

Department of Family Medicine

Travel and Entertainment Reimbursement Requests

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Purchaser

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ENTERTAINMENT

“Entertainment” = payment for food/refreshments for others

- Must be a **necessary** and **integral part of a business meeting** (rather than a matter of personal convenience)
- The purpose or nature of the event must be clearly stated
- A guest list containing the names, titles, and affiliations must be provided to establish the business relationship to the University of the participants being entertained

Examples:

- Hosting a meeting or conference
- When the University is host to official guests (non-employees) or prospective appointees for positions requiring specialized training or experience of a professional, technical or administrative nature
- When meetings of an administrative nature are held which are directly concerned with the welfare of the University
- When meetings between faculty or administrators and students are held

TRAVEL

In order to be reimbursable, travel must be for a legitimate **business purpose**. This may include activities that contribute to any one of the University's major functions of teaching, research, patient care, or public service, or to any other substantial and bona fide University business activity.

University employees traveling on official business shall observe normally accepted **standards of propriety** in the type and manner of expenses they incur. In addition, it is the traveler's responsibility to report their actual travel expenses in a responsible and ethical manner.

<https://policy.ucop.edu/doc/3420365/BFB-G-28>

Travel Reimbursement Methods

- Self-service system (Travel Express/Concur)
 - Requires training
 - Traveler must download app and upload receipts into system
 - Traveler responsible for submitting accurate, comprehensive, and compliant report
 - <https://www.finance.ucla.edu/express/general-user> for training
- Complete Travel/Entertainment Reimbursement Request Form
 - Review this presentation for training
 - Save receipts and submit to Fund Manager with [Reimbursement Request Form](#)
 - Fund Manager and Purchaser will review for accuracy/compliance
 - Guests must use this option

Note: PTA is recommended for either option for purchase of airfare

Purchasing Airfare with PTA

PTA = Pre-Trip Authorization

- Best option, **preferred method**, no out-of-pocket expense
- Flight arranged via UCLA (ensures compliance, low fares, easy to track)

STEP 1 – CREATE ITINERARY:

- Contact Travel at 800-235-8252/310-206-2639 or travel@finance.ucla.edu
- Or create your own using [UC Travel Center online booking tool](#)

STEP 2 – EMAIL FUND MANAGER/PURCHASER TO REQUEST PTA:

- Forward itinerary (with traveler name, dates, destination, and cost) and provide business justification and FAU
- Guest travelers: you will need to gather more info, visit [website](#) for details

STEP 3 – COMMUNICATE PTA TO UC TRAVEL:

- Purchaser will provide you and the travel agent with the PTA. (If you booked it yourself, enter the PTA online)

STEP 4 – FINALIZE

- Once PTA is received, UC Travel will email boarding pass



Purchasing Airfare Directly (without PTA)

- Strongly discouraged
- If you proceed, you must abide by the following:
 - Be familiar with and in compliance with all travel policies
 - UC: <https://www.ucop.edu/central-travel-management/resources/index.html>
 - UCLA: <https://travel.ucla.edu/policies>
 - Sponsor policies
 - Obtain and submit original receipt for airfare
 - Must include form of payment
 - Must be itemized
 - Don't use Expedia, Travelocity, Orbitz, etc. (they do not provide itemized receipts)
 - Must be economy/coach (otherwise, need physician letter and letter from CAO)
 - Cannot be reimbursed until travel has taken place

Travel/Entertainment Reimbursement Request Form

Download latest version of form on
our [website](#)

Only use this form for Travel and
Entertainment

Blue = Travel

Green = Entertainment

Rarely you may need to request
both on same form

UCLA Family Medicine Department Travel/Entertainment Reimbursement Request Form			
rev 1/9/2023			
Preparer Name and Email:			
Date Prepared			
Payee/Traveler Name	For Guests: select method of payment <input type="checkbox"/> Check <input type="checkbox"/> Zelle	If Zelle is selected, is account linked to: <input type="checkbox"/> Phone <input type="checkbox"/> E-mail	
Address	Phone Number	E-mail	
Travel Location	Travel Dates	Foreign Travel <input type="checkbox"/> Yes <input type="checkbox"/> No	FAU (acct-cc-fund)
Business Purposes:			
Travel Expenses			Amount (\$)
Airfare (If pre-paid, list PTA here and attach copy):			\$0.00
Lodging # of nights:			\$0.00
Ground Transportation	<input type="checkbox"/> Taxi/Lyft/Uber <input type="checkbox"/> Limo <input type="checkbox"/> Car Rental <input type="checkbox"/> Other	\$0.00	
Mileage (click here for rates)	<input type="checkbox"/> Personal Car (attach map) # of miles:	\$0.00	
Meals & Incidentals	<input type="checkbox"/> Actual (incl itemized receipts) <input type="checkbox"/> Per Diem (foreign only)	\$0.00	
Tolls & Parking			\$0.00
Conference Registration Fees			\$0.00
Baggage Fees			\$0.00
Other (e.g. phone, internet, visa, etc) Type of Expense:			\$0.00
Other (e.g. phone, internet, visa, etc) Type of Expense:			\$0.00
Total Travel Expenses			\$0.00
Entertainment Expenses (<11 guests: list names/titles in comments; >= 11: attach guest list)			Amount (\$)
Entertainment - Breakfast # of guests:			\$0.00
Entertainment - Lunch # of guests:			\$0.00
Entertainment - Dinner # of guests:			\$0.00
Entertainment - Refreshments # of guests:			\$0.00
Alcohol or Spouses/Other Guests <input type="checkbox"/> Yes <input type="checkbox"/> No			\$0.00
Other Misc. Expenses Type:			\$0.00
Total Entertainment Expenses			\$0.00
Total Expenses			\$0.00
Comments:			
Payee Signature _____ Date _____			
PI Signature (if not the Payee) _____ Date _____			
Fund Manager _____ Approved Date _____			

Things to consider

Organize your reimbursement cleanly and clearly

- **SAVE ALL RECEIPTS!**
- Tape receipts to a regular-sized sheet of paper so that they lay flat and can be easily scanned
- Organize receipts by either type or by day
- Include notes to clarify
- If receipt is missing, include a note in the receipt section

Check for Accuracy

- Be sure the amount you are requesting matches the receipts provided

NOTE: if you prefer to upload receipts directly into Concur, reach out to Purchaser prior to travel to download app and receive training)

**UCLA Family Medicine Department
Travel/Entertainment Reimbursement Request Form**

Rev. 1/9/2023

Preparer Name and Email:	
Date Prepared	

Payee/Traveler Name	For Guests: select method of payment <input type="checkbox"/> Check <input type="checkbox"/> Zelle	If Zelle is selected, is account linked to: <input type="checkbox"/> Phone <input type="checkbox"/> E-mail	
Address	Phone Number	E-mail	
Travel Location	Travel Dates	Foreign Travel <input type="checkbox"/> Yes <input type="checkbox"/> No	FAU (acct-cc-fund)
Business Purpose:			

Travel Expenses		Amount (\$)
Airfare	(If pre-paid, list PTA here and attach copy):	\$0.00
Lodging	# of nights:	\$0.00
Ground Transportation	<input type="checkbox"/> Taxi/Lyft/Uber <input type="checkbox"/> Limo <input type="checkbox"/> Car Rental <input type="checkbox"/> Other	\$0.00
Mileage (click here for rates)	<input type="checkbox"/> Personal Car (attach map) # of miles:	\$0.00
Meals & Incidentals	<input type="checkbox"/> Actual (incl itemized receipts) <input type="checkbox"/> Per Diem (foreign only)	\$0.00
Tolls & Parking		\$0.00
Conference Registration Fees		\$0.00
Baggage Fees		\$0.00
Other (e.g. phone, internet, visa, etc)	Type of Expense:	\$0.00
Other (e.g. phone, internet, visa, etc)	Type of Expense:	\$0.00
Total Travel Expenses		\$0.00

Entertainment Expenses (<11 guests: list names/titles in comments; >= 11: attach guest list)		Amount (\$)
Entertainment - Breakfast	# of guests:	\$0.00
Entertainment - Lunch	# of guests:	\$0.00
Entertainment - Dinner	# of guests:	\$0.00
Entertainment - Refreshments	# of guests:	\$0.00
Alcohol or Spouses/Other Guests	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$0.00
Other Misc. Expenses	Type:	\$0.00
Total Entertainment Expenses		\$0.00

Total Expenses	\$0.00
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Comments:	
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Payee Signature	Date
PI Signature (if not the Payee)	Date
Fund Manager	Approved Date

**UCLA Family Medicine Department
Travel/Entertainment Reimbursement Request Form**

rev 1/9/2023

Preparer Name and Email:		
Date Prepared		

Payee/Traveler Name	For Guests: select method of payment <input type="checkbox"/> Check <input type="checkbox"/> Zelle	If Zelle is selected, is account linked to: <input type="checkbox"/> Phone <input type="checkbox"/> E-mail	
Address	Phone Number	E-mail	
Travel Location	Travel Dates	Foreign Travel	FAU (acct-cc-fund)
		<input type="checkbox"/> Yes <input type="checkbox"/> No	


- 1st box: Preparer information (person completing the form)
- 2nd box: Payee information (person receiving reimbursement)
 - Non-employee travelers: select reimbursement payment type; if Zelle: be sure to include phone # and/or email of the linked account
- FAU information: **IMPORTANT!**
 - Account #, cost center, fund #
 - Discuss with PI and fund manager to be sure this is correct
 - Must be an allowable cost (on the budget)
 - Must be enough funds remaining to cover the cost
 - Must be within the allowable time period (after start date, before end date)

UCLA Family Medicine Department
Travel/Entertainment Reimbursement Request Form

rev 1/9/2023

Preparer Name and Email:		
Date Prepared		

Payee/Traveler Name	For Guests: select method of payment <input type="checkbox"/> Check <input type="checkbox"/> Zelle	If Zelle is selected, is account linked to: <input type="checkbox"/> Phone <input type="checkbox"/> E-mail	
Address	Phone Number	E-mail	
Travel Location	Travel Dates	Foreign Travel <input type="checkbox"/> Yes <input type="checkbox"/> No	FAU (acct-cc-fund)
Business Purpose:			



Business Purpose/Justification

- Incredibly important
- Be specific
- No abbreviations
- Example:
 - ~~“To attend HPTN conference in DC”~~ **WRONG!**
 - “For the Principal Investigator to present research data at the 2016 Annual HIV Prevention Trials Network conference in Washington, DC” **GOOD!**

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Travel/Entertainment Reimbursement Request Form**

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Preparer Name and Email:	
Date Prepared	

Payee/Traveler Name	For Guests: select method of payment <input type="checkbox"/> Check <input type="checkbox"/> Zelle	If Zelle is selected, is account linked to: <input type="checkbox"/> Phone <input type="checkbox"/> E-mail	
Address	Phone Number	E-mail	
Travel Location	Travel Dates	Foreign Travel <input type="checkbox"/> Yes <input type="checkbox"/> No	FAU (acct-cc-fund)
Business Purpose:			

Travel Expenses		Amount (\$)
Airfare	(If pre-paid, list PTA here and attach copy):	\$0.00
Lodging	# of nights:	\$0.00
Ground Transportation	<input type="checkbox"/> Taxi/Lyft/Uber <input type="checkbox"/> Limo <input type="checkbox"/> Car Rental <input type="checkbox"/> Other	\$0.00
Mileage (click here for rates)	<input type="checkbox"/> Personal Car (attach map) # of miles:	\$0.00
Meals & Incidentals	<input type="checkbox"/> Actual (incl itemized receipts) <input type="checkbox"/> Per Diem (foreign only)	\$0.00
Tolls & Parking		\$0.00
Conference Registration Fees		\$0.00
Baggage Fees		\$0.00
Other (e.g. phone, internet, visa, etc)	Type of Expense:	\$0.00
Other (e.g. phone, internet, visa, etc)	Type of Expense:	\$0.00
Total Travel Expenses		\$0.00

Entertainment Expenses (<11 guests: list names/titles in comments; >= 11: attach guest list)		Amount (\$)
Entertainment - Breakfast	# of guests:	\$0.00
Entertainment - Lunch	# of guests:	\$0.00
Entertainment - Dinner	# of guests:	\$0.00
Entertainment - Refreshments	# of guests:	\$0.00
Alcohol or Spouses/Other Guests	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$0.00
Other Misc. Expenses	Type:	\$0.00
Total Entertainment Expenses		\$0.00

Total Expenses	\$0.00
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Comments:	
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Payee Signature	Date
PI Signature (if not the Payee)	Date
Fund Manager	Approved Date

Travel Expenses			Amount (\$)
Airfare	(If pre-paid, list PTA here and attach copy):		\$0.00
Lodging	# of nights:		\$0.00

- Input PTA # (if no PTA, be sure to include original, itemized receipt)
- Lodging must include itemized receipt
 - Receipt must show room rate and taxes
 - Separate other charges and list in the appropriate section

Should be subtracted from
Lodging total and listed
under Meals instead

Should be subtracted from
Lodging total and marked as
“Personal: do not reimburse”

Hotel ABC

515 Main Street
Washington, DC 01234
Tel: 555-555-5555
Fax: 123-456-7890
www.example.com

Date 9/4/16			
Room Number	534	Invoice Number	4321
Guest Name:	Josephine Bruin		
Address Line 1:	10880 Wilshire Blvd.		
Address Line 2:	Suite 1800		
City, State ZIP	Los Angeles, CA 90024		
Tel:	1-888-123-4567		
Fax:	1-888-111-2222		
Description		Date	Amount
Room Rental		9/1/16	\$130.00
Room Tax		9/1/16	\$5.00
Room Rental		9/2/16	\$130.00
Room Tax		9/2/16	\$5.00
Room Service – Lunch Special		9/2/16	\$22.00
Room Rental		9/3/16	\$130.00
Room Tax		9/3/16	\$5.00
In-Room Movie Rental		9/3/16	\$7.50
Total			\$444.50

PAID
Visa Credit Card *****4321
Name on Card: Josephine A. Bruin
Paid Date: 9/4/16
Confirmation #: 1234567

Travel Expenses		Amount (\$)
Airfare	(If pre-paid, list PTA here and attach copy):	\$0.00
Lodging	# of nights:	\$0.00
Ground Transportation	<input type="checkbox"/> Taxi/Lyft/Uber <input type="checkbox"/> Limo <input type="checkbox"/> Car Rental <input type="checkbox"/> Other	\$0.00
Mileage (click here for rates)	<input type="checkbox"/> Personal Car (attach map) # of miles:	\$0.00
Meals & Incidentals	<input type="checkbox"/> Actual (incl itemized receipts) <input type="checkbox"/> Per Diem (foreign only)	\$0.00
Tolls & Parking		\$0.00
Conference Registration Fees		\$0.00
Baggage Fees		\$0.00
Other (e.g. phone, internet, visa, etc)	Type of Expense:	\$0.00
Other (e.g. phone, internet, visa, etc)	Type of Expense:	\$0.00
Total Travel Expenses		\$0.00

• Ground Transportation

- Include reason (e.g. “from home to airport”)
- If over \$75: receipt and explanation **required**
- Car rental receipts must be original and itemized


• Meals & Incidentals


- Best practices require receipts as reimbursements are based on actual expenses.
- Cannot exceed the [maximums allowable](#). **Please note maximum meal rate is not a per diem.**
- Only exception is for **foreign travel**, where daily per diem for food is allowable. Visit [US Dept of State website](#) for latest rates based on location of travel.
- If meal receipts are lost/unavailable, traveler may provide best estimate
- Meal reimbursement eligibility requires overnight stay

Meal Receipts Example

MEALS

Breakfast on 11/12/22

RECEIPT	
Jan's Cafe #123 5678 Central Ave. Washington, DC 001234 Tel# 555-123-4567	
KS# 42	11/13/22 7:44 AM
Tofu Omelet	9.00
Coffee	2.00
Souvenir Mug	18.00
Subtotal	29.00
Tax	2.83
Total	31.83
Tip	<u>\$6</u>
Total	<u>\$37.83</u>
PAID CC: *****4321  Signature	

RECEIPT	
Joe's Restaurant #3475 1234 Main Street Washington, DC 001234 Tel# 555-867-5309	
KS# 3	11/12/22 8:07 AM
Breakfast Special	14.00
Orange Juice	4.00
Subtotal	18.00
Tax	1.75
Total	19.75
Tip	<u>\$3</u>
Total	<u>\$22.75</u>
PAID CC: *****4321  Signature	
GUEST COPY	

Breakfast on 11/13/22

Mug was personal expense, do not reimburse. Only requesting \$18 total for breakfast on 11/13

Lunch and dinner on 11/12 and 11/13 were provided by the conference; so no reimbursement is requested.

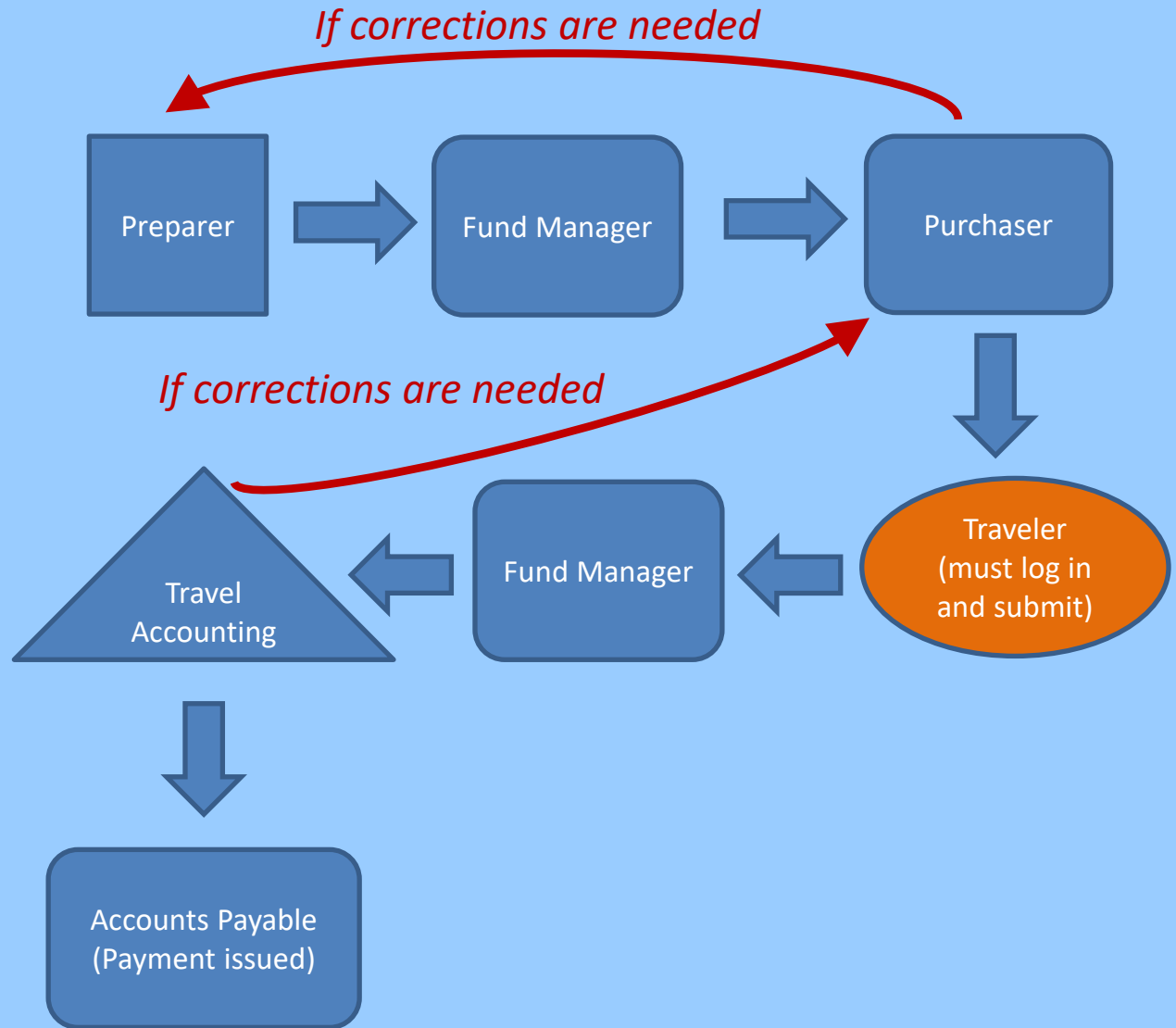
Total Meals: \$40.75

Travel Expenses		Amount (\$)
Airfare	(If pre-paid, list PTA here and attach copy):	\$0.00
Lodging	# of nights:	\$0.00
Ground Transportation	<input type="checkbox"/> Taxi/Lyft/Uber <input type="checkbox"/> Limo <input type="checkbox"/> Car Rental <input type="checkbox"/> Other	\$0.00
Mileage (click here for rates)	<input type="checkbox"/> Personal Car (attach map) # of miles:	\$0.00
Meals & Incidentals	<input type="checkbox"/> Actual (incl itemized receipts) <input type="checkbox"/> Per Diem (foreign only)	\$0.00
Tolls & Parking		\$0.00
Conference Registration Fees		\$0.00
Baggage Fees		\$0.00
Other (e.g. phone, internet, visa, etc)	Type of Expense:	\$0.00
Other (e.g. phone, internet, visa, etc)	Type of Expense:	\$0.00
Total Travel Expenses		\$0.00

- Registration can be paid in advance
- If not, you must provide:
 - Receipt
 - Copy of bank/credit card statement
 - Copy of the meeting agenda
 - Note: Cannot be reimbursed until after meeting has taken place (so expense may be sitting on your credit card for months)

Travel Reimbursement Workflow

- Preparer – person completing the reimbursement form (could be the traveler or employee acting on behalf of traveler).
- Preparer must obtain PI approval before submitting to Fund Manager
- Purchaser will input into Concur, but only the Traveler has the ability to submit
- Traveler **MUST** submit themselves; neither the Purchaser nor the Preparer can do it on their behalf



Things to consider

Submit in a timely manner

- You should prepare your reimbursement immediately upon return
- Submit within 20 days of travel
- Once Purchaser has completed reimbursement in Concur, **you must log in and submit it**
- If request is not successfully approved by Travel Accounting within 45 days, you will need to provide memo and justification for why it is late
- Late reimbursements may appear as income on W2

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Address	Phone Number	E-mail	
Travel Location	Travel Dates	Foreign Travel <input type="checkbox"/> Yes <input type="checkbox"/> No	FAU (acct-cc-fund)
Business Purpose:			

Travel Expenses	Amount (\$)
Airfare (If pre-paid, list PTA here and attach copy):	\$0.00
Lodging # of nights:	\$0.00
Ground Transportation <input type="checkbox"/> Taxi/Lyft/Uber <input type="checkbox"/> Limo <input type="checkbox"/> Car Rental <input type="checkbox"/> Other	\$0.00
Mileage (click here for rates) <input type="checkbox"/> Personal Car (attach map) # of miles:	\$0.00
Meals & Incidentals <input type="checkbox"/> Actual (incl itemized receipts) <input type="checkbox"/> Per Diem (foreign only)	\$0.00
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Baggage Fees	\$0.00
Other (e.g. phone, internet, visa, etc) Type of Expense:	\$0.00
Other (e.g. phone, internet, visa, etc) Type of Expense:	\$0.00
Total Travel Expenses	\$0.00

Entertainment Expenses (<11 guests: list names/titles in comments; >= 11: attach guest list)	Amount (\$)
Entertainment - Breakfast # of guests:	\$0.00
Entertainment - Lunch # of guests:	\$0.00
Entertainment - Dinner # of guests:	\$0.00
Entertainment - Refreshments # of guests:	\$0.00
Alcohol or Spouses/Other Guests <input type="checkbox"/> Yes <input type="checkbox"/> No	\$0.00
Other Misc. Expenses Type:	\$0.00
Total Entertainment Expenses	\$0.00

Total Expenses	\$0.00
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Comments:	
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Payee Signature	Date
PI Signature (if not the Payee)	Date
Fund Manager	Approved Date

ENTERTAINMENT

It is preferred that we pay catering expenses directly to vendor in advance, rather than as a reimbursement. To do so:

- Obtain a quote from vendor
- Review for compliance with maximums
- Submit [Purchase Request Form](#) to Fund Manager including:
 - Estimated number of attendees and breakdown of per person costs
 - Business justification
 - FAU information
- After Fund Manager approves, Purchaser will work with UCLA Purchasing to create a PO# and will communicate that to the vendor
- After the event takes place, the final invoice and guest list needs to be submitted to Purchaser

ENTERTAINMENT

IF SEEKING REIMBURSEMENT AFTER THE FACT:

- If 10 or less guests, use Comments section to list:
 - Full names
 - Titles
 - Affiliations/institutions
- If 11 or more attendees, you can attach a list (create the sign-in sheet before the event so that attendees can sign)
- Maximums:
 - <https://travel.ucla.edu/policy-resources/reimbursement-allowances-mileage-meals>
 - Maximum includes labor, tax, delivery, set-up, service fees, tips, etc.
- Justification must include type of event and # of participants

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Address	Phone Number	E-mail	
Travel Location	Travel Dates	Foreign Travel <input type="checkbox"/> Yes <input type="checkbox"/> No	FAU (acct-cc-fund)
Business Purpose:			

Travel Expenses	Amount (\$)
Airfare (If pre-paid, list PTA here and attach copy):	\$0.00
Lodging # of nights:	\$0.00
Ground Transportation <input type="checkbox"/> Taxi/Lyft/Uber <input type="checkbox"/> Limo <input type="checkbox"/> Car Rental <input type="checkbox"/> Other	\$0.00
Mileage (click here for rates) <input type="checkbox"/> Personal Car (attach map) # of miles:	\$0.00
Meals & Incidentals <input type="checkbox"/> Actual (incl itemized receipts) <input type="checkbox"/> Per Diem (foreign only)	\$0.00
Tolls & Parking	\$0.00
Conference Registration Fees	\$0.00
Baggage Fees	\$0.00
Other (e.g. phone, internet, visa, etc) Type of Expense:	\$0.00
Other (e.g. phone, internet, visa, etc) Type of Expense:	\$0.00
Total Travel Expenses	\$0.00

Entertainment Expenses (<11 guests: list names/titles in comments; >= 11: attach guest list)	Amount (\$)
Entertainment - Breakfast # of guests:	\$0.00
Entertainment - Lunch # of guests:	\$0.00
Entertainment - Dinner # of guests:	\$0.00
Entertainment - Refreshments # of guests:	\$0.00
Alcohol or Spouses/Other Guests <input type="checkbox"/> Yes <input type="checkbox"/> No	\$0.00
Other Misc. Expenses Type:	\$0.00
Total Entertainment Expenses	\$0.00

Total Expenses	\$0.00
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Comments:	
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Payee Signature	Date
PI Signature (if not the Payee)	Date
Fund Manager	Approved Date

- Total expenses will calculate automatically
- Use comment section to explain anything that is unusual
 - Help us understand the expenses and information provided
 - The more detail the better
- Must be signed by the payee/person who will receive the reimbursement (not the preparer)
- Need PI signature if the Payee is not the PI
- Submit to Fund Manager

		Total Expenses	\$0.00
Comments:			
Payee Signature		Date	
PI Signature (if not the Payee)		Date	
Fund Manager		Approved Date	

The Fine Print

Reimbursements for travel and entertainment expenses must comply with receipt and documentation requirements specified in the UC Business and Finance Bulletin, G-28, Policy and Regulations Governing Travel or UC Business and Finance Bulletin BUS-79, Expenditures for Entertainment, Business Meetings and Other Occasions. Visit <https://travel.ucla.edu/policies> to review all UC travel policies.

You must also comply with sponsor guidelines!

As a Reminder...

- The more information, the better
- Organize!
- Include receipts for EVERYTHING to be on the safe side
- Ask questions *before* travelling and before submission
- Double-check your work
- Convert currency yourself to manage expectations
- Submit on time
- Review/approve on time
- We're here to help you