

SSoE Purchasing and Reimbursements Digest, November 2024

The SSOE Purchasing & Reimbursements Department is happy to have you back on campus. Now that on-campus activities and travel are increasing, here are a few friendly reminders.

Purchasing –



Here are some reminders from UCI Procurement:

You are not authorized to sign on behalf of the University or to bind the University in any manner. It is a violation of federal and state law and UC policy to procure a service or commodity without acquiring the necessary approval and documents in advance. To ensure compliance with UC policy, you must submit your purchase request to the SSoE's Purchasing & Reimbursement Department for review and proper processing to place your order.

Example 1: You need to buy custom t-shirts for a team competition. You may contact an approved supplier and discuss your needs, lead times and get final pricing. Since you are not authorized to place an order on behalf of the University, you may not provide approval to the vendor to proceed. You will let them know that you need a quote from them based on your discussion so that your purchasing department can properly process the transaction.

Example 2: You need service on lab equipment. You may contact a service provider to discuss the problems and get pricing and availability. Since you are not authorized to procure a service, you may not agree to or schedule the service yourself. You must ask for a quote/estimate for the service. To comply with UC policy, you will then complete a purchase request form and include the quote/estimate as an attachment. The SSoE P&R Department will process your request ensuring that the necessary approvals and documents are in place prior to procuring the service.

Please note that most lab or office supplies orders placed for various catalog items don't need prior authorization aside from PI/Departmental approval.

Travel Reimbursement –

- All receipts over \$75 showing payee, date and proof of payment are required, **no exception**.
- Domestic travel (CONUS, less than 30 days) does not allow a per diem amount— actual meal amounts are reimbursable via the Meal log (\$92 daily max). Alcohol as part of daily meals is not reimbursable while on Business travel.
- The current maximum daily lodging rate is \$333 per night for trips within the continental United States that are less than 30 days. This rate does not include taxes or fees.
- Car Rental companies with UC contracts (Enterprise, National, Hertz, Dollar and Thrifty) include CDW, LDW, and SLI insurance and should be used for business travel. Additional rental car insurance purchased for CONUS travel will not be reimbursed (CDW, LDW, and SLI).
- Travel insurance purchased privately for business travel is not reimbursable.
- Do not use package deals (Expedia, Travelocity, etc.). These are generally ineligible for reimbursement because package deals often do not separate the cost of the hotel, air and car costs.



- When combining business and personal travel, before or at the time of booking, obtain a comparison quote from ConnexUC or Google Flights for the business-only fare. Compare the cost of the combined trip to the business-only fare. If the combined trip is more expensive, deduct the difference from the reimbursement request.

Here are some helpful tips for a smooth reimbursement process when business and personal travel are combined:

1. Plan your trip based on the business itinerary: This involves using the [G-28 Travel Policy](#) guidelines to obtain quotations for airfares, hotel reservations, rental car estimates, and other relevant business expenses. Save all comparison printouts.
2. Book your personal itinerary at the same time: This involves making reservations using the most economical and available methods to minimize any additional costs incurred due to the personal itinerary. Add an explanation if other people accompanied you on your Business trip.
3. Submit your travel reimbursement request: Include the comparison printouts and actual documented expenses as a reference to demonstrate that no additional costs were incurred.
4. Provide a detailed explanation about the itinerary including business dates and personal travel dates: This will help to clarify the details of the business trip and provide additional context for the reimbursement request.

Entertainment Reimbursement –

Please make sure that food vendors used for campus delivery are on the approved list <https://food.uci.edu/catering/> Pick-up from a food vendor is not regulated.

If a vendor used is not on the approved list, the payee must provide an explanation of why this vendor was selected, which will be used as the basis for the Dean’s exceptional approval review. Please note that not all exceptions are approved.



Redacting Sensitive Information in Scanned Images



Documents that contain [sensitive data](#) in violation of UCI’s Information Security Policies need to be **redacted by the payee**. This includes all types of sensitive data listed under [Protection Levels 3, 4 and PII](#)

Examples include: full credit card numbers, financial information-bank account numbers, protected health information (PHI), Social Security numbers, Sensitive identifiable human subject research data, driver’s license numbers or state-issued identification card numbers (including passport numbers, and Medical/Health information.

QUESTIONS BEFORE YOU TRAVEL?

QUESTIONS BEFORE YOU TRAVEL? We are here to help you and facilitate your research and business needs. Check SSoE [Travel Tips](#) here or contact SSoE Purchasing and Reimbursements Dept **BEFORE** booking your travel at soepurchasing@uci.edu