



TRAVEL PROCEDURES

Travel is an important part of your research efforts. It is also an area that is subject to many rules and regulations. Please help us to help you by reviewing the items below **before** making travel arrangements.

CONCUR DETAILS

The Materials Department assigns staff travel preparers based on faculty member. Your staff travel preparer will complete requests and expense reports in concur on your behalf. Requests will be submitted by staff. Expense reports will be prepared by staff and reviewed and submitted by you (in most instances- students paid on fellowship do not have access to Concur and will need to work with their travel preparer to be processed as a guest). When giving your staff preparer delegate access please give them all permissions (check all the boxes).

[How to Add a Delegate](#)

BEFORE YOU TRAVEL

Prior approval is required for all travel to ensure proper agency approval, advisor approval and funding approval for proposed travel. **It is imperative that the travel preapproval form be completed and submitted prior to making travel arrangements.** Your concur delegate will get needed signatures and enter the approval as a concur request for you. This form must include funding information, please ensure you have discussed the funding source with your PI/advisor before submitting the form.

[Travel Approval From](#)

[BFS Travel Quick Reference Guide](#)

[Bulletin G-28 - Policy and Regulations Governing Travel](#)

Travel advances are payments made before a trip takes place and can be issued for expenses incurred, such as airfare and registration fees. If you need an advance, please indicate this on the travel approval form. **Only one advance can be processed for each trip.**

- Advances requested prior to 30 days before the start of the trip can only be made for costs already incurred (usually registration and airfare) and must include itemized receipts (showing proof of payment).
- Advances requested within 30 days of the start of the trip can include costs already incurred and costs that will be incurred while on the trip (meals and hotel).

ACCOUNT NUMBERS

When filling out travel forms, you will need an account name and number to which the expenses will be charged. Please also provide the project code, if available. Indicate any accounts that will be used (i.e. Doctoral Student Travel Grant). If funding is split across departments, please follow guidelines for the majority department.

DURING YOUR TRAVEL

As a traveler on University funding, it is your responsibility to ensure that your travel expenses are reasonable and well-documented. Please do not pay for travel expenses on behalf of other group members.

Reimbursement requests should only be for your own expenses.

Please keep receipts for all of your transportation expenses (airfare, rental car, taxi, metro, bus), lodging, parking, baggage fees, etc. When requesting reimbursement for travel expenses such as airfare, rental cars, lodging and registration fees, we require an itemized receipt showing payment confirmation. We cannot accept quotes or estimates.

AFTER YOU TRAVEL

Submit a reimbursement form and all receipts to your staff preparer in a timely fashion. Submit receipts electronically when possible. When submitting paper receipts please place in an envelope to prevent loss.

It would be greatly appreciated if you use the following naming convention for sending receipts electronically – LastName.ExpenseType (i.e., Thorndyke.Hotel). Please add the date or amount if there are multiple receipts of the same type (i.e., Thorndyke.Uber \$13.48).

All travel expense claims should be submitted to the UCSB Travel Accounting Office within a reasonable period of time not to exceed 45 days after the end of the trip. Travel reimbursement requests submitted after 45 days may be subject to employee tax reporting.

THINGS TO NOTE

PERSONAL TIME

If your purchased airfare includes personal time or is indirect (not between SB/LAX and the business destination), please **print or save a quote** that shows what the cost of airfare would have been for direct travel on business dates. Submit the quote in addition to your actual airfare receipt. The quote should be printed on the same date that you actually purchase your ticket. You be reimbursed for whichever is less (actual travel or quote).

AIRFARE

Airline tickets can be purchased once travel approval is obtained. Students, Post-Docs and Visiting Researchers are responsible for making their own flight reservations. **Traveler must use a U.S. carrier (economy class).**

Please reach out with questions about airfare before booking.

Original itinerary showing cost of ticket and method of payment required for reimbursement.

LODGING

An original itemized hotel receipt must accompany requests for reimbursement. Room charge and tax must be itemized separately from other expenses charged to the room. The maximum room rate is \$275 per night before taxes and fees. Reimbursement for lodging is not allowed when the total trip is less than 21 hours.

If you share a hotel room, please request that the invoice is divided accordingly. This is especially important if you and your roommate(s) are not funded on the same account. Failure to do so may delay your reimbursement.

MEAL ALLOWANCES

Currently, we do not require receipts for meals during travel, but there is a \$79/day maximum allowance. **This is NOT to be treated as a per diem rate.** You should report meal expenses on the meal based on the actual expenses you have incurred. You will be required to provide meal receipts if you appear to be treating the daily maximum allowance as a per diem (please keep receipts until the expense has been approved). Alcohol expenses are not a reimbursable travel expense and should be omitted from your request. **There is no meal allowance for domestic trips under 24 hours.**

MILEAGE ALLOWANCES

Reimbursement of 65.5 cents a mile is allowed when personal vehicles are used. Vehicle license plate number must be provided when claiming mileage for a personal vehicle. Personal vehicles must have liability insurance in order to receive reimbursement. Concur calculates mileage based on starting and ending addresses.

REGISTRATION FEES

If necessary, registration fees may be paid by a Travel Advance if submitted more than 2 weeks prior to trip. However, if the trip is less than 2 weeks away, there may not be enough time for the conference to receive payment before its start date. In that case, the traveler should pay it. In both cases, receipts will be required for reimbursement.

MEMBERSHIPS

Memberships are reimbursable with travel if they allow you to receive discounted registration fees and savings on the total travel expense. Please provide documentation of the reduced registration expenses that the membership enables.

RENTAL VEHICLES

Intermediate or smaller vehicles are allowed. If a larger car is needed, please contact your travel preparer for preapproval. UC has corporate agreements with some vehicle rental agencies. Their UC contract price includes extra insurance for Loss Damage Waiver, Collision Damage Waiver, Supplemental Liability Insurance and Liability Insurance Supplement. Travelers will not be reimbursed for this personal accident insurance for rental vehicles (exception: foreign travel). Booking through Concur guarantees the traveler has the corporate rates and extra insurance.

FOREIGN TRAVEL

Canada and Mexico are considered domestic travel.

In some cases, prior approval by a funding source is required from agency for foreign travel. **Always confirm approval in advance of any plans.** Required agency approval varies from 60-90 days prior to trip.

You must use a U.S. Flag carrier for air transportation to foreign countries, unless specific instances apply, such as, if there are no US carriers available you may request an exception through proper channels to use a foreign carrier.

Foreign per diem rates (lodging, meals and miscellaneous) vary by date and city. Rates may be obtained from your travel preparer. Please visit the website below to view foreign per diem rates: defensetravel.dod.mil

GRADUATE STUDENT TRAVEL GRANT

The [Graduate Division](#) awards travel funds to graduate students one time per academic career. The student must fill out an application and submit it to the Graduate Division. If approved, for reimbursement purposes, please submit a copy of the award letter to your travel coordinator.

For more information and applications, contact the Student Affairs Office at (805) 893-4601.

CANCELLATIONS

Travel Advances: Traveler is required to refund any advance immediately when a trip is canceled or indefinitely postponed. (Refund checks should be made payable to UC Regents.)

Tickets: Traveler is responsible for the cancellation or any changes made to reservations. If the trip itinerary is changed or canceled en route, do not throw away any unused portion of tickets. Unused tickets must be submitted for refund.

3RD PARTY BOOKING SITES

We discourage the use of 3rd party booking sites (i.e., expedia, hotels.com) as they do not always provide the needed information as required for reimbursement by BFS and this can delay reimbursements being processed.

RESTRICTED STATE TRAVEL

Assembly Bill No. 1887 (AB 1887) prohibits state-funded travel to states that have passed a law that authorized discrimination based on sexual orientation, gender identity, and gender expression; or repealed existing state or local protections against such discrimination. As of July 1, 2023 there are 23 restricted states. If you plan to travel to one of these states, please reach out with questions ahead of time. [FAQs on AB 1887](#)