CAMP TECHNOLOGY: CONNECTING PROCESSES
Backpacking to Discover MyEvents

Presented by Nancy Herbst
PC West: Bear Room | 11:00 – 11:45
MyEvents is a payment tool for UC San Diego meetings and entertainment that falls under UCOP BUS-79 policy.

This presentation is designed to shine some light on the ‘how-tos’ and remind you of things to keep in mind when processing.

I’m Nancy Herbst, Manager for Travel & Entertainment.

Don’t worry about getting lost on this hike; the presentations will be made available after today’s event.
THE MYEVENTS PROCESS

- Announcement window
- Creating MyEvents
- Viewing existing MyEvents

MYMEETINGS & HOSTED EVENTS

Welcome

Use MyMeetings and Hosted Events (MyEvents) to claim expenses for business entertainment, a meeting, or certain other university sponsored events:
- Reimburse an employee as a host or meeting / event coordinator
- Reimburse the Travel Card of an employee as host or meeting / event coordinator
- Issue a payment or deposit directly to a vendor / merchant

Catering an event? Avoid delays in processing your MyEvents payment by ensuring your catering contract has been signed by Procurement and Contracts or you have received a PO Cancellation. Request via Marketplace. Visit How to Engage a Caterer or Restaurant for an Event.

GET STARTED
- Create a new document
- View or edit an incomplete document
- View or edit an incomplete deposit document
- View a completed document
- Help / Getting Started
- Contact the UCSD Travel and Entertainment Team
SETTING UP A VENDOR

• Gather Name, Address, and W-9 for your vendor request
• Log-on to your MyTravel homepage
• Click on ‘Update or add a vendor account’
SETTING UP A VENDOR

• Complete the fields and submit.
• Request is sent to BFSupport
• You may attach the W-9 to the BFSupport case or we will request it.

NEWS FLASH!

• You soon will be able to attach the W-9 when submitting the vendor account request.
You will receive the message after you hit submit.

The vendor information has been submitted successfully for approval.
Vendor accounts are generally added to the system within one business day.

The vendor account ID (ex: 00121212E) will be emailed to you (preparer) once it is set-up. This confirmation will come through BFSupport.

Use this ID to create a prepayment to the vendor.
THE MYEVENTS PROCESS

Starting a new MyEvent

• Select Create a new document

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The entertainment team is currently processing claims that came into its queue on September 15, 2015. Read the most recent travel and entertainment announcements that went out on September 23rd (http://www-bfs.ucsd.edu/distservpdf/fileServe_0915.pdf). Information included the new direct bill for local hotels.
THE MYEVENTS PROCESS

Selecting the Event Type

**Step 1: Event Type**

**Event Type**

What is the nature of this Event?
Please select the business nature for the event from one of the seven types.

- HOSTING Guests, Functions. [See categories]
- MEETING Employees, others. On UCSD Premises. [See categories]
- CELEBRATING Employee Appreciation, Morale. [See categories]
- ATTENDING Community Events, Fundraising. [See categories]
- EXTENDING Hospitality. [See categories]
- PROVIDING Work, Program Related Meals. [See categories]
- SPONSORING Student Events, Occasions. [See categories]

Clicking on the nature of an event will automatically move you to the next screen.

Click the “See categories” link to help you determine if the Event Type you are considering is the best choice.

**Previous** Save and Exit  Next
## THE MYEVENTS PROCESS

### Selecting the Event Type

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MEETING Employees, others. On UCSD Premises</strong></td>
<td>Grant project discussions</td>
</tr>
<tr>
<td>• Administrative, planning, workgroups</td>
<td>Lab meeting</td>
</tr>
<tr>
<td>• Planning, mentoring, workgroups (Faculty, Staff, UCSD students)</td>
<td>Research collaboration within UCSD</td>
</tr>
<tr>
<td>• Formal training sessions</td>
<td>Mtg space like hotel conference room can be meeting</td>
</tr>
<tr>
<td>• Professional association, scholarly society, external organization</td>
<td><em>(If alcohol is served, needs to be hosting; PPM510 will be required)</em></td>
</tr>
<tr>
<td>• UC-wide meetings, Academic Senate, Regents</td>
<td></td>
</tr>
<tr>
<td><em>Meal over the CPP requires special entertainment approval</em></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HOSTING Guests, Functions</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Donor, donor cultivation</td>
<td>Dinner to discuss donor prospects</td>
</tr>
<tr>
<td>• Prospective academic or administrative appointee</td>
<td>Dinner to discuss research and seminar</td>
</tr>
<tr>
<td>• Reception by invitation</td>
<td>Recruitment lunch</td>
</tr>
<tr>
<td>• Recruiting graduate student, student athlete, scholar</td>
<td>Dinner with research group following a lecture</td>
</tr>
<tr>
<td>• Visitor, official guest (person or organization)</td>
<td>Research collaboration with others outside of the University</td>
</tr>
<tr>
<td>• Administrative, planning meeting held offsite</td>
<td>UCSD employees gathering off-site (at a restaurant or private residence)</td>
</tr>
<tr>
<td><em>Spouse/partner participation or over CPP requires special entertainment approval</em></td>
<td><em>(Host needs to be present)</em></td>
</tr>
</tbody>
</table>
# THE MYEVENTS PROCESS

**Selecting the Event Type**

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CELEBRATING Employee Appreciation, Morale</strong>&lt;br&gt;• Appreciation, recognition, length of service&lt;br&gt;• Employee morale group event, holiday party, picnic&lt;br&gt;• Retirement, farewell&lt;br&gt;&lt;small&gt;<em>All require special entertainment approval</em>&lt;/small&gt;</td>
<td>Welcome celebration to introduce new faculty member to support staff&lt;br&gt;Lunch celebration of recruitment project completion&lt;br&gt;Department holiday celebration</td>
</tr>
<tr>
<td><strong>ATTENDING Community Events, Fundraising</strong>&lt;br&gt;• Fundraising events (including purchase of tables)&lt;br&gt;• Tickets to sporting, theatrical, musical event</td>
<td>Tickets to IMAX encourage std part in science &amp; tech program&lt;br&gt;&lt;em&gt;SD Business Journal&lt;/em&gt; Women Who Mean Business Golf</td>
</tr>
<tr>
<td><strong>EXTENDING Hospitality</strong>&lt;br&gt;• Open house&lt;br&gt;• Reception, open invitation to general public community&lt;br&gt;• Visitor&lt;br&gt;&lt;small&gt;&lt;em&gt;Spouse/partner participation or over the CPP requires special entertainment approval&lt;/em&gt;&lt;/small&gt;</td>
<td>Opening reception for an exhibition&lt;br&gt;Department open house&lt;br&gt;Library book club meeting&lt;br&gt;La Jolla Del Sol apartments extending for community building events</td>
</tr>
</tbody>
</table>
# THE MYEVENTS PROCESS

## Selecting the Event Type

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROVIDING Work, Program Related Meals</td>
<td>Educational conference</td>
</tr>
<tr>
<td>• Employee on-the-job meals (no part list required)</td>
<td>Lunch provisions for research subjects</td>
</tr>
<tr>
<td>• Grand rounds (Medical Center) (no part list required)</td>
<td>Journal Club</td>
</tr>
<tr>
<td>• Volunteers and research subjects (no part list required)</td>
<td><strong>NOT for a meeting that is held during the lunch hour</strong></td>
</tr>
<tr>
<td>SPONSORING Student Events, Occasions</td>
<td>Gathering for graduate students</td>
</tr>
<tr>
<td>• Athletic team, training, game related (at home, no travel)</td>
<td>Quarterly social event/social hour</td>
</tr>
<tr>
<td>• Continuing education, self-supporting programs</td>
<td>Graduate students taking speaker out to discuss seminar.</td>
</tr>
<tr>
<td>• Gatherings, awards banquets, or meeting stds (students only plus UCD facilitator / organizer)</td>
<td>Tickets for zoo, boat excursions, field trip related activities</td>
</tr>
<tr>
<td>• Orientation, commencement (no part list required)</td>
<td>for students remain on sponsoring, not attending.</td>
</tr>
<tr>
<td>• Speaker – Student (637592)</td>
<td></td>
</tr>
</tbody>
</table>
THE MYEVENTS PROCESS
The Event information

- If more than one MyEvent is being processed for a single event, be sure to cross-reference the other event number(s).
- When multiple MyEvents are required, also attach a ‘general’ budget so approvers can reasonably determine the anticipated per-person meal expense.
- If the event is being held at a restaurant offsite, then the event cannot be a meeting event type.
- Needs some help? Click on See examples...
THE MYEVENTS PROCESS

Guests

For multiple participants, you can upload a sign-in sheet, Excel file, etc.

REMINDER: Be sure to include the title and company affiliation.

- Ex: Nancy Herbst, Travel Manager, UCSD

Research subjects can include first name and last initial

- Ex: Nancy H, Research Subject
UCSD does not reimburse employees for frequent or routine expenditures for meals or light refreshments as they're considered taxable income by the IRS.

For meetings and entertainment events, limit:

- Meals to once per month, per group
- Light refreshments to twice per month, per group

While MyEvents asks the “frequency” question only for Meeting types, the limitations also apply to Hosted events.
Spouses in attendance

- Donor activities
- Donors are not considered one donor and one spouse but instead as two donors
- Recruiting – if the spouse of the candidate is in attendance

When the spouse works at UCSD
- Role is considered “employee” when attendance is that of an employee
THE MYEVENTS PROCESS

Payment

- If Host or Meeting Coordinator is selected, the system will auto populate with payee information.
- If vendor or another employee that wasn’t the host or meeting coordinator, select Business/Entity in the payee search field.
- Indicate the invoice number if paying a vendor.
- You can note the system generated MyEvent number here:
Remember those per-person meal maximums!

• You must provide a written justification if expenses exceed the per-person meal maximum, including reasons why the higher costs were unavoidable and necessary to achieve a business purpose.

• If it exceeds 200% over the limit, the event must be approved by the Chancellor.

The per-person meal expense is for the entire event:

• Includes pre-meal items (e.g., beverages and hors d’oeuvres), meal, labor, sales tax, delivery charges, and other service fees)

• Does not include room rental, setup fees, media rental fees, decorations, and other non-meal expenses (list these under “Other”)
THE MYEVENTS PROCESS

Payment – What are the cost per person limits?

What is the per person maximum for light refreshments?

What is the per person maximum for breakfast?

What is the per person maximum for lunch?

What is the per person maximum for dinner?

$18/19

$26/27

$45/47

$78/81

“/” as of March 1, 2016.
Itemized receipts are required for all expenses $75 or more and for all special entertainment (any amount)

But remember....

- Faculty and staff morale-boosting functions, such as appreciation, recognition, length of service, retirement, farewell, picnics or holiday gatherings, must serve a UC San Diego business purpose and can be approved as special entertainment if costs are:
  - Limited to only the employees in attendance
  - Permitted under the fund source
  - Celebrations for retirement: Employee must be separating from the University with at least 5 years of service
THE MYEVENTS PROCESS
Accounting

Step 5: Accounting

- This is a "Special Event". Please be sure to follow the fund-source requirements.

Accounting Distribution

<table>
<thead>
<tr>
<th>Index</th>
<th>Account Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>BFSXXX</td>
<td>637465, Celebrations - Employee and Non-employee Social Events</td>
<td>$50.00</td>
</tr>
<tr>
<td>BFSXXX</td>
<td>635380, Rental of Supplies</td>
<td>$20.00</td>
</tr>
<tr>
<td>BFSXXX</td>
<td>637465, Celebrations - Employee and Non-employee Social Events</td>
<td></td>
</tr>
<tr>
<td>BFSXXX</td>
<td>637465, Celebrations - Employee and Non-employee Social Events</td>
<td></td>
</tr>
</tbody>
</table>

Total: $70.00
The system will automatically remove any approver from the template if the approver is:

- Preparer
- Host
- Payee

If no individuals remain to approve, the system will not allow the prepare to continue.

Templates cannot be modified by Travel. Instead, contact your Department Security Administrator (DSA) to make changes to templates.
The MyEvents Process

Approvals -- Hierarchies

Standard and Special Entertainment

- Level 1: UCSD Travel
- Level 2: Department contact with delegated authority to approve entertainment
- Level 3: Fund Manager
- Level 4: Preparer (template owner)

VC/ designee with delegated authority to approve special entertainment

MyEvents will add this step, if required, it doesn’t need to be included in the preparer’s INV/ENT approval template.

Meetings and Programmatic Events

- Level 1: UCSD Travel
- Level 3: Fund Manager
- Level 4: Preparer (template owner)

Host

MyEvents will send an e-mail to obtain host approval, if required.

Individuals with delegation of authority for standard or special entertainment must have the required delegation form on file with Travel.
### THE MYEVENTS PROCESS

**Review & Submit**

#### Step 7: Review & Submit

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Event Information</th>
<th>Guests</th>
<th>Payment</th>
<th>Accounting</th>
<th>Approvals</th>
<th>Review &amp; Submit</th>
</tr>
</thead>
</table>

**STEP 1: EVENT TYPE**
- Document Reference Number: GAO00000097
- Event Type: Hosting
- Business Purpose: Visitor, official guest (person or organization)

**STEP 2: EVENT INFORMATION**
- Event Date: 09/02/2013
- Event Location: Sammy's Pizza
- Event Status: Incomplete
- Event Description: Staff Quarterly meeting to discuss new funding opportunities. Update new staff on procedures. Prepare for upcoming budget deadlines.
- Host: COLEMAN, SALOME
- Alcohol expense claimed?: N

**STEP 3: GUESTS**
- Participant Count: 2
- Did a spouse or partner attend the event?: N
- Participant file attachment: [Doc.Ni.MyEvents.docx](#)

**STEP 4: PAYMENT**
- Payment Type: Reimbursement
- Lunch Expense Amount: 10.00
- Total Expense Amount: 15.00
- Payee Name: COLEMAN, SALOME
- Payee ID: 002276847
- Payee Address Type: QA
- Message to payee: 3/2/13 staff budget meeting at Sammy’s
- Ledger reference: GAO00000097

#### STEP 5: ACCOUNTING

<table>
<thead>
<tr>
<th>Index</th>
<th>Fund</th>
<th>Account</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>BFSFOGC</td>
<td>69768A</td>
<td>637264</td>
<td>15.00</td>
</tr>
</tbody>
</table>

#### STEP 6: APPROVALS

Approvers for this document, including the host/meeting coordinator, can log into MyApprovals to view and take action (the approval email request does not need to be resent).

<table>
<thead>
<tr>
<th>Preparer</th>
<th>Approval Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLEMAN, SALOME</td>
<td></td>
</tr>
<tr>
<td>SMITH, LASHON W.</td>
<td></td>
</tr>
<tr>
<td>MOON, KELSEY S.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department</th>
<th>Approval Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLEMAN, KIMBERLY E</td>
<td></td>
</tr>
</tbody>
</table>

Approval Template INV / EN2 was used to choose the Fund Manager Approver. Approval Template INV / EN2 was used to choose the Entertainment Approver.

By clicking the “I Agree” button you are certifying that:
- The expenses are for official University business
- The expenses were incurred on the date(s) indicated
- You have provided receipts for each expense $75 or greater.

[Optional: Print page for your records]
THE MYEVENTS PROCESS
Using Send for Review to request clarification

The required response is outlined below (please do not send an e-mail reply to this system-generated message).

Hello SALOME COLEMAN,

You are receiving this email from MyApprovals because SALOME COLEMAN asked you to see the comments below and respond in order to complete the post-transaction review.

This is the link to the image of the document:

https://act-qa.ucsd.edu/myapprovals/review?DID=4-1901378235574050&testreviewer=salicoles@ucsd.edu

*** Comments from SALOME COLEMAN to SALOME COLEMAN: ***

Please reply with titles for guest list along with specific topic/agenda for 9/2 meeting. Thanks!
THE MYEVENTS PROCESS
Using Send for Review to request clarification

MyApprovals Document Review

SALOME COLEMAN has asked that you review this document.
Scroll down to view the document details.
Please answer the following questions.
Press the 'Submit' button when you are finished.

Comments from SALOME COLEMAN
Please reply with titles for guest list along with specific topic/agenda for 8/2 meeting. Thanks!

Questions to Answer
Please answer the following questions:

- Incomplete event description
- Budget meeting to discuss and prepare for FY13-14
- La Shon Smith, Ent Spec - Travel
- Sali Coleman, Ent Spec - Travel

Additional Comments
Enter additional comments:

Thank you!

Click here to view the MyEvents audit history

Submit
THE MYEVENTS PROCESS

Checking the status

<table>
<thead>
<tr>
<th>Document Reference Number</th>
<th>IFIS Document Id</th>
<th>Event Date Range</th>
<th>Last Updated Range</th>
<th>Preparer Id</th>
<th>Event Type</th>
<th>Business Purpose</th>
<th>Filter Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>GAO0001184</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>All</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/10/2014</td>
<td>to</td>
<td>03/11/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Can search by preparer.

If corrections need to be made, the Restart option is the only way to make the edit.

Will reflect lowest outstanding approval level

New feature!
• Consider the amount of personal risk the host will need to accept
• Invitation needs to reflect that UCSD is hosting the event
• Follow IRS policy when making payment for services to individuals such as servers or cooks.
• Remember that payment for these services is considered income to the recipient and must be reported to the IRS for tax purposes.
• Collect names and Social Security numbers of recipients of payments for personal services. Include your contact information in the request so that Travel staff can obtain the Social Security numbers and enter this data directly into a secured application at the time of processing.
• Contact Jon Schmidt, Director of Risk Management (x43782) or by email to learn about potential risk and ways in which to minimize it.
THE MYEVENTS PROCESS
Special Considerations – Attending Community Events and Fundraisers

- Attending community events and fundraisers
- Receipt must breakout the “meal” from the “donation”
- If the individual pays directly, then s/he can only be reimbursed the amount of the “meal”
- If paying by Travel Card, the payment must be sent with the transmittal memo and the receipt should reflect UCSD as the payee
- Reimbursements to the Travel Card through MyEvents must include the transmittal letter and receipt (if available)
- If paying by check, the transmittal letter must be uploaded in MyEvents
THE MYEVENTS PROCESS
Special Considerations – Receipts

- Expenses of $75 or more must be supported by ‘original’ itemized receipt
- If it is special entertainment, receipts required regardless of amount.
- If the expense being claimed exceeds $75 but is comprised of two receipts, each less than $75, the receipts are required
- Lost receipts need to include a description of what steps the host/department did to obtain a duplicate receipt and what is being done to avoid future lost receipts
- If a credit card statement is being submitted when the receipt is lost, redact the credit card number, home address, and personal purchases
Don’t forget that catering vendors must have a contract signed by Procurement and Contracts or a PO CN# prior to the event and prior to submitting them through MyEvents for payment/ deposit. *When a vendor is providing services only for the preparation and/or service of food or beverages, use catering iRequests (bar service, chefs, waiters, etc.)*
Keeping Current
Join our mailing list

Travel
- Before You Travel
- Booking Options
- Expenses & Reimbursements
- Meetings & Entertainment
- Moves & Transfer
- Training & Guidelines

Departments
- Travel
- Disbursements
- Procurement & Contracts

See also
- Book travel
- MyTravel
- MyEvents

Travel news
- Submit MyTravel and MyEvents claims by December 12 to have expenses included in the 2014 calendar year.
- The Travel and Entertainment Team is pleased to announce that it is offering classes via UC Learning! We look forward to seeing you.

Do you need to...
- Ask a question
- Apply for a Travel Card
- Preauthorize travel
- Book travel
- Claim travel expenses
- Claim meeting & entertaining expenses

Top 10
- Receipt requirements
- Mileage rates
- Calculating per diem
- Fly America Act
- Renting a car
- Meals for domestic travel
- Business travel insurance
- MyEvents: event examples
- About Connexous

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Camp IPPS
Integrated Procure-to-Pay Solutions
ENHANCEMENTS

Have one? Let us know. Some of our greatest features are from feedback from our preparers and approvers!
Oh my, I hope we have enough time for some Q&A....
This presentation will be made available after today’s event.

Nancy Herbst
Manager, Travel & Entertainment
Nherbst@ucsd.edu
858.534.1309

Stephanie Chernau
Travel Analyst
SChernau@ucsd.edu
858.822.1756
Don’t forget to stop by and visit us in the Price Center East Ballroom