business or first class if this action adds no extra cost to your economy airfare.

Can I use a DBID to book airfare for my travel companion and then reimburse the University after the trip?

No - under no circumstances may you use University funds to pay the travel expenses of a non-employee or an employee who will accompany you for personal, not business-related, reasons.

Can I use a DBID to book airfare for my spouse who will accompany me on a business trip?

No - under no circumstances can you use University funds to pay the travel expenses of a non-employee or an employee who will accompany you for personal, not business-related, reasons. If your spouse is also a University employee traveling to the same destination also for business-related reasons, then this individual should book their own airfare using a separate DBID issued in their name.

My spouse and I are both Berkeley Law faculty and we're both traveling on business together – how do we book our airfare and request reimbursement for our out-of-pocket trip expenses?

Each of you should book your trip as an individual employee and submit separate travel expense reimbursement requests after the trip. Obtain separate receipts for trip expenses wherever possible and ask the hotel to split your bill at check-out.

Can I use a DBID to book business class airfare for a hosted guest?

Yes - but only if you have obtained written approval to do so in advance from the Dean. Contact the [Business Services](#) for assistance in determining if your guest's situation may be eligible for air service at a higher level and for assistance preparing the request according to established protocol.

Can I book first/business class airfare via Connexus?

Yes - but only if you have obtained written approval to do so from the Dean before you book the flight. Contact Business Services if you need assistance in determining if your situation is eligible for air service at a this higher level and for assistance preparing the request according to established protocol. Note that the system will issue an automated alert to the department when first or business class airfare is purchased so the Dean's pre-approval can be independently verified.

What are the first/business class policy exceptions that can be approved by the Dean?

The Dean has been granted a delegation of authority to approve exceptional travel at first or business class service in advance of the trip for employees and hosted guests under these circumstances:

1. Business or first class is the only service offered between two points.
2. The use of coach class would be more expensive or time consuming – because of scheduling difficulties, traveling by air coach would require an unnecessary hotel expense, circuitous routing, or an unduly long layover when making connections.
3. An itinerary involves overnight travel without an opportunity for normal rest before the commencement of working hours.
4. Business or first class service is necessary to reasonably accommodate a disability or medical need of a traveler.

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What are the first/business class policy exceptions that can only be approved by the Chancellor?

In travel situations other than those described above, a written authorization to use business or first class service must be submitted through the Dean's Office to the Chancellor and approved in advance before you book the flight.

How do I request this exceptional approval?

In Berkeley Law, you may not contact the Chancellor's Office directly with your request for exceptional approval – all such requests must first be submitted to the Dean in the approved format for this type of request. Contact Business Services at inquiries@law.berkeley.edu.

Under what circumstances can I fly on a foreign airline?

Per the Fly America Act, all airline travel paid directly by, or reimbursed to the traveler from, federal funding must be booked using a U.S. carrier, unless certain exceptions apply. Exceptions include extended travel time by 24 hours or more on U.S. carriers, no direct or nonstop service available to your destination via U.S. carriers, travel costs will be reimbursed in full by a third party, or the United States and the foreign country to which you are traveling have established a bilateral or multilateral air transportation agreement.

If I cash in my airline mileage points to get a business class ticket, can I get reimbursed for the equivalent coach/economy fare for my itinerary?

No - you are not eligible for reimbursement for the simple reason that you did not incur an actual expense. Airline reward points do not have a cash value.

If my business trip only involved airfare paid with a DBID and no out-of-pocket expenses, do I still need to file a TRV report?

Yes - you will still need to submit a travel expense report to close the loop on your airfare purchase and to sign the Traveler's Certification statement as required by the IRS for any and all travel expenses paid with University funds.

GROUND TRANSPORTATION

If I buy a Park/Sleep/Fly package at the Hilton Hotel near Oakland International Airport, can I get reimbursed for this expense?

No - the IRS has determined that this type of expense is not eligible for reimbursement as a business-related expense. Since you haven't departed yet, this is considered local lodging with free parking, rather than free lodging with paid parking.

Do I have to use public transportation during my trip – do I have any other options?

No - you may use taxis and shuttles when using public transit is impractical, unavailable, or unsafe for the circumstances (i.e., late at night, unfamiliar environs).

I prefer to take a limousine to the airport – can I get reimbursed for this expense?

No - not unless you have a business reason for doing so or the fare is equivalent to taxi service for the same route.

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When do I need to keep receipts for my taxi or shuttle trips?

In Berkeley Law, receipts for all trip expenses are preferred. UC travel policy, however, only requires receipts for expenses of \$75 or more.

Can the University pay for my hosted guest's local ground transportation directly?

Yes - we have local taxi service on retainer to Berkeley Law. Send your request to inquiries@law.berkeley.edu to make a direct-billed reservation.

Can the University pay for my airport shuttle reservations up front?

No - we are unable to prepay your ground transportation via a bluCard or Event Planner credit card since travel-related expenses are restricted transactions for employees on both types of procurement cards. You should use personal funds or your University-issued US Bank travel credit card to prepay your shuttle service. An exception exists for employees who will play "an integral part" in a University-hosted event at a remote destination.

I prefer to drive to some destinations – can I get mileage reimbursement instead of airfare?

Yes - but your reimbursement will be limited to the equivalent round-trip, non-discounted economy or coach airfare to the airport nearest your trip destination. **Print a copy of the equivalent roundtrip coach/economy airfare for your travel dates and destination in advance** - you'll submit this information and an explanation of your itinerary when you submit business-related trip expenses for reimbursement.

I took my family with me to a Southern California conference and rented a car to transport everyone – can I get reimbursed for this expense?

In this situation, your reimbursement will be limited to the equivalent rate for a compact rental car for only those dates related to the business purpose of your trip.

My car had a flat tire while I was on a business trip – can I get reimbursed for the cost of the new tire?

No - per IRS guidelines, vehicle maintenance is included in the mileage reimbursement rate.

I borrowed my cousin's car for ground transportation while on a business trip – can I get reimbursed for the mileage?

No - you are not eligible for mileage reimbursement in this situation because you did not incur any expenses. Since you are not the owner of the car that was used during your trip, you did not incur maintenance or insurance expenses which are included in the mileage reimbursement rate. Gasoline purchases for a private vehicle are not eligible for reimbursement as a business expense because the cost of gasoline is included in the mileage reimbursement rate.

Can I get reimbursed for my gasoline purchases, instead of mileage, for use of my personal car on a business trip?

No - per IRS guidelines, your reimbursement is limited to only mileage at the established rate. There are no exceptions to this policy.

What can I use as my mileage "receipt" – am I required to provide one for reimbursement?

You are not required to provide a mileage receipt per UC travel policy, but it is a best practice to submit a page from any mapping program to confirm the number of miles between your point of departure and your trip destination. You can double this number for round trips.

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I really like SUV's – can I get reimbursed for renting one for my business trip?

It depends on the reason why you need to rent a vehicle larger than a compact – if you have a compelling business reason for this upgrade, you should obtain authorization in advance from the Dean for the added cost and then document the business purpose in your travel expense report.

I prefer motorcycles – can I get reimbursed if I rent one for my business trip?

No - per UC travel policy, rental of a motorcycle is not eligible as a business-related expense.

I have a really nice car and I only valet park – can I get reimbursed for valet parking on a business trip?

Per UC travel policy, valet parking charges in excess of normal parking charges are not eligible for reimbursement as a business-related expense unless it's the only parking available. Disbursements may require exceptional approval from the Dean depending on amount.

I'm a student – am I covered under the University's insurance when I rent a car from a contract agency?

No - only UC employees are eligible for liability and collision insurance coverage when using contract rental car agencies. Students traveling on University business should purchase the extra insurance coverage, unless this coverage is provided in their personal auto insurance policy.

LODGING, MEALS AND INCIDENTALS

Can I share my hotel room with a non-business travel companion?

Yes- but you can only be reimbursed for the single-occupancy rate if this is different. Most "single" room rates now accommodate two adults as the accepted standard for that rate.

Can I use express checkout?

No - always check out at the front desk and obtain a "zero balance" receipt showing both your itemized charges and your payment. This receipt is required for reimbursement.

I forgot to cancel my hotel reservation – can I get reimbursed for the cost of the penalty I was charged?

No - this expense is not eligible for reimbursement as a business-related expense unless there is a compelling business reason why you were unable to cancel your reservation in a timely manner.

Can I use the mini-bar and in-room entertainment on my business trip?

Yes - but these expenses are not eligible for reimbursement as business-related expenses, per IRS guidelines, and there are no exceptions. For this reason, you should not use the mini-bar to replace a business-related meal. Some hotels are now charging a "refrigerator" fee to guests, in addition to any charges incurred when you consume in-room snacks provided by the hotel. If a mandatory fee like this is assessed on all guests, regardless of actual use, and you have no option to decline the service, make a note of this in your travel expense report - mandatory hotel fees may be eligible for reimbursement.

The waiter dropped food on my only suit – can I get reimbursed for the cost to have it laundered during my trip?

Yes - while UC policy states that laundry service is only reimbursable for trips in excess of six days at your destination, you can be reimbursed for laundry expenses that are the result of an unexpected situation when

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you didn't bring sufficient clothing to replace a soiled outfit. Note the circumstances of this miscellaneous expense on the receipt.

I was at my destination for more than a week and I needed to do laundry – can I get reimbursed for this expense?

Yes - if you were at your destination for six days or longer, your laundry costs are eligible for reimbursement as a business-related expense.

I bought business-related books and items from exhibitors at a business conference – can I get reimbursed for the cost to ship everything back to the campus?

Yes - these shipping costs are eligible for reimbursement as a business-related expense.

Can I claim a per diem of \$62 per day for my meals and incidentals on a domestic business trip?

No - you are required to report actual expenses up to a maximum of \$62 per day. Per diems are limited to international trips, trips to Alaska or Hawaii, or domestic trips lasting longer than 29 days.

How do I report meal expenses when my non-business travel companion and I shared our meals?

You should note your meal expenses on each receipt and request reimbursement only for your portion.

Can I carry the unused portion of my meal allowance over to the next day?

No - the unused portion of your daily meal allowance cannot be carried over to future trip dates.

My trip was only 12 hours but it involved an overnight hotel stay – can I get reimbursed for my meal expenses?

Yes - but only if you include the required zero-balance hotel bill in your travel expense report.

My trip lasted only about six hours but I took colleagues out to lunch after our meeting so we could continue our business-related discussion – can I get reimbursed for the meal expense?

Yes - you can be reimbursed for 100% of the meal expense, but only if you note the names and affiliations of the other meal participants and provide a business purpose for the meal. This is considered "entertainment while on travel status."

I'm going to Chicago for research and my trip will last about six weeks – can I get a per diem or do I have to report meal expenses up to the max allowance for every day?

You may report a per diem in lieu of actual expenses since your trip exceeds 29 days.

Where can I find per diem rates for my international trip?

A link to the U.S. Department of State per diem rates for international locations is available on the web at: https://aoprals.state.gov/web920/per_diem.asp

I stayed with relatives during my business trip instead of getting a hotel – can I pay them an amount equivalent to what I would have paid for lodging?

No - the maximum amount you can spend for your entire trip is \$75, and only in the form of a non-cash gift, such as a hosted meal, flowers, or food items (candy, wine, fruit basket). A receipt is required for any host gift of \$25 or more.

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I left the hotel maid a tip every day – can I get reimbursed for this expense even though I don't have receipts?

Yes - tips are defined as “incidentals” and are included in the \$62/day maximum allowance for meals and incidentals. You should document these expenses as you incur them.

UC TRAVEL CARD AND CASH ADVANCES

Can I use my UC Travel Card for anything, anywhere?

No - the UC Travel Card is to be used only for eligible business-related expenses incurred while on travel status. It should not be used to purchase goods and services locally.

I don't have to worry about my UC Travel Card statement because the University pays this bill, right?

No - the UC Travel card is the personal financial responsibility of the cardholder. The UC Travel Card has a 60-day billing cycle – double that of most credit cards – to provide a reasonable amount of time in which to submit a travel expense reimbursement request and to receive payment which you will use to pay your credit card charges.

I am terminating my employment with the University – can I keep my UC Travel Card?

No - the UC Travel Card is for employees only; you must close your account and return or destroy your card upon the termination of your employment.

I'm traveling to Washington, DC – can I get a travel cash advance for this trip?

Yes – use your UC Travel Card at any ATM to withdraw cash for your trip. Keep a copy of the receipt that shows any bank fee charged for this withdrawal for reimbursement after your trip. If you do not have a UC Travel Card, then you must use personal funds and submit receipts for reimbursement when you return.

I'll be traveling to Uganda for several weeks for research – can I get a travel cash advance for this trip?

Yes - even if you don't have a UC Travel Card. In Berkeley Law, travel cash advances are available to travelers planning international trips and to students participating in advocacy competitions.

What do I have to do to get my advance?

Consult with your designated budget officer or with Business Services (inquiriesl@law.berkeley.edu) about your travel cash advance needs.

How do I report the use of my advance?

After your trip, complete a Travel Expense Form describing your trip costs and providing receipts, as explained on the form instructions and the Travel Policy in a Nutshell flyer, both available on the Controller's website: <https://travel.berkeley.edu/understand-policy/travel-policy-nutshell>. You may also visit our Business Services webpage for helpful tips regarding travel and reimbursement, <https://www.law.berkeley.edu/business-services/>

I had some of the cash advance left over after the trip – do I just get to keep this amount?

No - any unused portion of the travel cash advance must be returned to UC Berkeley. Attach a check payable to *UC Regents* in the amount of your unused cash advance to your Travel Expense Form.