



To All Students within Student Government Student Media:

As an organization that receives funding from student fees on the UCI campus, it is stated that all travel procedures must follow University policy G-28 and any guidelines as specified with UCI Accounting & Fiscal Services. Below you will find all the policies and requirements when traveling on the behalf of Student Government Student Media and UC Irvine.

CURRENT MESSAGE: It is highly recommended that students attend as many virtual events as possible for the upcoming year. If an event/conference provides a virtual option, students must automatically opt for the virtual method. If there is no virtual option, students will be required to provide proof and provide a reasoning of the necessity of attendance in-person. Our department will review and provide approvals based off of need and safety precautions to the student/delegation. Based on the campus COVID-19 Vaccination Policy, all students who request in-person travel will need to provide proof of vaccination. Un-vaccinated students will not be able to travel on behalf of SGSM and UCI and will not be reimbursed for any travel costs. In accordance with the Executive Directive on Travel, student travel will be limited to academic and work-related only. Recreational travel, such as off- campus retreats and team outings, will not be permitted at this time.

All highlighted statements within this document will pertain to current return to campus/COVID-19 policies.

University Student Travel Policies

I) POLICY SUMMARY

- A. It is the policy of the University to comply with IRS regulations regarding the provision and reimbursement of business-related travel, and to conform to the IRS “accountable plan” rules.

II) DEFINITIONS

- A. **Business Purpose:** The business purpose of a University traveler may include activities that contribute to any one of the University’s major functions of teaching, research, patient care, or public service, or to any other substantial and bona fide University business activity.
- B. **Headquarters:** The place where the major portion of the traveler's working time is spent or the place to which the employee returns during working hours upon completion of special outside assignments.
- C. **Lodging:** Expenses for overnight sleeping facilities. This does not include accommodations on airplanes, trains, buses, or ships, which are included in the cost of transportation.
- D. **M&IE Reimbursement Cap:** The maximum amount authorized for daily meal and incidental expenses established by the University for all travel of less than 30 days in the continental United States (CONUS). Travelers may seek reimbursement only for their

*= additional information added for SGSM departmental requirements of travel and travel reimbursements.

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actual expenses up to the cap amount (see Section V.E.2.a.i., Travel – Assignments of Less than 30 Days). For purposes of the reimbursement cap, incidental expenses include tips and fees for services, e.g., for waiters, baggage handlers, etc.

- E. **Residence:** The primary residence where the traveler lives, regardless of other legal or mailing addresses. However, when an employee is required to reside temporarily away from his or her permanent residence because of official travel away from headquarters, such residence may still be considered permanent if it is unreasonable to expect the employee to move his or her permanent residence to the temporary job location.
- F. **Travel Expenses:** Expenses that are ordinary and necessary to accomplish the official business purpose of a trip. Refer to the following sections for a description of travel expenses eligible for reimbursement: Section V.D., Transportation Expenses; Section V.E., Subsistence Expenses; and Section V.F., Miscellaneous Travel Expenses.
- G. **Travel Status:** The period during which a traveler is traveling on official University business outside the vicinity of his or her headquarters or residence.

III) PROCEDURES

A. Travel Requests*

1. Travel Form

All students traveling on the behalf of any department under Student Government Student Media, SGSM, or the University of California, Irvine must fill out the SGSM Travel Form. The form will be used to book any travel accommodations that is being requested for direct billing to the department as well documenting student travel. If a student is paying for all travel accommodations out of pocket, an SGSM Travel Form is still required for our end of the year CLERY Act report. Students should submit SGSM Travel Forms 30 days prior to departure when possible. Travel booking requests submitted less than 30 days may not be accommodated by the SGSM professional staff.

***Students attending virtual events may submit their requests 30 days prior to the event.**

2. Large Group Travel Requests

Large groups traveling on the behalf of the University must have a delegation roster submitted to their respective SGSM professional staff along with the initial Travel Request Form.

3. Risk Services Waiver

All students must complete a Risk Services liability waiver prior to departure of the trip. Students who fail to fill out the waiver will not be permitted to travel and will not be reimbursed for any expenses.

B. Payment of Travel

1. Prepaid Expenses and Direct Charges*

Students are prohibited from charging hotel and hotel-related expenses directly to the University. However, campuses may enter into a direct billing arrangement with a hotel for the payment of charges on behalf of travelers for

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room and tax charges ONLY. Airbnbs are not allowed to be directly billed to the department. Campuses should ensure that travelers are aware of such arrangements. Transportation tickets and conference fees may also be charged directly to the University if the proper controls are in place. Meals and miscellaneous expenses cannot be charged or billed directly to the University as these expenses must be paid by the traveler when they are incurred, and a check request for reimbursement submitted at the conclusion of the trip.

(Section V.B.1 of Policy G-28)

2. Payment of Expenses on Behalf of Others

University travelers normally shall not be reimbursed for expenses paid on behalf of other persons; however, limited exceptions are permitted such as in the case of co-travelers who are sharing a room. Exceptions to this rule, such as supervised group trips, must be approved in advance.

(Section V.B.5 of Policy G-28)

3. Cancellation of Reservations

Travelers who are unable to honor a reservation shall be responsible for canceling the reservation in compliance with the cancellation terms established by the hotel, airline, etc. The traveler must return any refundable deposits to the University. Charges or lost refunds resulting from failure to cancel reservations shall not be reimbursed unless the traveler can show that such failure was the result of circumstances beyond the traveler's control. The traveler shall be responsible for promptly returning for a refund any unused or partially used transportation tickets.

(Section V.B.5 of Policy G-28)

C. Insurance for Travelers

1. University Travelers

All University travelers, including employees, medical residents, students, and fellows, are covered worldwide, 24 hours a day, for a wide variety of accidents and incidents while on official travel status. The coverage includes accidental death, accidental dismemberment, paralysis, and permanent total disability. The coverage also includes travel assistance services when the traveler is 100+ miles from his or her home or headquarters, such as:

- Security extraction (security extraction is not subject to mileage limitation),
- Emergency medical evacuation and repatriation,
- Repatriation of remains,
- Out-of-country medical,
- Loss of personal effects (employees only), and
- Other travel assistance services. In addition, all University employees are provided with workers' compensation coverage for a work-related injury or illness that occurs during a University approved and funded business trip.

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- i. Travelers must register all out-of-state and foreign country business trips to ensure coverage. Booking travel through Connexus' preferred travel agencies and supported online booking tools, with the exception of SWABIZ (Southwest), automatically enrolls the traveler in the insurance program for travel outside of California; otherwise the traveler must register on the Risk Services website and complete the Traveler Insurance form before an out-of-state trip occurs. Registration is not required for travel within California as coverage is automatic.

[\(https://ehs.ucop.edu/away/\)](https://ehs.ucop.edu/away/)

(Section V.C.1 of Policy G-28)

D. Transportation Expenses

1. General

a. Surface Transportation Used in Lieu of Air Travel

If advance approval has been obtained, a traveler may use surface transportation for personal reasons even though air travel is the appropriate mode of transportation. The cost of meals and lodging, parking, mileage, tolls, taxis, and ferries incurred while in transit by surface transportation may be reimbursed. However, such costs shall not exceed the cost of airfare, based on the lower of the regular coach fare available for the location of travel from a standard commercial air carrier or the campus travel program fare, plus transportation costs to and from the terminals.

(Section V.D.1.e of Policy G-28)

b. Indirect or Interrupted Itineraries

Obtaining advance approval is suggested when a traveler takes an indirect route or interrupts travel by a direct route, for other than University business. Any resulting additional expenses shall be borne by the traveler. The reimbursement of expenses shall be limited to the actual costs incurred or the charges that would have been incurred via a usually traveled route, whichever is less.

(Section V.D.1.f of Policy G-28)

c. Travel Extended to Save Cost

Additional expenses associated with travel extended to save costs, e.g., a Saturday night stay for domestic travel, may be reimbursed when the cost of airfare would be less than the cost of airfare had the traveler not extended the trip (provided the expenses were incurred in compliance with this Bulletin). Such expenses, which include lodging, car rental, and M&IE (subject to the reimbursement caps set forth in Appendix B) incurred within the vicinity of the business destination, shall not exceed the amount the University would have paid had the traveler not extended the trip.

(Section V.D.1.g of policy G-28)

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2. Air Travel

a. Seating

Coach Class. Coach class or any discounted class shall be used in the interest of economy. This policy applies to all travel (domestic or foreign, or any combination thereof) regardless of the purpose or fund source.

(Section V.D.2.a of Policy G-28)

b. Flight Preferences/ Departure Airports*

Students may submit flight preferences to their respective professional staff through the SGSM Travel Form. If no flight preference is stated, the professional staff will book based off cost, efficiency, and time for the traveler. Student groups of five or less may choose the most convenient airport to depart based off residency or current location status. Groups of more than five must leave from the same airport.

3. Automobiles

Travelers may use their private vehicle for business purposes if it is less expensive than renting a car, taking a taxi, or using alternative transportation, or if it saves time. When a person is authorized to travel by automobile (e.g., when an automobile is the most economical and practical mode of transportation given the requirements of the trip) actual M&IE incurred en route plus the cost of lodging, when appropriate, may be reimbursed. However, a minimum of 300 miles a day must be driven by the most direct route in order to obtain the M&IE and lodging reimbursement.

(Section V.D.3 of policy G-28)

a. Mileage Calculations*

Only the driver may claim reimbursement for mileage. The rate for mileage is calculated using the most current IRS regulations. The calculation is based off the number of ways driven, mileage, and the IRS mileage reimbursement rate.

- i. Example: Point A (headquarters) to point B (location) is considered one way. Point B back to Point A is considered another way. A round trip consists of two ways.

(# of ways) x (miles of point A to B) x (IRS rate) =amount reimbursed

(Section V.D.3.a.i of Policy G-28)

b. Mileage Guidelines*

Mileage shall ordinarily be computed between the traveler's headquarters and the destination. Expenses for travel between the traveler's residence and headquarters (commuting expense) shall not be allowed. However, mileage expenses may be allowed between the traveler's residence and the destination if University business travel originates or terminates during a weekend or university holiday. When a

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traveler is authorized to drive a private vehicle to or from a common carrier terminal, mileage may be reimbursed as follows:

- One round trip (two ways), including parking for the duration of the trip; or
- Two round trips (four ways), including short-term parking expenses.

If a student who is not on travel status has a temporary assignment away from campus, reimbursement shall be made for mileage expenses incurred between the campus and the assignment location, or home and the assignment location, whichever is less.

- i. Examples: driving to a location to pick-up materials or driving to and from office socials.

(Section V.D.1.d of Policy G-28)

c. Insurance*

When private vehicles are used on University business, students will be required to provide copies of their driver's license and automobile insurance prior to the departure of their travel. Any student who fails to submit proper insurance and license documentation will not be reimbursed for travel expenses incurred during their use of the private vehicle. The minimum prescribed liability insurance coverage is as follows: \$50,000 for personal injury to, or death of, one person; \$100,000 for injury to, or death of, two or more persons in one accident; and \$50,000 for property damage. When a private vehicle operated by a student on official University business is damaged by collision or sustains other accidental damage, reimbursement for repairs borne by the employee may be authorized up to \$500 or the amount of the deductible (co-insurance), whichever is less. Expenses that can be recouped from insurance are not eligible for reimbursement. The amount reimbursed shall be based on receipts submitted by the student to the individual who authorized the travel.

(Section V.D.3.a.iii of Policy G-28)

d. Rental Cars*

A vehicle may be rented when renting would be more advantageous to the University than other means of commercial transportation, such as using a taxi. Advance reservations should be made whenever possible and may include up to an intermediate-size model, per the terms of UC-negotiated rental agreements. Vehicles up to an intermediate-size model should be used unless a no-cost upgrade is provided. Refueling of the car through the car rental agency may be reimbursed if fuel is cheaper or the same price as outside gas stations. Students will be responsible for fueling the car to the level of when rented and choosing

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fuel that is the cheapest during that time of travel. Original receipts for the gas must be turned into SGSM post travel for any reimbursement. Use of other higher cost upgrades requires exceptional approval.

(Section V.D.3.b.i of Policy G-28)

i. Rental Car Vendors*

Rental cars are the responsibility of the student to book for their travel. SGSM will not book on the behalf of the traveler. When renting cars, students are highly recommended to go through the University travel portal, CONNEXUS, and with one of the following approved UC rental car agencies:

- **Hertz**
- **Enterprise**
- **National**
- **Dollar**
- **Thrifty**

Any rental car booking through third party agencies (Priceline, Expedia, etc.) will not be reimbursed. Please use the UC Corporate accounts with the vendors listed above to receive automatic coverage of the UC insurance, reduced rates, and young driver fee waived. When you pick up your vehicle, confirm that the UC agreement special rate ID is noted on the contract before you sign it. Also be sure to retain your receipt. You must submit an original, itemized receipt for car rental reimbursement. Driver's license and proof of insurance are not required when renting a vehicle through the UC Corporate accounts, as that will be the responsibility of the rental agency. For any questions about the UC Corporate account, please see your designated SGSM professional staff.

<https://www.accounting.uci.edu/travel/book/renting.html>

4. Other Transportation

For all policies on forms of transportation not listed above, please look through Section V.D.4 – Section V.D.6 of Policy G-28

E. Subsistence Expenses

1. General

a. Definition

Subsistence expenses incurred while on travel status consist of charges for lodging and meals and incidental expenses (M&IE). For purposes of the reimbursement cap, incidental expenses include tips and fees for services, e.g., for waiters, baggage handlers, etc. Expenses reimbursed must be ordinary and necessary to accomplish the official business purpose of the trip. Subsistence expenses incurred within the vicinity of

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an employee's headquarters or residence shall not be reimbursed. Regardless of the length of time for business travel, the traveler must be at least forty miles from the headquarter location or home, whichever is closer, to be reimbursed for an overnight stay.

(Section V.E.1.a of Policy G-28)

2. Travel in Excess of 24 Hours

An official University business trip begins when the traveler leaves his or her residence or headquarters, whichever occurs last, and ends when the traveler returns to his or her residence or headquarters, whichever occurs first.

a. Domestic Travel

For travel assignments of less than 30 days within the continental United States (CONUS), the reimbursement of daily subsistence expenses shall be based on the actual amounts incurred for lodging and meals and incidental expenses, subject to the maximum per day reimbursement cap. The M&IE cap for CONUS travel under 30 days shall not be treated as a per diem. M&IE reimbursement shall be limited to the actual reasonable costs incurred; subject to the daily maximum reimbursement cap set. Departments should remind their travelers that only expenses actually incurred are reimbursable. Travelers should be required to submit meal receipts if it appears that they are treating the cap as a per diem by routinely claiming the full M&IE amount. Lodging expense reimbursements are actual up to \$275 per night before taxes and mandatory hotel fees and must be supported by original itemized receipts, regardless of the amounts incurred, and must be reasonable for the locality of travel. When the traveler is unable to secure lodging at \$275 per night or less, the traveler must submit additional documentation such as price comparisons within the proximity of the meeting location that supports the higher lodging rate incurred. The price comparisons should be performed at the time of booking. A traveler who is required to attend a conference where the prearranged conference lodging rate exceeds the \$275 per night cap may stay at the conference hotel without exceptional approval.

(Section V.E.2.a of Policy G-28)

<https://accounting.uci.edu/travel/reimbursement/meals-incidentals.html>

b. Foreign Travel

Foreign travel shall be reimbursed in accordance with the Federal Maximum Travel Per Diem Allowances for Foreign Areas published by the Department of State. An official University business trip begins when the traveler leaves his or her residence or headquarters, whichever occurs last, and ends when the traveler returns to his or her residence or headquarters, whichever occurs first. Travelers should only claim actual travel expenses (e.g. subsistence and lodging) up to the per

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diem rate. If actual expenses that are greater than the per diem are claimed due to special or unusual circumstances, the traveler must document such circumstances by submitting a written explanation with the check request. The amount reimbursed, however, may not exceed 300% of the applicable federal rate established for the location of travel. The reimbursement of actual expenses must be supported by receipts. The following are some examples of special or unusual circumstances that warrant reimbursement of actual expenses:

- A traveler is required to attend a meeting or conference where meals and lodging must be obtained at a prearranged place, and lodging consumes all or most of the applicable maximum per diem allowance;
- The travel is to an area where the per diem is normally adequate, but subsistence costs have temporarily increased because of a special event or function, e.g., a national or international sports event; or
- Due to the situation described above, affordable lodging is not available within a reasonable commuting distance of the employee's meeting or conference and transportation costs to commute to and from the less expensive lodging facility consume most or all of the savings achieved from occupying less expensive lodging.

(Section V.E.2.b.i of Policy G-28)

c. Lodging with a Friend or Relative*

When a traveler lodges with a friend or relative while on official business for the University, a non-cash gift, such as flowers, groceries, or a restaurant meal, may be provided to the host. The actual cost of such a gift may be reimbursed up to \$75. Under IRS regulations, a receipt must be provided. **Only one gift per stay may be provided to a host.**

(Section V.E.2.e of Policy G-28)

3. Travel of Less than 24 Hours

When the entire length of a trip is less than 24 hours, M&IE shall not be reimbursed unless the travel includes an "overnight stay" as supported by a lodging receipt. The traveler must be at least forty miles from the headquarter location or home, whichever is closer, to be reimbursed for an overnight stay. If the traveler is unable to provide a receipt, he or she must include a statement with the check request explaining why a receipt is not available (e.g., the traveler lodged with a friend or relative, stayed overnight at the airport, or took alternative transportation that required the traveler to be away overnight). An exception to the overnight-stay requirement may be allowed when a traveler incurs a meal expense in connection with a business meeting (e.g., a working lunch scheduled as an integral part of a meeting or conference). The business

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purpose of the meal must be explained on the check request or substantiated by other documentation (e.g., an agenda), which should be attached to the check request. Reimbursement for the cost of the traveler's meal is allowed up to the maximum amounts set forth in BUS-79.

(Section V.E.3 of Policy G-28)

4. Payment of Group Subsistence Expenses*

The University may negotiate agreements with restaurants, hotels, and similar establishments to furnish subsistence to a group or groups of University employees when it is to the University's advantage. Under such an agreement, the vendor may be paid either by the group leader/chaperone or by billing the University when possible and appropriate. Reimbursement of such expenses may be claimed by group travelers as follows:

- a. Student groups that are being accompanied by an SGSM staff group leader with an office credit card may have that designated group leader pay for M&IE within the rates and per diem as stated in the policy. Student groups without an SGSM group leader must incur expenses and keep all documentation for the check request upon their return.

(Section V.E.4 of Policy G-28)

F. Miscellaneous Travel Expenses*

Miscellaneous expenses are reimbursable when they are ordinary and necessary to accomplish the official business purpose of a trip. The check request must include an explanation of why such expenditures are being claimed. Allowable miscellaneous expenses include the following:

1. Business office expenses such as word processing services; equipment rentals; fax and computer expenses; copy services; overnight delivery/postage; purchase of materials and supplies, when normal purchasing procedures cannot be followed; rental of a room or other facility for the transaction of official business; local and long-distance telephone calls (including one reasonably brief, nonemergency, personal call home per day); and laundering, cleaning, or pressing of clothing (if a trip exceeds six days).
2. Special fees for foreign travel, including the actual cost of obtaining a passport, visa, tourist card, and necessary photographs; cost of certificates of birth, health, identity, and related affidavits; charges for required inoculations and medical evacuation insurance; currency conversion and check cashing fees; the cost of traveler's checks; costs related to hiring guides, translators, and local labor; and the cost of full collision insurance on automobiles rented in foreign countries (see Section V.D.3.b.ii. for more information on insurance coverage).
3. Registration fees for attendance at conferences, conventions, or meetings of professional or learned societies.

Spouses/partners or students who join on trips will not be reimbursed any of their travel expenses through SGSM.

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(Section V.F of Policy G-28)

G. Check Requests

A check request shall be used to account for all travel advances and expenses incurred in connection with official University travel. When properly completed and approved, this form is used to reimburse the traveler for any additional amounts due.

1. Reporting Period*

The check request must be submitted to the disbursements/travel accounting office (or equivalent office on campus) within a reasonable amount of time not to exceed 30 days after the end of a trip. Travel reimbursement requests submitted after 30 days are left to the discretion of the Associate Director and Executive Director of SGSM, considering the facts and circumstances, whether the reimbursement will be made and if any reporting as taxable income will be required.

(Section V. I. 1 of Policy G-28)

2. Documentation

a. Receipts*

The original of the following receipts must be submitted with the check request:

- i.** Receipts for all airline expenses.
- ii.** Receipts for all lodging expenses incurred for domestic travel, except where per diems are authorized for lodging expenses (i.e., long-term travel, use of non-commercial facilities, etc.). Since hotel receipts may include charges that are not reimbursable, the traveler shall not be reimbursed for lodging expenses unless the receipt presented by the traveler contains itemized charges for the room, e.g., taxes, telephone, etc.
- iii.** Receipts for all rental car expenses.
- iv.** Itemized receipts for meal expenses.
- v.** Receipts for local transportation.
- vi.** Receipts for each miscellaneous expenses.
- vii.** Receipts for all extraordinary items, such as repair of accidental car damage, supported by appropriate justification.
- viii.** Receipts for gifts provided to a host.
- ix.** An agenda, itemized receipt, or other supporting documentation for all registration fees.
- x.** Any reimbursable item not specified above.

Per the request of the UCI Student Affairs Office, all receipts must be original and itemized. Photo or scanned receipts are not accepted. Electronic receipts are only accepted if that is the only form or receipt provided by the vendor.

(Section V.I.2.b.i of Policy G-28)

b. Meal Receipts*

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Alcohol during travel is not reimbursable through SGSM. All students at the legal drinking age of the United States who order alcohol must not combine receipts with their meal. All alcohol must be on a separate receipt.

c. Missing Original Receipts*

When original receipts are required but cannot be obtained or have been lost and all measures to obtain a duplicate receipt have been exhausted, a statement should be provided explaining why such receipts are not being submitted with the check request. The statement must include a certification that the amount shown is the amount actually paid and that the traveler has not and will not seek reimbursement from any other source. A bank statement, with all personal information redacted, must be provided along with written explanation.

(Section V.1.2.b.ii of Policy G-28)

d. Agenda*

Depending upon the nature of the trip, an agenda associated with the business reason for the trip is to be provided as part of the substantiating documentation.

(Section V.1.2.b.iii of Policy G-28)

IV) **SGSM GENERAL INFORMATION**

- A. When a check request is submitted, students may be emailed if there are any issues or questions regarding the trip or documentation.
- B. Upon check request approval, a check will be processed within 5-7 business days. All checks will be available for pick up in the SGSM Concierge desk unless requested to be mailed.

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