TRAVEL & EXPENSE MANAGEMENT

Office Hours | Meeting Recap

October 20, 2026 • 1:00 p.m.

This recap summarizes updates and reminders shared during Travel & Expense Management Office Hours for campus employees and departments who could not attend.

Higher Approval and Exception to Policy Updates

Effective January 1, 2027, Higher Approval requests must be submitted and fully approved before an event occurs or related purchases are made. Requests submitted after the event will not be approved. Over the past two years, 48% of Higher Approval requests for employee morale-building and staff appreciation events were submitted after the event. Departments should initiate requests as soon as event planning begins.

Exceptions to policy are intended for unique or extenuating circumstances and are considered only on a one-time basis. An approved exception does not change policy or create an ongoing allowance. Repeat requests for the same or similar circumstances will not be approved.

Common Exceptions in 2026 — How to Avoid Them

Personal time combined with business travel: Obtain an airfare comparison at the time of booking showing the fare for business-only dates. The University cannot cover costs associated with personal travel, and after-the-fact comparisons do not document the rates available when airfare was purchased.

Late expense submissions: UC Travel Policy G-28 calls for expense reports within 45 days of completing travel. Reports submitted more than six months after travel have been a recurring exception; even with an approved exception, late reimbursements may be taxable.

Travel & Entertainment Card Reminder

Pay Travel & Entertainment card balances on time to avoid late fees. The card account itself is not reported to personal credit bureaus and does not affect a cardholder's personal credit.

Travel Reservations and Processing Reminders

- 1. Submit Travel Reservations in Advance — Travelers and departments should submit travel reservation requests as far in advance as possible to allow adequate time for review, required approvals, and travel arrangements.
- 2. Ensure Complete and Accurate Supporting Documentation — Include all information required to support each travel or reimbursement request, including itemized receipts, business purpose, funding information, and applicable approvals.
- 3. Take Timely Action on Pending Transactions — Departments should review and approve pending requests promptly. Requests awaiting approval or additional information can delay processing and employee reimbursement.

Training Resources

A new video has been added to the Travel Video Library. Employees are encouraged to check regularly for additional guidance and training resources.

Travel Video Library: https://travel.ucmerced.edu/videolibrary