

University of California, San Diego (UCSD)
Skaggs School of Pharmacy and Pharmaceutical Sciences (SSPPS)

Guidelines for Pre-Payment and Reimbursement of Travel Expenses

(ongoing updates as UCSD Travel policies change)

The SSPPS business administration works with faculty, staff and students to minimize out-of-pocket expenses for professional travel. We will assist you by pre-paying and/or reimbursing you for travel expenses in a timely manner. Please contact your supervisor for funding approval before making any travel commitments. The Admin will verify supervisory and funding approval, and process your travel expenses within 5 business days of receipt.

Travelers make their own reservations.

Travel Packages (Expedia.com or similar companies): The University will **not** provide travel reimbursement for any travel purchased via a travel package, such as Expedia.com or similar, even if they are less expensive. The reason is that itemized receipts are not available for these package deals.

Travel protection plan insurance fees are **not** paid nor reimbursed by UCSD.

For Visiting Scholars, follow policies at this link: <http://blink.ucsd.edu/travel/training-guidelines/visitors/scholars.html>

Travel Less than 24 Hours: The University will **not** reimburse for meals and incidentals for travel that is less than 24 hours.

Pre-Payment of Travel Expenses

Your Admin can pre-pay registration and hotel deposit if complete and proper documentation is provided at least 15 business days prior to the event (or the event deadlines, whichever comes first).

All pre-payments for any one trip must be requested at the same time.

- Information needed by the Admin to generate an **event number**:
 - Name of Traveler (first and last name)
 - Address of Traveler
 - Dates of Travel (departure and return dates)
 - Purpose of the Travel
 - Location of the Travel (city/state or city/country)
 - Estimated total cost of the trip
 - Index number of account funding this trip

Registration Fee (pre-paid)

- Complete the registration fee form. (Look for “early registration fee” price reductions and take advantage of them when possible.)
- Forward the completed original registration fee form to the Admin for processing and pre-payment. The original form will be mailed with the check to the professional meeting.
- Keep a copy of the completed registration form for your records.

- Check with the conference organization to confirm they received payment.

Hotel (pre-paid)

- Contact the hotel and make the hotel reservation in the traveler's name.
- You may need to use your credit card to hold the room. You can ask the hotel Not to charge the credit card, because UCSD will be sending a check.
- Ask the hotel to email or fax you a copy of the hotel bill, including your confirmation number.
- Forward the hotel bill to the Admin for pre-payment.
- Keep a copy of the hotel bill for your records.
- Check with the hotel to confirm they received payment.

Air Fare (pre-paid) (Two Options)

→ Pre-paid AirFare Option 1: Balboa Travel contact information.

Ask for UCSD-dedicated agents:

- Provide the Balboa Travel agent with the UCSD event number (described on page 1), your Department – School of Pharmacy and Pharmaceutical Sciences, and your mail code.
- Travel protection plan insurance fees are **not** paid by UCSD.
- UCSD does pay the fee for using Balboa Travel.

Phone: 858-678-3752 **Toll-free:** 888-617-5005

E-mail: ucsdtrvl@balboa.com

Balboa Travel Address:

5414 Oberlin Drive
San Diego, CA 92121

Balboa Travel Emergency: (800) 359-8773 (I.D. Code B7J0) This number is not a reservation or information line. Use for emergency travel situations only.

→ Pre-paid Airfare Option 2: Connexus, UC's Online Travel Program.

Detailed Guidance: <http://blink.ucsd.edu/travel/booking/connexus/>

- Connexus is a secure Web portal for booking UCSD business travel.
- Searches a comprehensive airfare inventory, including UC-negotiated prices
- Reduces out-of-pocket expenses. UCSD pre-pays airfare and the expense automatically displays in your MyTravel expense claim as a UCSD-paid item.
- Saves time as a single source for air, car, and hotel reservations
- Provides automatic Business Travel Accident Insurance coverage
- Can store your UCSD Travel Card for hotel and rental car expenses
- Has built-in guidance for compliance with UC travel policy
- Provides quick access to contacts in case of emergency.

Reimbursement of Travel Expenses

UCSD has strict time constraints on processing travel expenses, and the timing begins the day after your travel ends. To avoid travel expenses being reported as **your taxable income**, give the Admin your completed request form and all original receipts within 5 days of the travel end date.

SSPPS Travel Reimbursement Request form:

http://pharmacy.ucsd.edu/administration/docs/Travel_Expense_Form.pdf

All receipts must be submitted together at the same time, small ones taped in chronological order to an 8-1/2" x 11" paper, in categories of "ground transportation," "meals," "other." Original receipts are required for all reimbursements, whether the travel was pre-paid or not.

Any expenses incurred prior to the trip cannot be reimbursed until after the trip.

UCSD employees are reimbursed by direct deposit to their bank account. This should be the same as direct deposit payroll. If you have not set up either process, please use this form:

http://www-bfs.ucsd.edu/dis/pdf/Disb_Dir_Dep.pdf

San Diego Meetings (limited reimbursement)

UCSD reimburses (or pre-pays – see pre-payment info on page 1): registration fee and applicable parking fees. UCSD does not reimburse for lodging, meals, nor incidentals when meetings are in San Diego because the traveler is not on "travel status."

Registration Fee (reimbursement)

- Forward a completed copy of the registration fee form to the Admin. It needs to show the name & dates of the conference, and proof of payment with zero balance.
- Keep a copy of the completed registration fee form for your records.

Hotel (reimbursement)

- Forward the original hotel bill to the Admin. The bill was provided to you when you checked out of the hotel. We need the hotel statement even if the bill was pre-paid.
- Keep a copy of the hotel bill for your records.

Air Fare (reimbursement)

- Forward the original airfare receipt to the Admin. If airfare was purchased online, a copy of the internet receipt is acceptable as long as it proves that you paid, and there is a zero balance due. UCSD pre-paid air fare also requires documentation upon return from the trip. This might be an email from Balboa Travel.

Travel protection plan insurance fees are **not** reimbursed by UCSD.
Reasonable extra baggage fees **are** reimbursed.

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Ground Transportation (reimbursement)

UC Travel Policy states that, when surface transportation is used in lieu of air travel, the traveler can only claim the cost of regular coach/economy airfare for the location of travel, plus transportation costs to and from the airport.

Please provide supporting documentation of airfare for comparison.

Rental car fees plus extra gas when returning the car can be reimbursed.
UCSD does **not** reimburse insurance costs.

Taxi to/from the airport OR Parking near the airport are reimbursable, as well as other necessary ground transportation while on University travel status.

Please provide receipts showing proof of payment to your Admin.

Personal Car Mileage (reimbursement)

An employee's personal car mileage may be reimbursed by the Admin by completing this form:
http://pharmacy.ucsd.edu/administration/docs/Mileage_Reimbursement_Form.pdf

- Provide the Admin with the round-trip mileage from home or from UCSD to the professional meeting. (Online maps/directions can be helpful in providing mileage.)
- Reimbursement will be provided based on the current UCSD mileage rate.

Driving vs. Flying: The University will reimburse for mileage up to the cost of round-trip coach air fare only. If flying round-trip is more economical than driving then we recommend you fly to the meeting.

Meals (reimbursement)

UCSD requires original itemized receipts for all meals. Alcohol beverages are **not** reimbursed while on travel status.

If there was a group meal for official University business, the first choice is to request a separate receipt for each traveler. If the restaurant is unable to provide separate receipts, then one person should keep the original itemized receipt. A group receipt can be reimbursed by using this form. It requires a detailed explanation of the business purpose, plus a list of attendees, their titles & professional affiliations. http://pharmacy.ucsd.edu/administration/docs/Meetings_Events_Form.pdf