



UCLA Policy Requirements for PAB Travel Reimbursements (TRs)

Note: The policy requirements referenced are provided from UC Travel Regulations and UC Expenditures for Business Meetings, Entertainment, and Other Meetings. This document is an adaptation of the rules and requirements for the needs of the department.

TR Timeframe and Submission Deadline

Timeframe	Action
Before Trip	<p>Traveler requests any eligible prepaid expenses (airfare and conference fees) and reviews reimbursable expenses</p> <p><u>Travel Insurance</u> PLEASE REGISTER YOURSELF FOR OUT-OF-STATE AND OUT-OF-COUNTRY TRAVEL INSURANCE! Travel booked through UC Travel is automatically insured, but many times we book travel through the Internet or directly with the Airline. It is at these times when you must remember to register your travel for insurance coverage. Please see the following links for more information: https://www.irm.ucla.edu/travel-insurance/travel-insurance-benefits https://ucla.app.box.com/v/irm-travel-registration</p>
During/End of Trip	Traveler makes allowable expenses and saves all itemized receipts
By 30 calendar days post-trip	Traveler submits reimbursement request to their admin (signed PAB reimbursement form, original itemized receipts, and justifications)
Within 3 days of receiving request from traveler	ASG Admin creates/submits TR for the traveler in Express
By 35 calendar days post-trip	Once TR is submitted, Traveler is notified via email to review and approve TR



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Following your trip or event, you **must fill out a PAB reimbursement form** and provide all documentation, original itemized receipts and justifications to their admin, within 30 days post-travel.

The processor will proxy as the traveler and submit a travel reimbursement through UCLA Express (www.express.travel.ucla.edu).

TRs must be submitted to their admin by 30 days after the end of the trip or event. TRs submitted after 45 days may be imputed as income on the employee's W-2 unless a reasonable justification for the late submission is provided. In all cases, if the submission is made more than 6 months after the end of the trip or event, income will be imputed on the employee's W-2.

Expense	Allowable	Unallowable
<p>Transportation and Lodging – based on the most economical mode of transportation/lodging. Should not exceed per diem rates based on http://www.defensetravel.dod.mil/site/perdiemCalc.cfm</p>		
Airfare	<ul style="list-style-type: none"> • Coach/economy class fares • Baggage fees (if not included in airfare; maximum of one bag each way) 	<ul style="list-style-type: none"> • Class fares higher than coach or economy • Upgrades (early check-in, extra leg room, etc.)
Car Services	<ul style="list-style-type: none"> • Only upon prior approval/authorization 	<ul style="list-style-type: none"> • Limousine
Car Rental	<ul style="list-style-type: none"> • Only when it is more advantageous than other means of commercial transportation • Refueling charges – when purchase through UCLA's rental contracts • Hand-held or uninstalled GPS devices should not be rented unless the traveler is unfamiliar with the location of travel 	<ul style="list-style-type: none"> • Any upgrades not using UCLA's contract rates <ul style="list-style-type: none"> ○ Refueling charges ○ Insurance ○ Etc.

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Lodging	<ul style="list-style-type: none"> • Room rate and taxes can be pre-paid and charged directly to the university (typically for individuals visiting UCLA, not for UCLA employees) • Internet charges • *NEW* Nightly rate exceeds \$275 only IF conference venue is located at the hotel 	<ul style="list-style-type: none"> • Lodging site is within a 40 mile radius of the Traveler's residence or institution, whichever is closer • *NEW* Nightly rate exceeds \$275 – will require exceptional approval
Parking	<ul style="list-style-type: none"> • Short-term parking such as day/overnight parking at the airport 	<ul style="list-style-type: none"> • Valet parking
Taxis and Local Transportation	<ul style="list-style-type: none"> • To and from airport • Taxis, bus, rail, shuttle, Uber, Lyft, etc. 	

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<p>Mileage – computed between the traveler's institution and destination (can be computed between traveler's home and institution only if travel originates or terminates on a regularly scheduled day off). Mileage is only claimed when using a private vehicle. Toll fees can also be reimbursed.</p>		
Lieu of Air	<ul style="list-style-type: none"> • Use of surface transportation even though air travel is the appropriate mode or transportation, with prior approval • Cost of meals and lodging, parking, mileage, tolls, taxis, and ferries incurred while in transit by surface transportation may be reimbursed 	<ul style="list-style-type: none"> • Total costs should not exceed the costs of airfare plus transportation costs to and from the terminals

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PHYSICS & ASTRONOMY

Off-site meetings	<ul style="list-style-type: none"> • Temporary assignment; not on travel status • Between off-site business meeting and institution/home (whichever is less) 	
Travel	<ul style="list-style-type: none"> • Over 24 hours • One round trip (including parking) OR two round trips (with short-term parking) when traveler is driven to location 	
<p>Meals and Entertainment – <i>maximums listed include meal cost, taxes and gratuity. *The maximums listed are subject to change every calendar year; new rates will be provided in January</i></p>		
Meals – Travel (over 24 Hours)	<ul style="list-style-type: none"> • *NEW* \$79/Day • When traveling with fellow UCLA employees, separate receipts are required for each person’s meal (each person must pay for their own meals) 	<ul style="list-style-type: none"> • Meal costs/tax/gratuity exceeding per day rate • Meals for travel less than 24 hours that do not include a lodging expense • Alcohol • Paying for other individuals’ meals if it is not considered entertainment



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Gratuity	<ul style="list-style-type: none"> • Should not exceed 20% of the meal or transportation costs. Gratuity is already factored into the meal and entertainment maximums listed above 	<ul style="list-style-type: none"> • Gratuity over 20%
<p>Entertainment – expenditures for meals and related services incurred in connection with meetings of UCLA employees to conduct official University business and for social or recreational activities in support of the University’s mission. At least one UCLA employee must be present at any business meeting that includes non-University persons.</p>		
Alcohol	<ul style="list-style-type: none"> • May be allowed depending on the funding source (check with ASG before) 	<ul style="list-style-type: none"> • May not be allowed depending on the funding source (check with ASG before)
Breakfast	<ul style="list-style-type: none"> • \$31/person 	<ul style="list-style-type: none"> • Meal costs/tax/gratuity exceeding per person rate
Lunch	<ul style="list-style-type: none"> • \$54/person 	<ul style="list-style-type: none"> • Meal costs/tax/gratuity exceeding per person rate
Dinner	<ul style="list-style-type: none"> • \$94/person 	<ul style="list-style-type: none"> • Meal costs/tax/gratuity exceeding per person rate
Refreshments	<ul style="list-style-type: none"> • \$22/person 	<ul style="list-style-type: none"> • Meal costs/tax/gratuity exceeding per person rate
Other		
Registration/ Conference Fees	<ul style="list-style-type: none"> • May be prepaid by the university if the organization allows check payments 	<ul style="list-style-type: none"> • Any meals and miscellaneous expenses associated with the conference cannot be prepaid and must be submitted for reimbursement