

Council of University Staff Assemblies
Guidelines and Procedures for CUCSA Travel Reimbursement
(Senior Delegates and CUCSA Officers Only)

The following guidelines and procedures have been developed to facilitate and expedite processing of expense reimbursements related to CUCSA travel by CUCSA officers and senior delegates. All guidelines are subject to UC Travel policy in addition to the travel policies for each location. Junior and LBNL delegates are not covered by these procedures. However all junior delegates are encouraged to seek prior approval for meal reimbursements from their home campuses if they are not incurring an overnight stay (policy on “Travel of Less Than 24 Hours”). Host campuses may fall under business entertainment policies and not travel policies.

- Campus and UCOP locations are expected to fund participation of at least one delegate. Currently all delegates from Lawrence Berkeley National Laboratory are reimbursed by their home location.
- CUCSA will continue to strive to support its goals and operations while attempting to control costs. Your cooperation and teamwork are much appreciated.

Policy:

University travel policy currently states:

When the entire length of a trip is *less than 24 hours*, Meals and Incidental Expenses (M&IE) shall not be reimbursed unless the travel includes an “overnight stay” as supported by a lodging receipt.

Senior delegates and officers who are not incurring an overnight stay should check ahead of time with the Chair Elect about submitting any meal or mileage reimbursement requests as they may be denied.

Basis for Reimbursement:

- Reimbursement for lodging and meals will be based on actual costs and receipts.
- If an item on your expense report does not have a corresponding receipt the expense will not be reimbursed by CUCSA.

Lodging and Meals:

CUCSA will reimburse for a one-night lodging (including applicable taxes).

- For locations that cannot get early morning flights CUCSA will consider reimbursement for a two-night stay (at maximum).
 - This is subject to the approval of the Chair Elect.

The following expenses will not be reimbursed by CUCSA:

- fax and/or telephone charges,

- other business center charges,
- Internet connection will be covered if not provided by the hotel.
 - Internet service will only be reimbursed for those delegates who must do University related business while attending the CUCSA meeting.

Due to budget limitations CUCSA has a lower cap on daily meals and will only reimburse actual meal costs up to the current CUCSA cap costs per day (not the UC daily meal cap). In general CUCSA will reimburse:

- Thursday night dinners not to exceed \$40.00
- Friday lunch not to exceed \$15.00
- Friday dinner not to exceed \$15.00 and will *only* be reimbursed if arrival at home location occurs after 8:00 pm.

For September meeting only:

- Wednesday lunches not to exceed \$15.00
- Wednesday dinner not to exceed \$25.00

Per UC policy, travel longer than 12 hours but less than 24 hours will only be reimbursed for a maximum of **\$42**. This is considered local travel for delegates living less than 30 miles from the meeting location.

While these are the maximum allowable costs it is expected that CUCSA delegates will exercise prudence in meal choices. Excessive meal expenditures may be denied by the CUCSA Chair Elect.

There is no reimbursement for meal costs if a meal has been provided by the host location.

Alcoholic beverage purchases will not be reimbursed and should be placed on a separate receipt from reimbursable expenses.

All costs must be kept at a reasonable minimum for all CUCSA delegates.

- Exceptions will be approved by the Chair Elect upon submission of documentation showing the economy of deviating from this norm.

Transportation:

Because CUCSA meetings are scheduled well in advance for the entire year you are asked to purchase tickets at the lowest fare. If you plan to combine your travel to the meeting with other travel, CUCSA will cover the portion of your travel that is equivalent to roundtrip coach airfare between your home and the meeting location (as specified below).

- Senior Delegates and Officers who will be reimbursed for their travel by CUCSA must make their air travel arrangements through **Southwest Airlines** on-line at least six months in advance, purchasing the lowest possible fare.

- Delegates who or host locations that do not have access to Southwest Airlines must purchase the lowest fare possible from a carrier directly such as American or United Airlines.
- Given CUCSA's restricted budget Senior Delegates and Officers should not purchase tickets through UC Travel.
- If you use an alternative form of transportation such as car or train, reimbursement will not exceed that of the applicable coach airfare.
- If train fare is significantly less expensive, and it is reasonable, the Chair Elect may recommend that some campus travel to certain locations be by train or car.
 - Personal auto mileage:
 - * if you drive to the meeting you will be reimbursed at the current University rates,
 - * maximum reimbursements will not exceed the cost of round trip couch airfare plus ground transportation.
- Alternate modes of transportation that require an additional night's lodging at a lesser cost than coach airfare may be recommended and/or approved by the Chair Elect.
- Where suitable and more economical, please share a ride with a fellow traveler or use an airport shuttle in lieu of taxicab.
- Prior CUCSA approval is required for car rental including University vehicles. If both Senior and Junior Delegates travel together in a vehicle, CUCSA will reimburse appropriate costs only once.
- CUCSA will not reimburse for packages that include hotel and rental car.

Processing:

- CUCSA reimburses travelers directly and not through their locations.
 - Travelers are responsible for tracking their own expenses and sending the appropriate documentation for their reimbursement. Also a copy of expense reports should be kept as documentation for the traveler's records, before submitting, since a copy will not be made for them after submission.
- Travelers are expected to submit their travel expense report and corresponding receipts (both are required for the request to be considered complete) and a duplicate copy to the CUCSA Chair Elect no later than 10 business days following the CUCSA meeting.
 - Incomplete expense reports or reports submitted after this timeframe may not be reimbursed.
 - Expense reports submitted without a duplicate copy are subject to delay.

- If receipts are faint please handwrite amounts next to the receipt.
 - Please make sure receipts are securely taped to a full sheet of paper.
 - Multiple receipts may be attached to the same page.
- Following these procedures will facilitate the timely reimbursement of your CUCSA travel expenses.
- Timely submission by travelers of their reimbursement request is key to the timely processing of their reimbursement.

If there are any questions please free to contact the CUCSA Chair Elect Directly.