

6195 Etcheverry Hall, MC 1740, Berkeley, CA 94720-1740 Financialcluster@me.berkeley.edu

**DOMESTIC TRAVEL REIMBURSEMENT CHECKLIST**

**REIMBURSEMENTS SUBMITTED WITHOUT COMPLETE DOCUMENTATION WILL BE RETURNED. RATES (PRIVATE CAR MILEAGE, MAXIMUM DAILY MEALS & INCIDENTALS, MAXIMUM DAILY LODGING MAX, ETC) ARE SUBJECT TO CHANGE WITHOUT NOTICE.**

UC Berkeley Employee ID (EID) #, UC Berkeley Student ID (SID) #, UC Berkeley Vendor ID (VID) # is required

All **Non-UC Employees/Students** that are **Non-US Citizens** must attach a copy of their visa, passport, passport entry stamp page, and [I-94/ESTA](#) and fill out a [UCB W-8BEN](#). Please note that **International Visitors** must also submit the Certificate of Academic Activity which is available at: <http://ucop.edu/financial-accounting/files/taxation/coaa.pdf>. **U.S. Permanent Residents (Green Card holders)** must provide a copy of their Permanent Resident card.

If submitting a **Faculty relocation** reimbursement, please contact [financialcluster@me.berkeley.edu](mailto:financialcluster@me.berkeley.edu)

Trip purpose and Event info - must specifically state the trip's purpose. Event Flyer/Brochure/Agenda or Invitation letter/e-mail showing meeting dates, times, and locations of Event is required.

Airfare - Economy/Coach Class (including economy-premium/plus/elite) are allowed. Upgrades such as Business or First Class airfare, require additional documentation and pre-approval. Please provide Direct Bill ID if airfare was directly billed. Flight itinerary/airfare receipt is required for **ALL** travel requests (even if the airfare expense is not being claimed). If trip duration exceeds eight days, please attach additional travel form(s) to report meals and lodging expenses. Per University Policy, travel reimbursement requests must be submitted **within 45 days** of the end of a trip. Otherwise, a justification for the late submission must be provided. If trip includes multiple destinations, please complete a **separate** Travel Form for each leg/destination to itemize expenses for each segment of the trip.

If reimbursement request includes an indirect route, personal days, or upgrades, obtain a comparison airfare quote at the **time of booking** (at least 14 days in advance of the trip) for the equivalent of a strictly business trip in economy class. The lesser of the actual costs & comparison flight would be the allowable amount for reimbursement.

Mileage reimbursements (\$0.58/mile) (effective 01/01/19) require a map with driving directions (e.g. from [maps.google.com](https://maps.google.com)) for mileage verification. Relocation mileage is \$0.20/mile (effective 01/01/19). Gasoline expenses may **not** be reimbursed in addition to the mileage rate.

Rental car - can be up to an **intermediate** size car. Receipt must be final, show detailed charges and proof of payment. It is recommended that you book your car rental through [Connexus](#) for your *business travel within the United States and Canada* so that your reservation is on a UC negotiated contract which normally allows for the rental to be automatically covered by UC's rental car insurance (This is NOT applicable to personal rentals). Please see: <http://www.me.berkeley.edu/sites/default/files/services/Car%20Rental%20Tips%20-%20Connexus.pdf>

If you choose to drive to a destination normally traveled to via air, pre-approval should be sought and a written statement explaining the circumstances will be expected for reimbursement. You will be reimbursed the lesser of mileage based on the most direct route or an amount equal to the cost of flying Coach/Economy with advance booking. When driving between locations, you are expected to travel more than 300 miles/day in order to claim expenses for overnight lodging and meals.

Our internal policy requires itemized receipts (e-Tickets accepted for airfare) for ALL expenses regardless of amount. Receipts must show method of payment (i.e. Visa + last 4 digits of the card) and the name on receipts must match Traveler's name. Hotel/lodging folios must list room, tax, service, and any other charges separately and must show a zero balance at checkout.

Travel Insurance - offered free of charge to all UC employees and students on official UC business trips. Sign up for University Travel Insurance **PRIOR** to departing. Please see <https://travel.berkeley.edu/obtain-travel-insurance>

Meals and Incidentals - Only **ACTUAL** expenses may be reimbursed. If a trip is less than 24 hours, meals are NOT reimbursable, unless there was a business need for an overnight stay. Effective 10/1/17, meals and incidentals may **not** exceed \$62 total per day. Daily limits are subject to change without notice. Please see <https://travel.berkeley.edu/understand-policy/travel-policy-nutshell>

Lodging - The traveler must be at least 40 miles from the headquarter location or home, whichever is closer, to be reimbursed for an overnight stay, unless the stay is required to meet a business need. Daily lodging limits for domestic trips under 30 days will be set at a \$275 room rate, excluding taxes and fees. When the traveler is unable to secure lodging at \$275 per night or less, the traveler must submit acceptable justification that supports the higher lodging rate.

It is *against* University policy to book internet travel packages of hotel/airfare/car rentals unless "each aspect of the package will be separately itemized (e.g., itemized hotel charges, airfare, car rental, etc) to assure appropriate documentation for reimbursement."

Traveler's signature and Fund source to charge. (Approval signature and printed name required for requests from non-Faculty members)

