

All Purchase Requests should route to The Business Office in a timely manner for PRE-APPROVAL to comply with UC Policy Procedures.

(Including the Business Purpose supporting one or more of university tenets of *Teaching, Research, and Public Service*)

Important: Any non-related Travel/Entertainment purchase over \$499 (including tax & shipping) can cause the need for a Confirming Order Justification Form sent to the CAO/Dean's office for signature. **NOTE: reimbursement could be denied.**

Purchases & Reimbursement fall into the following categories:

- A. **Gifts, Supplies, Equipment and misc. Purchases/Reimbursements:** UCD prefers to avoid out-of-pocket expenses as much as possible. To prevent this, purchase requests should be sent to the Business Office with the following:
1. Fill out and submit Purchase Request Form
 2. Order details. Specific URLs work best to ensure the exact size, color, etc. is purchased.
 3. Approximate price of each item.
 4. Quantity of each item.
 5. Account to charge.
 6. Date needed.

- B. **Travel Purchases/Reimbursement:** Flights should be booked through [AggieExpense/BCD**](#). (NON-EMPLOYEES - Request Business Office to set up and provide Traveler ID required to book reservations with BCD Travel Agent; connexus.travelrequests@bcdtravel.com, 877-885-8632)

Travel card is to be used **only** for approved and appropriate business travel and business entertainment expenses. Helpful tools are available for all [Travel Card Expenses](#).

1. Fill out and submit Travel Expense Form
2. (*Effective September 9, 2022) Meal Reimbursements for Travel under 30 days within lower 48 states are limited to \$79.00/day, must include overnight stay to claim meals. Receipts are *not* required for meals, in repeat basis supporting documentation may be required for future meals.
Foreign travel maximum daily limit is available on the [US State Department website](#).
3. Receipts, especially for airfare and lodging should include date, city of purchase and method of payment (CC, Cash, Check) **NOTE: Airfare purchased by miles/points or gift cards are NOT reimbursable & Boarding Passes cannot take the place of an Itinerary.**
4. International travel must be registered with [UC Away](#) (automatic when booking in AggieExpense)
5. Alcohol is not permitted when charging the expense to a State or General fund source.
6. Lodging has a domestic daily allowance of \$275 (pre-tax), Lodging Limit Justification Form can be found on UCD Website, Travel & Ent. (Meals & incidentals charged to room will be applied to daily M&I allowance)
7. 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 pays their own portion. During [Group Travel](#), the group leader pays for the room.

- C. **Entertainment Purchases/Reimbursements: Venue, food, napkins, note pads, etc. purchased for meetings or events are covered under Entertainment.**

1. Fill out and submit Entertainment Expense Form

2. Include all receipts, including method of payment (CC, Cash, Check)
3. Food & beverage receipts must be itemized.
4. Event Flier and/or Agenda
5. Attendee List or sign-in sheet are required for Entertainment meal expenses. List First & Last Name, email and their affiliation with UC Davis.

D. Contracts & Procurement: (Up to 4-6 weeks) Work should NOT begin prior to approval

All service vendors (Individuals, transcription, language translator, etc.) require a pre-arranged contract with UC/UCD. Although several vendors are already established but it's best practice to check with the Business Office if further action or documents are required.

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