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**Topic**
Financial Administration [1]

**Policy Number**
300-43

**Reviewed Date**
November 22, 2017

**Responsible Office**
- Office of the Senior Vice Chancellor, Finance and Administration [2]

**Purpose**
This policy outlines campus specific policies relating to UCSF in the areas of travel, meeting, and entertainment that are not covered by UCOP policies.

**Definitions**

**Connexxus**
Recommended UC travel portal for booking air, car, and hotel.

**Corporate Travel Card**
A credit card issued by UCSF which is used for business travel related expenses.

**MyExpense**
Employee travel and non-travel reimbursement, and non-employee reimbursement system for business travel-related expenses.

**Signature Card**
The U242 Signature Authorization Card, granting signature authorization to specific individuals for certain departments and University expenditures.

**Policy**

A. Travel
Use of MyExpense for Travel reimbursement is required.
Use of Connexxus for business travel purchases is recommended.
Ancillary Charges ? Department designated travel approver may approve travel-related ancillary charges such as early check-in or priority boarding, checked or carry-on baggage fees, seat selection, higher cost economy airfare ? Economy Plus, Extra Comfort, or other necessary air expenses to accomplish the business purpose of the trip. Exceptional approval does not need to be obtained for these types of travel expenses.
Monthly recurring expenses totaling $500 or less per quarter (examples include small dollar recurring costs to say business visits to a local offsite location for parking fees, tolls, transit fees, etc.) ? Expense reports must be submitted within 45 days after the last day of the quarter.
Corporate Travel Card ? there is a six month employment requirement for new employees seeking a travel card. Exceptions to this requirement will need the approval of the Controller?s Office.
Cash advances for non-employees must be approved by the Controller?s Office AP Director or delegate.
Generally suppliers should follow UC G-28 Travel Regulations. Under special circumstances a supplier?s organizational travel policy may be followed if there is a signed supplier contractual agreement between the supplier and UCSF and as long as no fund restrictions apply.

B. Meeting/Entertainment

- Use of the BearBuy Meeting and Entertainment Form and MyExpense for Meeting and Entertainment reimbursement is required.
- The host name is required on the Meeting and Entertainment form but the host signature is not required.

C. Approval Authority

Approval for reimbursement of travel and meeting and entertainment is based on signature card delegation. Certain travel, meeting and entertainment, tuition, honorarium, and relocation reimbursements require exceptional or special approval and must be approved in accordance with the Travel & Entertainment Expense Approval Matrix [3] posted on the Controller?s Office website. Exceptional approval is delegated by the Chancellor and is generally limited to a small number of individuals within each Control Point.

Responsibilities

- Department approver?s responsibility is to ensure that the travel and meeting/entertainment expense reimbursement is in compliance with UC policies.
- Campus Controller?s Office, Accounts Payable Unit has the responsibility to maintain and update this Campus Administrative Policy and the related travel and entertainment reimbursement procedures.

Procedures

- Travel & Entertainment Reimbursement [4]
- Travel & Entertainment Expense Approval Matrix [3]
References

- University of California G-28 Travel Regulations [5]
- University of California Policy BFB-BUS-79 Expenditures for Business Meetings, Entertainment, and Other Occasions [6]
- UCSF Controller's Office Website [7]

Links:
[1] https://policies.ucsf.edu/policy/300
[2] mailto:SVCPOLICIES@ucsf.edu