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We've Heard You - T&E Improvements

4 messages

Rosemarie Rae Associate VC - CFO (campus-wide) <CALmessages@berkeley.edu> Thu, Mar 19, 2015 at 3:01 PM
To: "Deans; Dept-chairs; Directors; Faculty; Senior-campus-admin; Staff" <CALmessages@berkeley.edu>

Dear Faculty and Staff,

In response to your feedback, the Office of the CFO and Campus Shared Services recently launched a project to improve the campus' processes for reimbursing travel and entertainment (T&E) expenses. The overarching goal of the project is simple: to make your T&E experience easier so you can focus on more important work that supports Berkeley's mission. With input from faculty focus groups and based on guidance from campus administrative officers, we're pleased to announce several policy clarifications related to our two key priorities:

1. Trust the integrity and judgement of the traveler by making it easier to submit and receive reimbursements. The majority of business travel conducted by employees occurs within the continental United States for less than 30 days, and we've streamlined the supporting documentation required to process your reimbursement in this scenario. (These policies do not apply to international travel.)

- **Per UC Policy, receipts are only required for:**

- o All airfare, car rentals, and lodging
- o Any single expense over \$75

- **No proof of mileage required for personal car use:**

- o You're no longer required to submit a MapQuest print-out to support the number of miles claimed

- **No evidence of business purpose required:**

- o You're no longer required to submit a copy of an agenda or presentation invitation
- o To satisfy IRS rules, on the expense report you must specifically state the business purpose, the dates, and place

2. Clear up confusion by simplifying policy. When employees are traveling domestically for less than 30 days, keep in mind:

- **Daily maximum for meals and incidentals is a total of \$71:**

- o Travelers must only request reimbursement for actual costs, up to \$71
- o Since receipts aren't required, you may wish to keep a log so you know how much to claim
- o Incidentals are tips and fees (e.g., baggage handlers, hotel staff, etc.)
- o Other miscellaneous business expenses (e.g., Internet service, meeting supplies, etc.) are reimbursable, but not calculated against the \$71

- **Rental car liability insurance is included with reservations made in Connexus:**

- o UC rental contracts with Hertz, National, Enterprise, Dollar, and Thrifty include liability insurance

- o If you reserved the car through Connexus, decline the additional insurance offered at the rental counter.

Sign up for Travel and Entertainment updates to stay informed about future policy and process simplifications related to making reservations, lodging, international travel, entertainment, and more. We'll also be announcing new communication tools, improving the customer service experience, and exploring options for system enhancements.

Your ideas, questions, and comments are always welcome. To contact the T&E Project Team, email Accounts Payable Manager Dan Parnas (dparnas@berkeley.edu).

Thank you,

Rosemarie Rae, Associate Vice Chancellor of Finance & Chief Financial Officer

Peggy Huston, Chief Operating Officer of Campus Shared Services
