



UNIVERSITY OF CALIFORNIA, SANTA BARBARA
SOLID STATE LIGHTING AND ENERGY CENTER

TRAVEL APPROVAL FORM

FUND:

GENERAL INFO

Traveler:		
Destination(s):		
Lodging/Meals Per Diem:	/	
Purpose of Trip:		
Dates of Trip:	Expected Begin Date:	Expected Return Date:
Personal Time:	From:	To:

Check Here to Confirm Flight Comparison if you'll have Personal Time

ESTIMATE ADVANCE

Transportation: (Car mileage, airfare, etc.)		
Lodging:		
Meals:		X
Other: (Reg. fee, etc.)		
Total Estimated Cost:		

Travel Advance:	
Date Needed by:	
Total Advance Amount:	

SIGNATURES

DATE

Traveler:		
PI Approval:		
Funding Approval: Financial Manager		
Department Approval: Chair		
College of Engineering Approval:	Not required	

Per Diem and Currency information:

1. Per diem rates:

- **Domestic:**

<http://www.gsa.gov/portal/category/104711>

- **International:**

<http://www.defensetravel.dod.mil/site/perdiemCalc.cfm>

2. Currency Conversion:

<http://www.oanda.com/currency/converter/>

Lodging Taxes (Defense Travel Management Office):

Frequently Asked Questions

1. Is lodging (room) tax included in the lodging ceiling in the Gov't locality per diem rate?

Yes, in foreign countries; and no, in the U.S. and its territories and possessions.

2. If lodging tax is excluded from the U.S. and U.S. territory and possessions per diem rate lodging allowances, will I be reimbursed for the room tax I paid? How?

Yes, you'll be reimbursed. To be reimbursed for the room tax for U.S. and U.S. territory and possessions TDY and (when lodgings plus per diem is involved) U.S. and U.S. territory and possessions PCS travel you must include the total tax amount paid (as indicated on your lodging statement) as a "Reimbursable Expense" item when you submit your travel voucher for payment. This pertains to lodging (room) tax only. Also note that, if you stay in U.S. lodgings that have a higher cost than the locality per diem lodging ceiling, you'll be responsible for the excess lodging cost AND the tax on that excess cost.

3. Does this mean there will be different reimbursable travel expenses for travel in the U.S. and U.S. territories and possessions, and travel in foreign countries?

Yes. The room tax is separated from the room rates for the per diem rates for the U.S. and U.S. territories and possessions only; not so for foreign countries. The traveler must be aware of this change to submit a correct travel voucher. TDY vouchers must list the room tax separately as a reimbursable expense for U.S. and U.S. territory and possessions TDY sites but include the tax as part of the room cost for foreign locations.

<http://www.defensetravel.dod.mil/site/faqlodging.cfm>

**DOMESTIC TRAVEL
REIMBURSEMENT WORKSHEET**

Submit completed form along with all original receipts to your travel processor

Name: _____ Date: _____
SS#/Employee ID#: _____ UC Employee: Yes No
Address: _____ U.S. Citizen: Yes No

City of Residence: _____
Phone: _____ Vendor ID (if known): _____
E-mail Address: _____ Home Campus: _____

Account to be charged: _____

Purpose of Travel: _____

Destination: _____

Initial Departure Date: _____ Return Date: _____

Initial Departure Time: _____ Return Time: _____

Did you obtain a Travel Advance for this trip? No _____ Yes _____ Amount: \$ _____

Was there any personal time during this trip? No Yes From: _____ To: _____

MEALS AND INCIDENTAL EXPENSES (LIST ACTUAL EXPENSES ON PAGE 2)

Actual amount spent on meals listed on daily log. You may claim up to \$71 per day.

There is no per diem for Domestic (See page 2 for daily log.)

LODGING

Did you share a room? Yes _____ No _____ If so, with whom? _____

Number of nights: _____ Rate: \$ _____ Tax: \$ _____ Other: \$ _____

Number of nights: _____ Rate: \$ _____ Tax: \$ _____ Other: \$ _____

Number of nights: _____ Rate: \$ _____ Tax: \$ _____ Other: \$ _____

TRANSPORTATION

Airfare: \$ _____ RT Paid for by: Credit Card _____ Charged to Department _____

Private Car Mileage: _____ License Plate #: _____ Check here to confirm your liability insurance

Rental Vehicle: \$ _____ Rental Vehicle Gasoline: \$ _____ UC Vehicle: Yes No

Taxi/Bus: \$ _____ Train: \$ _____ Other: \$ _____

MISCELLANEOUS

Registration: \$ _____ Tele/Fax/Internet: \$ _____ Parking: \$ _____ Other (explain):

\$ _____

Comments: _____

SIGNATURES

<p>I certify that the above is a true statement, that the expenses claimed were incurred by me on official University business on the dates shown, and that I have attached original receipts for each expense of \$75 or more, as required by University policy.</p> <p>_____</p> <p>AUTHORIZING SIGNATURE DATE</p>	<p>AUTHORIZING SIGNATURE DATE_</p> <p>_____</p> <p>Print name and title</p>
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FOREIGN TRAVEL REIMBURSEMENT WORKSHEET

Submit completed form along with all original receipts to your travel processor.

Name: _____ Date: _____

SS#/Employee ID#: _____ UC Employee: Yes No

Extension: _____ U.S. Citizen: Yes No

E-mail Address: _____ City of Residence: _____

Home Campus: _____ Vendor I.D. # (if known): _____

Account to be charged: _____

Purpose of Travel: _____

Destination: _____

Did you obtain a Travel Advance for this trip? No Yes \$ _____

Was there any personal time during this trip? No Yes From: _____ To: _____

Initial Departure Location: _____ Initial Departure Date: _____ Initial Departure Time: _____

	Arrival Date	Arrival Time	Departure Date	Departure Time
Location 1:				
Location 2:				
Location 3:				
Location 4:				

Final Arrival Location: _____ Final Arrival Date: _____ Final Arrival Time: _____

TRANSPORTATION

Airfare: \$ _____ RT Paid for by: Credit Card Charged to Department

Private Car Mileage: _____ License Plate #: _____ Check here to confirm your liability insurance.

Rental Vehicle: \$ _____ Rental Vehicle Gasoline: \$ _____ UC Vehicle: Yes No

Taxi/Bus: \$ _____ / _____ Train \$ _____ Other: \$ _____ Parking: \$ _____

PER DIEM (MEALS AND LODGING)

Are you claiming per diem meals? Yes No or Actual Amount \$ _____

Are you claiming per diem lodging? Yes No or Actual Amount \$ _____

(You must provide receipts for lodging if you are claiming "actual" rather than per diem.)

MISCELLANEOUS Non-UC Funding: _____

Registration: \$ _____ Telephone/Fax: \$ _____ Other (explain): \$ _____

Foreign Exchange Fees: \$ _____ Exchange Rate Used: \$ 1.00 U.S. = _____

Comments: _____

SIGNATURES

I certify that the above is a true statement, that the expenses claimed were incurred by me on official University business on the dates shown, and that I have attached original receipts for each expense of \$75 or more, as required by University policy.

Traveler's Signature

Date

AUTHORIZING SIGNATURE

DATE

Print name and title:



DECLARATION OF MISSING EVIDENCE THAT A PAYMENT WAS MADE ON BEHALF OF THE REGENTS OF THE UNIVERSITY OF CALIFORNIA

Submit this form, completed by the traveler along with the Travel Expense Vouchers form, when original required receipt(s) have been lost or misplaced by the traveler. Fax copies or photocopies of lost or unavailable receipts must accompany this form. This form is in no way intended as a replacement for no receipt documentation or to serve as evidence of incurred expenses.

Please have traveler complete one form per receipt. Attach form(s) to Travel Expense Voucher. Copy this form as needed.

_____ declare that:
(Traveler's Name - Please Print)

1. Circle applicable option:

- a. I disbursed personal monies on behalf of the Regents of the University of California as needed:
b. University funds were disbursed on my behalf by the Regents of the University of California as follows:

Date: _____ Amount: _____

Description: _____

2. The original receipt is not available to submit with the Travel Expense Voucher claim. The reason is as follows:

3. Circle applicable option:

- a. I request I be reimbursed for this disbursement of my personal funds.
b. I request my Travel Expense Voucher be processed for those expenses paid directly by the University and for which I am unable to produce the necessary documentation to support such expenditures.

Signature: _____ Date: _____



OFFICE OF THE DEAN
COLLEGE OF ENGINEERING

SANTA BARBARA, CALIFORNIA 93106
Telephone: 805-893-3141

EXCEPTION FOR LODGING OVER FEDERAL PER DIEM RATE:

Submit this form, completed by the traveler & Dept. Chair along with the Travel Expense Voucher form, when lodging is 1-199% over the destination city's federal per diem rate. If rate exceeds 200%, the Dean will need to approve in addition to the Dept. Chair

Traveler's Name: _____ Dates of Trip: _____
Destination: _____ Lodging Per Diem Rate: _____
Actual Room Rate (room rate only) _____ % Over Federal Per Diem: _____

Reason for Exception: Circle the applicable option:

1. Lodging's proximity to meeting place and public transportation -- *Lodging closest to meetings/conferences can be more expensive than hotels further away. Benefits are travelers eliminate or minimize additional transportation cost. After evening activities won't require travelers to use public transportation at night in potentially undesirable locations. Time spent navigating/traveling in unfamiliar locations can be prohibitive and stressful.*
2. Quoted rates at all hotels within the area are higher than the per diem rates listed for the destination – *provide 2 or more price listings from comparable nearby hotels*
3. Lodging provided internet at a reasonable cost or for free -- *Many faculty have computers without ethernet ports so wireless connections are needed*
4. Limited lodging availability due to large event(s) at destination --*If several large events/meetings coincide with traveler's lodging needs, it may cause rates to rise or sell out due to increased demand*
5. Lodging rate is negotiated rate for the meeting/conference that is being attended. -- *Staying at the hotel where the meeting is held is beneficial for transportation considerations, parking, networking opportunities before and after meetings, etc.*
6. Other – *Please explain in detail*

Traveler Date

Dept. Chair/Director Date

Dean Date
Dean's signature required on lodging 200% or more over the federal per diem rate

Non-US Citizens:

1. Picture page of your passport copy
2. Visa page inside of your passport copy
3. I-94/arrival and department record copy (if available)
4. Immigration documentation (Immigration status) copy
5. Completed UCSB Declaration of Immigration Status by Non-U.S. Citizens.

Declaration of Immigration Status by Non-U.S. Citizens

Submit with Travel Voucher Documentation

Traveler Instructions

To comply with the U.S. immigration laws, UCSB requires the following Traveler information (i.e., Items A-E below) to be provided by all Non-U.S. Citizen Travelers (Travelers) prior to receiving travel reimbursements or benefits (e.g., when UCSB directly pays travel related hotel or airline expenses on your behalf) from UCSB. Please complete the below information and return to the UCSB representative who requested this information.

A. Indicate your current U.S. Immigration Status (or your expected U.S. Immigration Status if you haven't yet entered the U.S.) Note: Canadian Residents entering the U.S. without U.S. Immigration Documentation have an "Implied B-1" Immigration Status."

Travelers Ineligible for Travel Reimbursements or Benefits: In accordance with U.S. Immigration Law, Travelers with the following types of U.S. Immigration Status may not receive any form of payment from U.S. Sources, including travel reimbursements, during their stay in the U.S.

No U.S. Immigration Status obtained F-2 H-4 O-3 P-4

B. Indicate the type of immigration documentation you have to support your current or expected U.S. Immigration Status and attach a copy of that documentation to this form:

- Green Card
 I-94 Form
 Proof of Canadian Residency – only for Canadians with "Implied B-1" status in Item A above
 Other: Describe

C. Indicate your "primary" relationship to the University in connection with this travel: (Check one)

- Employee
 Independent Contractor (e.g., non-employee guest speaker or lecturer, honoraria recipient)
 Non - Employee (e.g., student, fellow or researcher): Describe relationship below

D. If you checked Non-Employee in Item C above, please indicate the "primary" purpose of your travel: (Check one)

- Travel "primarily" supported my individual educational or research goals; or
 Travel "primarily" benefited the University: Describe benefit to University:

E. Complete this item only if you have (or expect to have) a B-2 or WT immigration status: (Check one choice for both Items 1 and 2 and list dates in Item 1)

1. The period of my academic activity at UCSB [will or won't] be 9 days or less

List dates - From: To:

2. I [have or have not] been reimbursed for reasonable travel and incidental expenses incurred in connection with a usual academic activity from more than 5 educational institutions in the previous six-month period.

TRAVELER'S SIGNATURE _____ DATE _____

TRAVELER'S PRINTED NAME _____

STATE PRIVACY NOTICE

The state of California Information Practices Act of 1977 (effective July 1, 1978) requires the university to provide the following information to individuals who are asked to supply information about themselves.

The principal purpose for requesting the information on this form is to determine that you are eligible to receive payments or benefits from the University (e.g., travel reimbursements). Such eligibility is dependent on proof of lawful presence in the United States in accordance with U.S. immigration laws.

Furnishing all (or specifically designated) information requested on this form is mandatory. Failure to provide such information will prevent you from receiving travel reimbursements or benefits from the University.

Information furnished on this form may be used by U.S. Citizenship and Immigration Services and will be transmitted to other State or Federal governments as required by law.

Individuals have the right to review their own records upon request.