



TRAVEL REIMBURSEMENT OVERVIEW FOR FACULTY

PRIOR TO TRAVEL

Let the IHC know ahead of time if you are traveling or hosting inbound travelers, and we can work with you on questions during the travel reimbursement process. Let us know: any reimbursement maximums, list of conference travelers, what kinds of expenses are expected, etc.

Contact financial@ihc.ucsb.edu for questions regarding travel reimbursement.

CONCUR – UC Employees Must Logon for Reimbursement

Concur is a campus-wide application **used for travel and entertainment reimbursement**. It enables travelers and entertainers to **create their own expense reports**. All active employees (or their assigned delegates) will need to create their own request for expense reimbursement in Concur. Employees or their delegates must be aware of the account string that the travel expenses will need to be charged to. If you have any questions, contact the IHC or refer to the [BFS website](#).

- [Login to Concur](#)
- [How to Create and Submit a Request](#) Video (1:56 min)
- [Guest Traveler \(non-UC\) Form](#) – complete this form to request new guest travelers to be added into the Concur system

Desktop Logon for UC Employees

- Access the site: at www.concursolutions.com
- Enter your full UCSB Net ID, including “@ucsb.edu” (ucsbnetid@ucsb.edu)
- Use SSO as authentication method (choose “Sign in with UC Santa Barbara SSO”)
- Log in on the UC Santa Barbara SSO site

Download the app for easy uploads

- Get the app for [iPad and iPhone](#)
- Get the app for [Android devices](#)

WHAT WE CANNOT REIMBURSE

- Travel expenses paid for by others
- Domestic travel
 - Over the \$275/day max for hotels (including tax) (contact business officer for exceptions)
 - Over the \$62/day max for meals and incidentals
- Foreign travel daily meal and hotel maximums listed by location here
- Car rental **insurance charges** – see *details below*
- Alcohol
- Car service/limousines
- Upgrades to Business Class/First Class
- Personal expenses

Any exceptions require a justification memo submitted in advance of the travel.

HOW TO GET REIMBURSED

- Fully complete [Domestic](#) or [Foreign Travel](#) Reimbursement Form
- DocuSign signatures are needed from both traveler and approver
- Include a flyer or agenda for the related event
- Have complete receipt documentation, which should include:
 - Date
 - What was purchased
 - Amount with sales tax breakdown
 - Proof of payment
 - Who paid – sign the receipt if this info is not included

All documentation is needed within 30 days of the end of the trip

Restricted Travel Law AB 1887

- UC has the responsibility to consult the list on the Attorney General's website in order to comply with the travel and funding restrictions imposed by the law. In addition, UC cannot require employees to travel to these states, regardless of funding source. Therefore, there can be no repercussions if an employee declines to travel to any state that is on the Attorney General's list of states where state-funded travel is prohibited.
- These states include: Alabama, Arkansas, Florida, Idaho, Iowa, Kansas, Kentucky, Mississippi, Montana, North Carolina, North Dakota, Ohio, Oklahoma, South Carolina, South Dakota, Tennessee, Texas, West Virginia
- AB 1887 provides a number of exceptions and does not affect travel that is paid for or reimbursed using non-state funds. It also does not apply to travel expenses that were incurred before Jan. 1, 2017. List of exceptions available [here](#)

ALTERNATIVES TO REIMBURSEMENT (see additional details below)

- Connexus direct bill for airfare
- Direct bill agreements with local hotels
- Travel Advances (UC employees/students only)

ADDITIONAL DETAILS

Rental Car Reimbursements

UC has a system-wide car rental program with Enterprise, Hertz, and National Rentals within the United States that includes full coverage for CDW and LDW. Drivers should **DECLINE** CDW/LDW/SLI, but make sure that the campus CDP# is printed on the traveler contract at the time of rental. If the number is not printed on the contract and there is damage to the car, drivers will be responsible for any damage claims made by the rental company and/or a third party.

Any purchase of additional insurance for rentals within the US is not a reimbursable expense (unless special circumstances apply – please check with your campus travel office first).

- Enterprise and National – CDP# XZ32A01
- Hertz – CDP# 72130
- Traveler needs to ask for University of California negotiated rate at time of booking and reference CDP numbers above.
- Cannot reimburse for additional insurance purchased with rental

Airfare Direct Billing

Can be charged directly to UC funds if purchased through CONNEXXUS*

- Begin online booking via <https://travel.ucop.edu/connexus/>
- Review itinerary and save as "ticket on hold."
- Forward the itinerary to jarred@ihc.ucsb.edu to request a Direct Bill Authorization Number (DBAN).
- Upon receipt of the unique DBAN for the trip, you can finish booking/purchasing the itinerary.

*must be an active UCSB employee to access CONNEXXUS

Hotels with direct bill agreements:

[Best Western South Coast Inn](#)

[Best Western Pepper Tree Inn](#)

[Franciscan Inn](#)

[Eagle Inn](#)

[Upham Hotel](#)

[Hilton Garden Inn](#)

Travel Advances

Reimbursements can be made prior to travel for pre-paid expenses, such as conference registration or airfare, if requested 30–90 days before departure.

1. Complete and sign a [Travel Advance Worksheet](#)
2. Submit Travel Advance Worksheet, conference schedule (if applicable), and original receipts
3. To close out the advance, submit a reimbursement worksheet with all trip expenses within 30 days of the end of the trip