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[Appendix I: Procedures](#)

Note: For links to referenced documents

see Section VI, *Related Information* below.

I. POLICY SUMMARY

- A.** This section of the Policy and Procedure Manual (PPM) for the University of California (UC) Agriculture and Natural Resources (UC ANR) describes how UC policy on travel (Business and Finance Bulletin No. G-28, *Travel Regulations*) is implemented in the UC ANR environment.
- B.** The information presented here is general and cannot address all of the unique concerns that can arise regarding travel. Before the employee incurs travel expenses, they should direct questions regarding specific situations to the Business Operations Center contact noted on page 1 above.
- C.** This section of the PPM applies to all UC ANR employees, both academic appointees and staff.
- D.** This section of the PPM does not apply to Agriculture Experiment Station (AES) Specialists and/or any other academics affiliated with a UC campus. Academics that are affiliated with a campus should consult their departmental administration for information regarding travel.

II. DEFINITIONS

See also UC Business and Finance Bulletin No. G-28, *Travel Regulations*.

In the context of this section of the PPM, the below terms are defined as follows.

- A. Supervisor:** Someone with all of the following three characteristics:
 - 1. They are a UC Cooperative Extension (UCCE) Director, a Research and Extension Center (REC) Director, a Statewide Program and/or Institute Director, or other authorized responsible UC ANR administrator;
 - 2. They are qualified to judge if the proposed travel is ordinary, reasonable, and necessary to the assigned responsibilities of the traveler; and
 - 3. They are authorized to make commitments for the fund source that would support the proposed travel.
- B. Travel:** All travel related to official UC ANR business that is conducted on official time (e.g., regular working days), even if no expense will accrue to UC.

III. POLICY TEXT

- A.** UC ANR will comply with all UC policies regarding travel, e.g., Business and Finance Bulletin No. G-28, *Travel Regulations* (BFB G-28). Procedures to do so are described below and in the related appendices.
- B.** All official travel will be properly authorized, reported, and reimbursed in accordance with UC travel policy.
- C.** *Before traveling*, employees will seek and obtain their supervisor's advance approval to do so. They will be especially attentive to this requirement if approval to travel out-

of-state is requested. Supervisor approval is required for all travel conducted on official time (e.g., regular working days) even if no expense will accrue to UC.

- D. Employees will make travel plans that minimize UC costs, always using:
 - 1. The most economical mode of travel, and
 - 2. The most usually traveled route consistent with the authorized purpose of the trip.
- E. To the greatest extent practicable employees will book all travel arrangements through ConnexUC (a.k.a. “Connexus”). ConnexUC can be accessed through the AggieTravel portal. (Note: Oakland-based employees should access Connexus via the link provided in item VI, *Related Information*, below.)
- F. Employees will report all travel expenses in an accurate and ethical manner. Under no circumstances will employees charge personal travel expenses to UC, whether on a temporary or permanent basis.
- G. Employees will claim only the actual and reasonable expenses that they incur each individual day of their trip and will not claim the daily maximum per diem amount unless they have actually expended that amount. They will not treat the daily meals and incidental expenses (M&IE) cap as a per diem, nor will they average their costs over multiple days.
- H. Employees traveling under the sponsorship of a non-University entity will not charge sponsored travel expenses to a UC account; travel advances, tickets, and reimbursement will be obtained from the sponsor.

IV. COMPLIANCE / RESPONSIBILITIES

A. APPROVAL OF TRAVEL PLANS

- 1. Supervisors have the authority to approve appropriate travel proposals, and the responsibility to decline to approve those that are inappropriate.
- 2. Criteria for All Travel

Supervisors will approve proposed travel plans only if they meet **all of the following criteria**:

- a. The proposed travel is ordinary, reasonable, and necessary to the assigned responsibilities of the employee. (Or, for travel by a non-employee, the travel is necessary to UC ANR’s programmatic and/or administrative operation.)
- b. The proposed travel will be supported by an appropriate fund source.
 - i. In the context of this section of the PPM, “appropriate” fund sources have all of the following three characteristics:
 - The employee (and/or the employee’s supervisor) has authority over the subject fund source;
 - There is no restriction on the fund source prohibiting its use for the purpose of travel; and

- The balance of the fund source is sufficient to fully support the entire cost of the proposed travel.
3. Additional Criteria for Travel Out-of-State and/or International
In addition to applying the above criteria, supervisors will approve proposed out-of-state travel plans only if they also meet at least one of the following conditions:
 - a. The programmatic requirements of the project call for out-of-state travel; or
 - b. It is in UC ANR's best interest to attend an out-of-state event and/or engage in an out-of-state activity; or
 - c. The trip will not use state funds to support a trip to a state to which travel has been restricted by California law.
 4. Approval of Alternative Travel Mode and/or Route
 - a. It is UC ANR's practice that travel be conducted so as to minimize UC costs, using the most economical mode of transportation and the most usually traveled route consistent with the authorized purpose of the trip.
 - b. If an employee wishes to deviate from the most economical mode of transportation (for example, to travel by car in lieu of flying) and/or the most commonly traveled route, they must request and receive advance approval from their supervisor and an administrative official with redelegated authority to approve "exceptional" travel (see below item IV.C. for a list of positions with this authority).
 - c. If an alternative transportation mode and/or route is approved, the employee will be reimbursed only for the value of the trip if it had been made using the most economical travel mode and/or route. For example, if travel by car in lieu of flying is approved, reimbursement will be made at the lowest available air fare plus the cost of terminal transportation. As well, the allowance for subsistence expenses shall be limited to the mileage and incidental expenses (M&IE) per-day rate that would have been allowed had the trip been made by the most economical travel mode and/or route.
 5. Exceptional reimbursement of any expense not allowed by UC ANR policy and practice must be specifically requested and approved by the supervisor and an administrative official with redelegated authority to approve "exceptional" travel (see below item V.C. for a list of positions with this authority).

B. APPROVAL OF TRAVEL REIMBURSEMENT

The UC ANR Vice President has vested the following positions with authority to approve travel reimbursement of any dollar amount, excluding those that require approval of an exception to BFB G-28.

1. Associate Vice President
2. Associate Vice President Business Operations

3. Vice Provost of Research and Extension
4. Controller
5. Director, Program Planning and Evaluation
6. Associate Director, Business Operations Center
7. Business Officer, Desert Research and Extension Center

B. APPROVAL OF EXCEPTIONS

The UC ANR Vice President has vested the following positions with authority to approve travel reimbursement of any dollar amount, including those that require approval of an exception to BFB G-28.

1. Associate Vice President
2. Associate Vice President Business Operations
3. Vice Provost of Research and Extension
4. Controller

V. PROCEDURES

Reference Appendix I, *Travel Procedures*

VI. RELATED INFORMATION

- [UC Office of the President Business and Finance Bulletin G-28, *Travel Regulations*](#)
- [UC ANR Business Operations Center](#)
- [AggieTravel \(for all non-Oakland-based personnel\)](#)
- [Connexus \(for all Oakland-based personnel\)](#)
- [UCOP Travel Reimbursement Procedures \(for Oakland-based personnel\)](#)

VII. FREQUENTLY ASKED QUESTIONS

Not used.

VIII. REVISION HISTORY

October 2017:

Format updated.

December 2020:

Content updated to reflect current practices, procedures moved to Appendix I, links added.