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FOREIGN TRAVEL REIMBURSEMENT CHECKLIST

REIMBURSEMENTS SUBMITTED WITHOUT COMPLETE DOCUMENTATION WILL BE RETURNED. RATES (PRIVATE CAR MILEAGE, DAILY MEALS & INCIDENTALS MAX, DAILY LODGING MAX, ETC) ARE SUBJECT TO CHANGE WITHOUT NOTICE.

- UC Berkeley Employee ID (EID) #, UC Berkeley Student ID (SID) # or UC Berkeley Vendor ID is required.

- All **Non-UC Employees/Students** that are **Non-US Citizens** must attach a copy of their visa, passport, and I-94 and fill out a UCB W-8BEN which can be found at: <http://www.ucop.edu/financial-accounting/files/taxation/w8ben.pdf> Please note that **International Visitors** must also submit the Certificate of Academic Activity which is available at: <http://ucop.edu/financial-accounting/files/taxation/coaa.pdf>. **U.S. Permanent Residents (Green Card holders)** must provide a copy of their Permanent Resident card.
- If submitting a **Faculty relocation** reimbursement, please contact financialcluster@me.berkeley.edu

- Trip purpose and Event info - must specifically state the trip's purpose or the nature of the business benefit derived as a result of the travel. Event Flyer/Brochure/Agenda or Invitation letter/e-mail showing meeting dates, times, and locations of Event is required.

- Airfare - Economy/Coach Class (including economy-premium/plus/elite) are allowed. Upgrades such as Business or First Class airfare tickets require additional documentation and pre-approval.

- Flight itinerary/airfare receipt is required for **ALL** travel reimbursement requests (even if the airfare expense is not being claimed). Travel dates/times and explicit destination of travel must be included in the request. If trip duration exceeds eight days, please attach additional travel form(s) to report meals and lodging expenses. Per University Policy, travel reimbursement requests must be submitted **within 45 days** of the end of a trip. Otherwise, a justification for the late submission must be provided. If trip includes multiple destinations, please complete a **separate** Travel Form for each leg/destination to itemize expenses for each segment of the trip.
- If taking an indirect route, personal days, or upgrades, obtain a comparison airfare quote at the time of booking (at least 14 days in advance of the trip) for the equivalent of a strictly business trip in economy class. The lesser of the actual costs & comparison flight will be reimbursed.

- Mileage reimbursements (\$0.545/mile) require a map with driving directions (e.g. from maps.google.com) for mileage verification. Relocation mileage is \$0.18/mile (effective 01/01/18). Gasoline expenses may not be reimbursed in addition to the mileage rate.

- Rental car and Ground Transportation - can be up to an **intermediate** size car. Receipt must be final, show detailed charges and proof of payment. please see: <http://www.me.berkeley.edu/sites/default/files/services/Car%20Rental%20Tips%20-%20Connexxus.pdf> and <https://travel.berkeley.edu/book-trip/book-rental-car> for additional information on renting cars for UC business.
- Travel Insurance - offered free of charge to all UC employees and students on official UC business trips. Sign up for University Travel Insurance **PRIOR** to departing. Please see <https://travel.berkeley.edu/obtain-travel-insurance>

- Our internal policy requires itemized receipts (e-Tickets accepted for airfare) for ALL expenses regardless of amount. Receipts must show method of payment (i.e. Visa + last 4 digits of the card) and the name on receipts must match Traveler's name. Hotel/lodging folios must list room, tax, service, and any other charges separately and must show a zero balance at checkout. Please translate receipts in foreign languages into English. Kindly convert foreign currency to USD using a currency converter such as Oanda: <https://www.oanda.com/currency/converter/> and please include a copy of the screenshot as part of your reimbursement request.
- Lodging, Meals and Incidentals - Travelers should only claim **ACTUAL** travel expenses (e.g. subsistence & lodging) up to the per diem rate. The daily per diem limit when traveling internationally varies by location and is based on the [U.S. State Department per diem rates](https://travel.berkeley.edu/understand-policy/travel-policy-nutshell).

- Membership fees require approval signature from the Department Chair.

- It is *against* University policy to book internet travel packages of hotel/airfare/car rentals unless "each aspect of the package will be separately itemized (e.g., itemized hotel charges, airfare, car rental, etc) to assure appropriate documentation for reimbursement." (UCOP Travel Policy G-28)
- Traveler's signature and Fund source to charge. (Approval signature and printed name required for requests from non-Faculty members)

- Please see <https://travel.berkeley.edu/understand-policy/travel-policy-nutshell> for additional information.

FINANCIAL CLUSTER FOREIGN TRAVEL REIMBURSEMENT REQUEST

08/01/18

This form is for the reimbursement of travel *outside* the Continental United States. Please submit reimbursement request electronically via [ERSO's intranet system](#). (Select Mechanical Eng, Jacobs Institute, or Nuclear Eng from the "PI/Center/Dept" drop down menu). Rates (private car mileage, maximum daily meals & incidentals, maximum daily lodging, etc) are subject to change without notice. Contact financialcluster@me.berkeley.edu for questions.

Please select one: **ME Dept** **Jacobs Institute/ME** **NE Dept**

Last Name, First: _____ EID or SID #: _____
 Work Phone: _____ E-Mail Address: _____

City & State of Residence: _____

US Citizen? Yes No *All **Non-UC Employees/Students** that are **Non-US Citizens** must attach a copy of their visa, passport, I-94, UCB W-8BEN (<http://www.ucop.edu/financial-accounting/files/taxation/w8ben.pdf>), and a Certificate of Academic Activity (<http://ucop.edu/financial-accounting/files/taxation/coaa.pdf>). U.S. Permanent Residents must provide a copy of their Permanent Resident Card.

Trip Purpose: _____

Trip Destination (City, Country)	Departure Date	Departure Time	Return Date	Return Time

Airfare: _____ - Airfare Direct Billed _____ = Airfare to Reimburse: _____ DirectBill ID (if any): _____
 Rental Car: _____ Rental Gas: _____ Parking: _____ Tolls: _____
 BART/Train: _____ Shuttle: _____ Taxi/Cab: _____ Baggage Fees: _____
 Private Car Mileage: _____ @ .545¢ = _____ From/To: _____ From/To: _____
 Other: _____ Description: _____ **Total Transportation Expenses:** _____

MISCELLANEOUS EXPENSES

Registration Fees: _____ Membership Fees: _____ Phone/Internet: _____ Fax/Copies/Supplies: _____
 Other: _____ Description: _____ **Total Miscellaneous Expenses:** _____

DAILY EXPENSES: only claim ACTUAL travel expenses (e.g. subsistence & lodging) up to the per diem rate

Was there any alcohol consumption claimed as part of your meal expenses for the trip? No Yes Conference Hotel? No Yes

Date:						
Breakfast:						
Lunch:						
Dinner:						
Incidentals:						
Total:						
Lodging:						

Grand Total _____ **Total Daily Expenses:** _____

Amount NOT Being Claimed _____ **Comments (if any):** _____
Total Amount Requested _____

Partial expense paid by others? No Yes Pls Explain: _____

Account	Fund	Dept ID	Program	CF1	CF2	Amount

I hereby certify that the above is a true statement, that the expenses claimed were incurred by me on official University business on the dates shown, and that I have attached original receipts (showing method of payment) as required by University and Departmental policy.

Traveler Signature _____ Date (mm/dd/yy) _____ Approver's Printed Name and Signature _____ Date (mm/dd/yy) _____