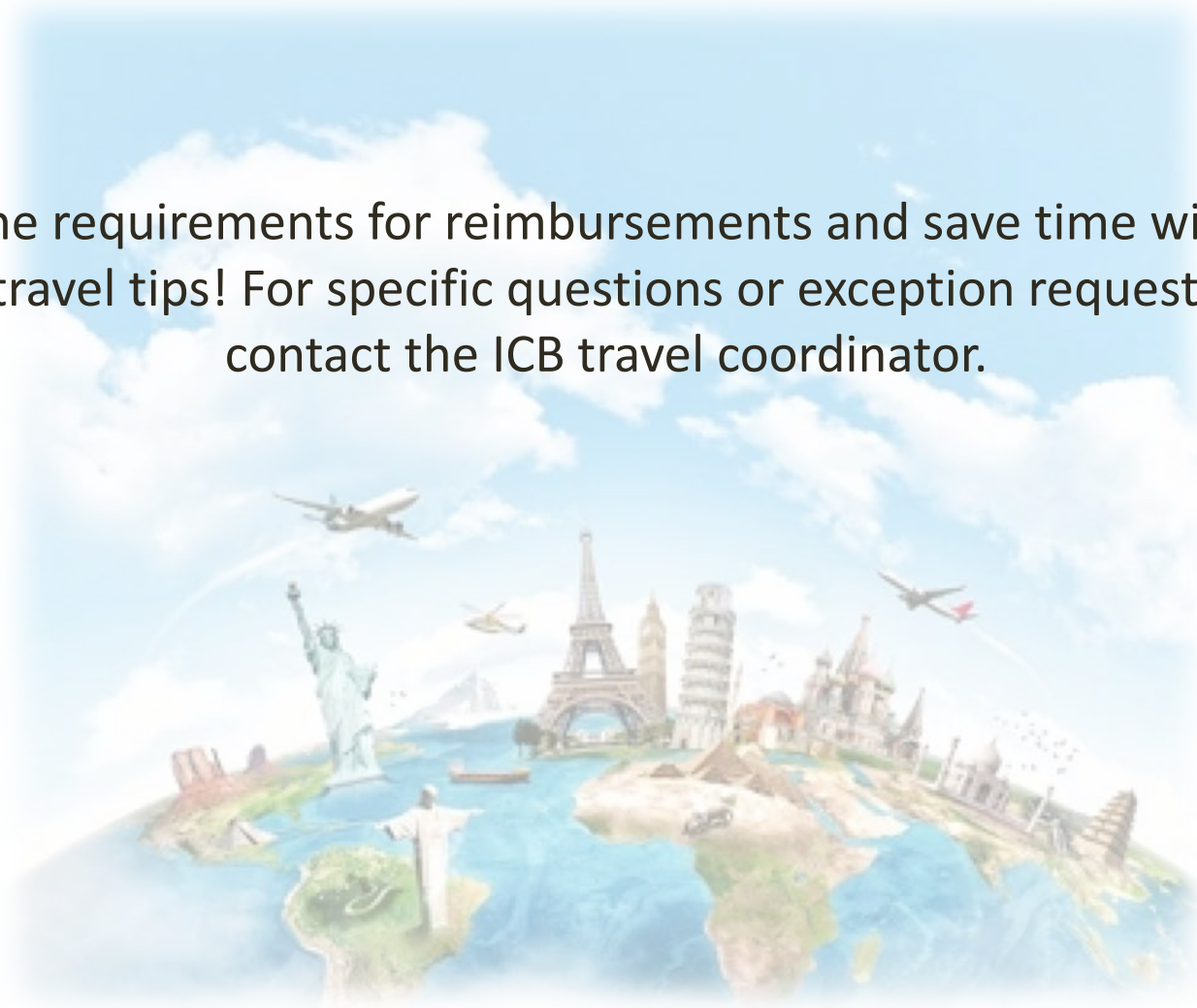


Travel

Helpful Tips for Planning your Trip!

Intro

Learn the requirements for reimbursements and save time with these helpful travel tips! For specific questions or exception requests, please contact the ICB travel coordinator.



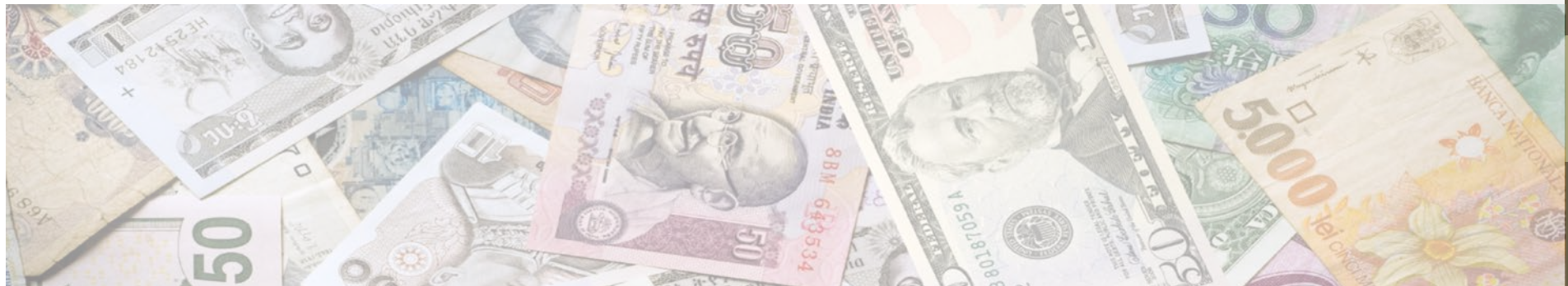
Before Booking

- Check if your travel is approved by your PI.
- Ensure your supporting project has sufficient funds for travel expenses.
- Set a reminder to submit your reimbursement packet ASAP. Reimbursement requests after 45 days following the end of a trip may be reported as taxable income.
- Keep in mind ICB and Business and Financial Services require 10 business days each for processing all reimbursements.
- Remember for both reimbursements and advances, all expenses must be compliant with [UC](#) and [ICB](#) policy.

Advances

Fill out a Travel Advance Worksheet from our website to get paid before your trip even starts! ICB policy still requires you to bring estimates with this form, so come prepared.

The catch? You **must** submit a reimbursement packet within 45 days after the end of your trip and pay back any left over funds. If you spend more than the advance you will be reimbursed!



Insurance

If you're traveling on UC business within California, you are covered by the UC Travel Accident Insurance Program.

For trips outside California register on the online insurance [form](#) before the trip. Or book your flight through Connexus and you'll be automatically enrolled! More info [here](#).





Connexus

Use Connexus! Connexus is a secure web portal where you can book airfare, car rentals, hotels and train tickets with UC preferred agencies at discounted rates! Check out the newly remodeled website by logging in with your UCSBnetID and password. Not sure which portal to use? ICB recommends using the BCD portal within Connexus to book your travel expenses.

Benefits of using Connexus:

- Option to bill flight to the ICB or pay with your personal card
- Automatic enrollment of insurance
- Price protection, BCD Travel will automatically rebook ticket at lower price if there is a drop within the first 24 hours of ticketing
- Free agent assistance for any questions regarding your trip
- Free perks & rewards when you use preferred agencies

To learn more, login to the portal and click “Why Connexus.”

Shorts Travel

Do you like to search for flights on a specific website? Use Shorts Travel's browser extension called FindIt to help you find the best prices comparable to UC rates! For more info, login to Connexus and scroll down to the Short's Travel booking portal under the Book Online tab.



Rethink Campus Travel

Search for flights and/or hotels at websites of your choice. Once you have selected your flight or hotel, FindIt® will apply any available UC rates and benefits and confirm your travel purchase through Short's Travel, one of UC's preferred Connexus agencies.



*UC preferred browser


Domestic Airfare

You **must** book a US airline. According to the Fly America Act ([FAA](#)) all ICB supported air travel must be on a US air carrier because we are funded by the US government. See FAA website for details and exceptions.


Check if your flight is compliant by looking at the airline next to the ticket number. Remember to choose an economy or coach class seat when you travel. See [UC Policy](#) page 16 for seating exceptions.


Preferred Airline for University of California [Hide all details ^](#)

DEPART ✕ **Mon, Feb 19** – Santa Barbara, CA to San Francisco, CA [Hide Details ^](#)

Mon, Feb 19 07:45a SBA → 09:00a SFO  **United 5982** [View seats](#)
Canadair Regional Jet / 165 lbs CO₂
Operated by SKYWEST DBA UNITED EXPRESS

RETURN ✕ **Thu, Feb 22** – San Francisco, CA to Santa Barbara, CA [Hide Details ^](#)

Thu, Feb 22 08:41a SFO → 09:59a SBA  **United 5579** [View seats](#)
E7W / 165 lbs CO₂
Operated by SKYWEST DBA UNITED EXPRESS

Fare Options	Free Checked Bags	Refundable		
Economy (M) Rules / Fare Details	0	No		\$595.04

International Airfare

You **must** book a US airline because of FAA. However, airlines from countries within the Open Skies Agreements are an exception to FAA. These agreements are between the U.S.— Switzerland, Australia, Japan and the EU. For more info reference page 18 of the [UC Travel policy](#).

Remember to book an economy class seat and register for insurance if you are not using Connexus.



BEWARE

Many airlines are imposing hidden fees that are **unallowable** expenses. Connexus ticket prices don't have added fees, just sayin'. '_(Ü)_/'

Don't fall victim to the most common unallowable expenses: preferred seating and advanced seat selection.



Meals

The new maximum daily meal expense has **reduced** to \$62/day, effective 10/15/17.

Remember to save your **itemized** receipts! For reimbursement we collect all meal receipts with purchased items listed.



Keep in mind you will **not** be reimbursed extra meals if your conference registration indicates that all meals are included. Lastly, alcohol is never reimbursable. Never ever.

Rental Cars



Rental car [agencies](#) give discounted rates to UC travelers! If you are traveling domestic be sure to:

- book your rental through **Connexus**
- book an **intermediate** size rental or smaller
- **decline** supplemental insurance
- **print the UC CDP#** on the rental contract

Doing all this ensures that the rental agency is completely responsible for the car if an accident should occur. However, on foreign travel ICB recommends supplemental insurance **and** printing the UC CDP#. For more details read [this](#).

Don't forget to provide a **rental contract** for reimbursement!

Lodging

The new maximum lodging rate per night is \$275 effective 10/15/17. This rate excludes taxes and fees. Please contact the ICB if you need an exception.

Regardless of price, traveler must provide a **folio** from the place of lodging for reimbursement.

See example →



GUEST RECEIPT

Hotel Company Name
123 Main Street
Townsville, Ontario
M1M 1M1 CANADA
Tel: 555-555-5555
Fax: 555-555-5556

Check-in Date: mddy Check-out Date: mddy
Checked in by: [Clerk ID] Checked out by: [Clerk ID]
Room Rate: \$100.00/night CDN

GUEST CHARGES		
Date	Description	Charge
mddy	Room Charge	\$100.00
mddy	Tax	\$ 10.00
mddy	Phone Long Distance	\$ 10.00
mddy	Tax	\$ 1.00
TOTAL		\$121.00 CDN

Payment information

Card Number *****7975 Card Type MC
Trans Date & Time mddy mmhh Trans Type Purchase
Total \$121.00 CDN

Authorization Number #####
Reference Number 6600013500100100 S

01 APPROVED - THANK YOU 027

Cardholder Signature _____
Cardholder will pay card issuer above amount pursuant to Cardholder Agreement.

No Online Bundling

Don't do it! Do not use online booking sites to bundle your rental and lodging expenses.

Why? The booking site and the individual agencies will not be able to provide a folio/rental contract. This would prevent you from being reimbursed for those expenses because ICB **requires** these items.



Group Trips

To make group reimbursements as easy as possible, assign one person as your group's leader. This person **must** book/charge all shared resources (ex: lodging & rental cars) and provide a list of all travelers. Some unallowable expenses such as rental cars above intermediate size are acceptable with **justification**.

Other members of the group can still claim individual expenses (ex: meals and registration). Travelers must indicate if they are part of a group on their reimbursement packets.



Ready to Go!

Reminder: ICB and BFS require a total of 20 business days for processing advance and reimbursement requests.

For questions about exceptions or special circumstances please email the ICB travel coordinator. For more info visit the ICB [website](#) or the UCOP travel [website](#).

Safe travels!

