

## UC Davis Policy and Procedure Manual

### Chapter 300, Travel and Transportation

#### Section 10, General Travel Policy

Date: 9/15/10

Supersedes: 300-10 through 300-26

Responsible Department: Accounting and Financial Services

Source Document: Business and Finance Bulletin G-28, Policy and Regulations Governing Travel

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#### I. Purpose

This policy provides the general rules and regulations regarding travel on official University business. All policy and regulations contained in Business and Finance Bulletin [G-28](#), Policy and Regulation Governing Travel apply to the UC Davis Campus and UC Davis Health System.

#### II. Definitions

All relevant terms are defined in [BFB G-28](#).

#### III. Policy

- A. All official travel shall be properly authorized, reported, and reimbursed in accordance with University travel regulations.

Under no circumstances shall travel expenses for personal travel be charged to or temporarily funded by the University.

- B. University employees traveling on official business shall observe normally accepted standards of propriety in the type and manner of expenses to incur.
- C. The traveler is responsible for planning University travel in a manner to minimize costs to the University and to report travel expenses in a responsible and ethical manner.

Per President Yudof's letter issued July 2009 and [BFB G-28](#), travel arrangements shall be made through Connexus, the system wide UC Travel Program booking portal, whenever possible.

- D. Individual University travelers normally shall not pay for the expenses of other persons or be reimbursed for expenses paid on behalf of other persons, except in the case of co-travelers who are sharing a room. Exceptions, such as supervised group trips, must be approved and the Group Leader designation granted by the Group Leader's department head.
- E. Per [BFB G-28](#), travel reimbursement procedures are designed to conform to the substantiation rules published by the Internal Revenue Service (IRS).

#### IV. Authorization and Approval

- A. In accordance with [BFB G-28](#), authorization shall be obtained from the traveler's department head prior to undertaking official University travel. Additionally, the Travel Expense Voucher or electronic equivalent must be approved by the traveler's department head prior to payment or reimbursement of expenses. Travelers who fail to obtain prior authorization may be liable for the expenses incurred
- B. To avoid the appearance of conflict of interest and ensure proper separation of duties, travelers may not approve any of the following:
1. Their own travel expenses.
  2. The travel expenses of an individual to whom they directly or indirectly report.

3. The travel expenses of a near relative.
- C. Travel expenses of the department head must be authorized and approved by the individual to whom he/she directly reports.
- D. Exceptions to travel policies may be granted by the individual designated in delegation of authority UCD [DA 137](#).
1. The request for exception must specify the purpose, circumstance or need, dates of travel, and name of the person to whom the exception is to be granted.
  2. When an exception has been granted, the reimbursement of expense shall be limited to the actual costs incurred, provided such costs are deemed to be ordinary and necessary under the circumstances, and must be supported by receipts.
  3. Exceptions to the daily M&IE cap for travel less than 30 days within CONUS are not allowed.

**V. Further information**

Contact the Accounts Payable and Travel Management unit of Accounting and Financial Services, (530)757-8888, <http://travel.ucdavis.edu>, email: [mytravel@ucdavis.edu](mailto:mytravel@ucdavis.edu).

**VI. References and Related Policies**

- A. Office of the President (<http://policy.ucop.edu>):
1. Business and Finance Bulletin G-28, Policy and Regulations Governing Travel.
  2. Policy Governing Travel to Scholarly Meetings and Field Research Travel.
- B. UCD Policy and Procedure Manual (<http://manuals.ucdavis.edu/PPM/about.htm>):
1. Section 370-05, Student Off-Campus Events, Programs, and Travel.
  2. Section 370-10, Student Off-Campus Trip Insurance.
  3. Section 370-25, Vehicle Insurance.