

Cluster 5 Business Office – Guide to Purchasing

Undergrad/Grad student groups: cfivegradbusiness@ucdavis.edu (Jastro or student award)

ESP: ESPbusiness@ucdavis.edu ARE: AREbusiness@ucdavis.edu HE: HEbusiness@ucdavis.edu (faculty account)

Professional expense reimbursements for Non-Travel/Entertainment exceeding \$499 (including tax & shipping) that have not been Pre-Approved will require a Confirming Order Justification Form. This form will be sent to the CAO and Dean's Office for signature. **NOTE: reimbursement could be denied.** (Please include Business Purpose briefly describe how the expense benefits the research, instructional and/or outreach mission of the university)

A. **Purchases/Reimbursements:** UCD prefers to avoid out-of-pocket expenses. To prevent this, purchase requests should be sent to the Business Office with the following:

- a. Completed Purchase Request Form
- b. Order details. Specific URLs work best to ensure the exact size, color, etc. is purchased.
- c. Approximate price of each item.
- d. Quantity of each item.
- e. Chart String.
- f. Date needed.

B. **Travel Purchases/Reimbursements:** Flights should be booked through [AggieExpense/BCD**](#)

(NON-EMPLOYEES) - Request Business Office to set up and provide a Traveler ID. This is required for reimbursements and to book reservations with BCD Travel. BCD Travel Contact: connexus.travelrequests@bcdtravel.com (877-885-8632) fees do apply**

Employees should use a university issued Travel and Entertainment Visa card for all business-related expenses. Helpful tools are available at [Travel Card Expenses](#).

- a. Complete the Travel Expense Form
- b. Meal Reimbursements for Travel under 30 days within the lower 48 states are limited to \$79.00/day and must include an overnight stay to claim meals. Receipts are required for meals over \$75. Travelers who appear to be treating the daily meal limit as a per diem, by claiming the full amount or another fixed amount on a repeated basis without additional justification, will be required to provide supporting receipts for future meal claims. Travel maximum daily limits are available on the [US State Department website](#).
- c. Receipts, especially for airfare and lodging should include date, city of purchase, and method of payment. **NOTE: Airfare purchased by miles/points or gift cards are NOT reimbursable and Boarding Passes cannot take the place of an Itinerary.**
- d. Travel outside of California must be registered with [UC Away](#) (registration is automatic when booking in AggieExpense)
- e. Alcohol is not permitted when charging the expense to a State or General fund source.
- f. Lodging has a domestic daily allowance of \$333 (pre-tax), Lodging Limit Justification Form can be found on UCD Website, if the limit is higher than allowed.
- g. University travelers may share a room. Please verify with PI, Business office or travelhelp@ucdavis.edu before booking. The hotel should split the bill and each traveler should pay their portion. During [Group Travel](#), the group leader pays for the room.

C. **Entertainment Purchases/Reimbursements:**

- a. Complete an Entertainment Expense Form
- b. Include all receipts, including method of payment
- c. Food & beverage receipts must be itemized.
- d. Event flyer and/or agenda
- e. Attendee list or sign in sheet including, first and last name, email and affiliation.

D. **Contracts & Procurement: (Up to 4-6 weeks) Work should NOT begin until full campus approvals are in place:**

- a. All independent contracted suppliers will require a pre-arranged contract with procurement. For further information please contact the business office directly.

All Purchase Requests should route for PRE-APPROVAL to comply with UC Policy