

Policy #: 310.0
Original Date: March 22, 2019
Last Review: September 26, 2025
Next Review: September 26, 2030

TITLE: TRAVEL POLICY

PURPOSE

To provide staff and management with policy and regulations governing business travel and to ensure that funds allocated towards travel are appropriately used, properly authorized, for a documented business purpose, substantiated by applicable receipts, correctly processed for payment, and in compliance with all applicable regulations and agreements. Any individual traveling on UEC official business is expected to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business and expending personal funds. Excess costs, circuitous routes, delays, or luxury accommodations and services that are unnecessary or unjustified in the performance of business are not acceptable under this standard. Individuals will be responsible for excess costs and any additional expenses incurred for personal preference or convenience.

There is considerable variation among the reimbursement rules of travel expenses, such as transportation and per diem, contained in various agency-sponsored programs. When there is a variance between agency and UEC guidelines, the basic rule is: **The agency or UEC, whichever is more restrictive, shall govern the travel.**

SCOPE

UEC will follow the California State University, San Bernardino (CSUSB) campus-specific Travel and Business Expense Payments Policy <https://www.csusb.edu/policies/travel-and-business-expense-payments-policy>, which is in compliance with the integrated CSU Administrative Manual policy number 03601.01 dated May 20, 2025 <https://calstate.policystat.com/policy/18199038/latest>. This policy applies to domestic and international travel for all UEC and Sponsored Programs personnel and related activities. International travel requirements can be found in section G, International Travel, and section H, *Travel Restrictions*. This policy and procedures supersede any practices in existence prior to its effective date.

POLICY

UEC and Sponsored Programs travelers seeking reimbursement for travel-related expenses must submit a completed Travel Expense Claim form. UEC will continue to accept Travel Expense Claim forms, but recommends using the CSUSB electronic travel system (Concur is the name of the current system) whenever possible to file travel expense reimbursement. The CSUSB electronic travel system is a cloud-based solution offering paperless, electronic travel request and reimbursement. The CSUSB electronic travel system will automate travel requests, bookings, and expense reporting of campus business travel. The system has been fully implemented and can be used for travel funded by all business units. Below are some key advantages the system offers:

- Automated routing of travel requests and expense voucher authorization.

- E-Receipts are automatically submitted into the system by participating vendors or by users emailing/uploading them to the system.
- 24-hour online booking for airfare, hotel, and car rental reservations.
- Minimize out-of-pocket expenses for travelers through direct billing and payment of airfare.
- Convenience through built-in automated features for compliance, mileage calculation, currency conversion, etc.
- Email notification and reminders of events at designated time intervals and events.

A travel approver will be required if a Principal Investigator, Project Director, or sponsored programs project employee uses the CSUSB electronic travel system. If approval flow is not established, contact your Research Analyst for arrangements. The travel approver will typically be the VP, Dean, Chair, Principal Investigator/Project Director, or the Principal Investigator/Project Director or designee for all other project personnel.

All Research Analysts have access to review and approve all travel requests and claims submitted in the CSUSB electronic travel system. The Research Analyst will be the budget approver (final approver) for all sponsored program funds, and upon their approval, the claim will be released for payment processing.

- Any exceptions to the Travel Policy require advance written approval from the UEC Executive Director or Designee for non-Sponsored Programs business and the Director of Sponsored Programs or Designee for Sponsored Programs related business.

A. Hospitality

Procedures and questions related to Hospitality policy, not otherwise covered in this policy, should default to University Enterprises Corporation *Hospitality Policy* 305.0.

B. International Travel

- UEC and Sponsored Programs travelers seeking reimbursement for international travel-related expenses must submit reimbursement claims through the CSUSB Concur Travel and Expense portal.
- International travel must be a budgeted activity on a sponsored project.
- UEC employees, Principal Investigators, Project Directors, and project staff are required to submit a fully completed and authorized "Foreign Travel Approval / Insurance Request" form to the CSUSB Risk Management Office at least 30 days prior to their departure for approval. This advance notice is needed in order to secure coverage in CSURMA's foreign travel insurance program offered through ACE. This insurance provides medical and other important coverage in the event of an emergency situation.
- Prior to making travel plans, the following travel warning lists must be checked to determine if the travel destination is on the list:
 - U.S State Department Travel Warning List

- CSURMA High Hazardous Country/War Risk List
- If the destination appears on the "War Risk" country list, the form must be submitted **at least** 30 days in advance of departure to obtain approval of the Chancellor's Office as well.
- It is recommended that all employees traveling internationally sign up for the State Department's Safe Traveler Enrollment Program (STEP).
- Some federal agencies require additional prior approval in advance of completing international travel. Check the specific terms and conditions from your sponsor and obtain them if required, and submit them attached to the travel request to your Research Analyst.

RELATED FORMS & POLICIES

<http://uec.csusb.edu/documents/305.0HospitalityPolicy.pdf>

<https://calstate.policystat.com/policy/16577430/latest#autoid-emq8q>

<https://calstate.policystat.com/policy/16577430/latest#autoid-d47dq>

Fly America Act - <https://www.govinfo.gov/app/details/USCODE-2011-title49/USCODE-2011-title49-subtitleVII-partA-subparti-chap401-sec40118>.

Approval:

Approved by the UEC Board of Directors on September 26, 2025