

RECEIPT REQUIREMENTS

Best practice: Keep a log of your daily meal and incidental expenses

- Make sure your airfare claim/ itinerary for reimbursement shows itinerary and that it has been paid.*
- Receipts are required for all domestic lodging and rental car expenses regardless of the cost.*
- Receipts are required for individual expense of \$75.00 or more*
- Definition of receipt(s): receipts must show ownership of payment and demonstration of cost.*
- If meal receipts are not available, traveler should submit a log of the meal expenses by meal type to the ERSO Reimbursement Services unit as the back-up for the reimbursement request. Please note that the meal and incidental expenses (M&IE) daily limit for domestic travel is currently set at \$74.00 and that this limit is not to be treated as per diem*
- If federal or state funds were charged for the travel expense, the traveler should certify that no alcohol is claimed as part of the meal cost.*

AFTER YOUR TRIP

Complete the Travel Reimbursement Form, scan your receipts and submit your travel expense form along with your support documentation through the **Intranet**. Step-by-step instructions will lead you through the submission process. Reimbursement Services staff are committed to getting you reimbursed in a timely manner.

Traveler must certify expenses on the Travel Expense form via signature or electronic certification.

Helpful tips to speed reimbursement

- Follow the guidelines in this document
- Provide itemized receipts when necessary and required
- Redact your private information on all support documentation
- Complete the Travel Expense form
- Traveler must certify travel expenses by signature or electronic certification of expenses claimed via the Intranet
- Submit your reimbursement request through the Intranet

Resources – If you have questions or need assistance regarding your UC business travel, please contact **ERSO travel help** at ersotravelhelp@erso.berkeley.edu

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ERSO

QUICK GUIDE TO TRAVELING ON UC FUNDS

ERSO Reimbursement Services
ersotravelhelp@erso.berkeley.edu

BEFORE YOUR TRIP

Sign up for University Travel Insurance prior to departing on University business at <http://riskservices.berkeley.edu/insurance-programs/travel>. For detailed information on travel insurance, please refer to <http://riskservices.berkeley.edu/insurance-programs/travel>

Do not book Travel or Vacation

“Packages” (i.e., airfare, lodging and car rental etc.) unless they are separately priced. Itemized expenses and supporting documentation are required when requesting reimbursement for University business travel expenses. Travel or vacation “packages” purchased from internet vendors generally do not include detailed itemized expenses. Under policy non-itemized travel/vacation package cannot be reimbursed.

Air Travel – Air travel shall be economy or coach. Exceptional circumstance justification must be provided at the time traveler requests reimbursements. For detailed information, please refer to section VII of the UC Travel Policy at <http://policy.ucop.edu/doc/3420365/BFB-G-28>. Documentation of airfare expense should show the trip itinerary and that the transaction has been paid.

Foreign Air Travel – When traveling on federal funding, there may be restrictions on using foreign air carriers (check with your RSO for details).

Use Connexus – UC’s Travel Booking Program provides online and full agent assistance to UC business travelers for online travel booking options. Connexus offers favorable negotiated rates for hotel accommodations and car to save out-of-pocket expenses. Traveler should receive a confirmed air itinerary and receipt at the time of the e-ticket issuance. See the Connexus site for booking:

<http://controller.berkeley.edu/travel/index.htm>

Conference Registration – Submit a request through the Intranet with registration information and conference location and duration. CSS Team 2 Reimbursement staff will process your request once approved by your faculty/ delegate. For reimbursement, submit registration form and confirmation of payment under supply queue.

DURING YOUR TRIP

Meals & Incidental Expenses – Meals and incidental expenses (M&IE) are not allowed on travel of less than 24 hours.

Travel by Car

Rental car – If a University-contracted rental agency (Hertz, National and Enterprise) is used **you need not** purchase additional insurance coverage. **Give the vendor the UCB Identification number** at the point of vehicle reservation or pick-up and insurance will be included in the price. UC Berkeley identification numbers and other important information on car rental are available at <http://riskservices.berkeley.edu/insurance-programs/auto/rented-vehicles>

If you rent in AK, HI or US Territories, or if a UC contracted car rental agency is not available in the pick-up location, you must purchase liability insurance. The cost is reimbursable.

Personal vehicle – If you use your personal vehicle for university business you are eligible for mileage reimbursement. Use the Travel Reimbursement form(s) located here:

http://www.erso.berkeley.edu/tools/tools_005a.shtml#

Insurance coverage when using a private vehicle for UC Berkeley travel

Travelers are responsible for accidental damage when using personal vehicles for University business. Your personal insurance is the primary coverage. Up to \$500 out-of-pocket expense or the amount of the deductible (co-insurance), whichever is less, may be reimbursable pending upon departmental approval and fund restriction. Detailed information is available at <http://riskservices.berkeley.edu/insurance-programs/auto>