

Center for Adaptive Optics

TRAVEL REIMBURSEMENT INSTRUCTIONS

Please submit forms and **ORIGINAL** receipts to:
Center for Adaptive Optics, ATTN: Karen Peña
UC Santa Cruz, 1156 High Street, Santa Cruz, CA 95064

If you have any questions, please contact:
Karen Peña at kjpena@ucolick.org or 831-459-5711

A POST TRAVEL FORM IS REQUIRED FOR ANYONE WHO WISHES TO BE REIMBURSED FOR TRAVEL EXPENSES:

- If you have not previously been reimbursed by UC Santa Cruz, or have changed your mailing address, you will need to fill out a **Payee Setup Form 204**. This form allows the accounting system to cut you a check, so if you are not sure that we have a current Form 204 for you, fill out and submit another one.
- Be sure to SIGN your post travel form before you submit it.

TRAVELER INFORMATION SECTION:

Fill in your name, email, mailing address, phone number, travel destination, purpose of travel, and departure and return dates/times. **(Note: The mailing address must match the address on the Form 204 – this is the address to which your reimbursement check will be mailed.)**

TRAVELERS STATUS SECTION:

- US Citizen: Please Mark Yes or No
- Foreign: Visa Type – please fill in Visa type and see below for additional requirements:
 - **Resident Aliens (holders of Green Cards):** You must attach a copy of your Green Card.
 - **Foreign Visitors (holders of B-1, B-2, WB, WT, J-1, F-1 and H1B Visas):**
 - A copy of the foreign visitor's I-94 record and the signature page of your passport are required.
 - A Certification Of Academic Activity form is required for B-1, B-2, WB and WT visas.
- Are you a UC Student or Employee? Be sure to note this before you turn in your forms.

DESCRIPTION OF EXPENSE SECTION:

Insert expenditure amounts and the dates they were incurred. Include all expenditures associated with the travel, even if the University paid the expense on your behalf – these expenses will automatically be deducted from the bottom-line total. ****BE SURE TO CONVERT FOREIGN DOLLARS TO U.S. DOLLARS****

- Roundtrip airfare can be entered in full on the date of departure.
- Include an explanation under Comments to further detail each expenditure.
- Personal car mileage should be entered in miles driven in the gray row. The program will automatically calculate the rate. Do not enter a value in the row immediately below the mileage row. Note: this rate includes the cost of gasoline. When a personal vehicle is used in lieu of air travel to the same destination, the lesser of the following costs will be reimbursed:
 - Airfare plus transportation costs to and from the airport or,
 - Automobile mileage cost plus cost of meals, lodging and parking while in transit.
- Meals and Incidentals (M&IE) are actual expenses, up to the allowance listed. The daily allowance is a maximum allowance, and is not an entitlement. Meals for travel less than 24 hours are only reimbursed if the trip included an overnight stay as supported by a lodging receipt. ****Please use the Foreign Per Diem lines if you traveled outside the United States; different reimbursement rates apply.****

**** ALCOHOL is NOT reimbursable on a post travel form. If you submit a receipt with alcohol charges, the amount spent on alcohol will be subtracted from the total and you will only be reimbursed you for the meal. ****

PAYMENTS MADE (IN ADVANCE) TO/OR ON BEHALF OF TRAVELER SECTION:

- **UCSC Students and Employees:** Travel Advance Request paperwork must be filled out BEFORE you travel. Costs such as Airfare, Registration Fees & Lodging can be paid in advance of the trip and will need to be accounted for in this section of your post travel form. Please contact CfAO or LOBO for details; supervisor signatures are required.
- **For Non-UCSC Travelers:** Indicate any and all expenses made by your institution on your behalf. Prior approval by CfAO or LOBO is REQUIRED! If your institution wants to make certain payments for you in advance, please contact CfAO, for more information. Expenses paid by your institution are NOT reimbursable directly to you.

RECEIPTS

**** NO TRAVEL PACKAGE DEALS (AIRFARE+LODGING+RENTAL CAR) WILL BE ACCEPTED ****

It is the traveler's responsibility to properly account for all travel by obtaining and submitting **original** receipts. ****Photocopies of receipts are not acceptable.****

- A conference or meeting agenda must be attached to the Post Travel Expense form to substantiate the business purpose of the trip.

Original itemized receipts are REQUIRED for:

- **Airfare Costs:** e-tickets and e-receipts ARE an acceptable form of receipt. e-itineraries or other form of itineraries from the airline are NOT ACCEPTABLE. The receipt must show proof of payment. Also, ****you must fly with a US Carrier**.**
- **Lodging:** a detailed folio is required for reimbursement! You must show detailed descriptions of ALL room charges.
- **Registration Fees** for conferences, conventions or meetings. If paid in advance by your institution or company, be sure to include that expense in the "Payments Made To/Or On Behalf of Traveler" section of the Post Travel Form.
- **Misc. Expenses** greater than \$75 (phone calls, parking fees, shuttle costs, taxi, etc.)
- **Host Gift** greater than \$25
- ***Rental Car** (see below for further details).

*****ASK FOR A RECEIPT FOR EVERYTHING YOU DO OR SPEND*****

*** Car Rental Instructions for University of California academics and staff:**

The University of California will not reimburse for added car insurance when you rent a car, so if you don't personally have insurance that covers car rentals, the University has negotiated car rental agreements with several car rental companies that include insurance. University agreements cover any damage sustained by the rental vehicle and provide increased liability coverage. In order to be covered you must identify yourself as a University employee and provide the applicable UC ID#.

*** Car Rental Instructions for Non-University of California employees:**

Check with your institution for their rental car rates and policies. Use your institution's rental car agreements if possible to ensure the best rates and coverage. If your institution does not have a car rental agreement, and you do not have personal insurance that covers car rentals, non-UC employees should accept Liability (LDW) and Collision (CDW) Damage Waiver insurance ONLY when renting a vehicle. Please note that car rental companies will offer you many different types of insurance, which you should decline. We can only reimburse for Liability and Collision insurance.

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