Director’s Note

Travel continues to visit campus departments to offer in-person guidance (Q&A Sessions) and respond to questions on policy, procedure and process. To assist with outreach efforts BFS Disbursements and Travel conceptualized our annual Open House to provide an opportunity to meet all of you. However, we quickly identified these two resources didn’t allow for all departments to attend, thus, the very first Disbursements and Travel University day was held on September 10 at the Price Center. BFS Disbursements and Travel invited attendees to participate in 1-hour training sessions with UC Learning credit available (if registered). You provided great suggestions for process and procedure improvements during the interactive portions of the sessions.

Over 500 attendees visited the information tables and attended the travel and entertainment training events including My Travel, MyEvents and Booking Travel. The teams were overwhelmed by the enthusiasm and support and plan to offer training days in the future that will allow for you to visit a central location on campus and attend your choice of topic(s). Many of you also participated in the follow-up survey sent out to participants and all of your suggestions to improve this event will be considered. We thank you for your positive thoughts and comments.

-Faye McCullough

BFSupport: We’re here to serve you!

Business & Financial Services is continually seeking ways to improve the support and services that we offer to our customers. Our new tool, BFSupport, launched in June and has been gaining momentum across campus. As we continue to improve our customer service, Travel & Entertainment will be phasing out the travel@ucsd.edu email address. Starting in November, BFSupport will be the primary method of contact for the Travel Team and other BFS divisions, and the following emails will no longer be available for UC San Diego customers:

- travel@ucsd.edu
- disbursements@ucsd.edu
- mphelp@ucsd.edu

If you are not doing so already, we encourage you to start contacting us directly through BFSupport (https://BFSupport.ucsd.edu)!
Just the Ticket

Before booking your flight, know your options

The cost of the lowest available coach or economy airfare can be reimbursed for an official business trip. The option to upgrade exists, but if you seek reimbursement you must indicate which published exception applies. Include a note in your MyTravel claim, and if it’s due to a medical reason or disability attach your physician’s certification (dated within the past 12 months). If no published exception applies, an upgrade or extra service is generally ineligible for reimbursement. See allowable exceptions and if unsure contact our team for advice at BFSupport.

MyEvents – Celebrating Event Type

Special and Social Event

We are fast approaching the holiday season! When requesting payments for holiday gatherings please use “Celebrating” as the event nature for these expenses. Be sure to follow Procurement and Contracts policy on how to engage a caterer or venue.

For gatherings not limited to employees (attendees include employee’s spouse, partner, or other invited guests), typically there is no bona fide UCSD business purpose served by the non-employee’s attendance. Unless the non-employee guest is a donor, each employee should pay his/her guest’s portion – which is common practice. Check out our published guidelines.

So, what is FareGenius?

FareGenius is a feature that scouts Connexxus bookings (made via Balboa Travel) for a drop in fare cost; if a lower fare is found the ticket is reissued to the traveler at the lower price. Eligibility is from the date of purchase through departure date, applicable to business or personal travel and requires no action on the part of the travel. Since the launch of FareGenius on July 1, 2013 UC employees have benefited from the following savings:

<table>
<thead>
<tr>
<th>July 2013</th>
<th>August 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original ticket</td>
<td>Original ticket</td>
</tr>
<tr>
<td>New fare</td>
<td>New fare</td>
</tr>
<tr>
<td>$561.97</td>
<td>$464.36</td>
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<td>$243.20</td>
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<td>$1,336.40</td>
</tr>
<tr>
<td>$534.80</td>
<td>$453.00</td>
</tr>
<tr>
<td>Total Savings</td>
<td>Total Savings</td>
</tr>
<tr>
<td>$552.12</td>
<td></td>
</tr>
</tbody>
</table>
Travel Card Payments

Reminder to Travel Card holders: Your December payment due date falls in the middle of the holiday closure. Please plan ahead. Avoid complications with your account during the break as well as the post-holiday reimbursement rush by paying your balance in early December.

If paying your balance via reimbursement claim for Nov/Dec charges, the following must be completed before December 9th:

- **MyTravel claims** expenses claimed, certified, final approval
- **Travel Card prepayments** submitted by preparer and approved by cardholder’s department
- **Paper Entertainment vouchers** received by Travel
- **Travel Card** reimbursement claims or prepayments submitted after the deadline may not post in time.

Make a **phone or online payment** for any outstanding balance that remains after these deadlines. You may then claim reimbursement to yourself instead of your card when our office reopens in the New Year.

**By phone:** 800.344.5696 and follow the ‘telepay’ prompts. If paying by phone for the first time, register your account (hit the star key to speak with a customer service representative to register).

**Online:** Log on to US Bank’s Access Online [https://access.usbank.com](https://access.usbank.com). Select Account Information and click **Cardholder Account Statement** to review your charges and account balance. Then choose Pay Electronically. A new window will open to allow you to complete your payment. The first time you access your account, you will need to register:

1. Go to [https://access.usbank.com](https://access.usbank.com).
2. Click **Register Online**.
3. Enter **UofCA** for company short name.
4. Type your 16-digit account number in the **Account Number** field.
5. Select the month and year that your account expires.
6. Type your account billing address ZIP code.
7. Click **Register This Account**.
8. Click **I Accept** for the licensing agreement, if you agree.
9. Create your **User ID** (7-12 characters alpha and/or numeric, and must be unique).
10. Create your **Password** (8-20 characters, with at least one alpha and one numeric character).
11. Complete **User Verification**, which authenticates your account if you forget your user ID or password.
12. Complete contact information details.
Approval process reminders for MyEvents and MyTravel

Please remember that policy requires that final approvers for travel and meetings & entertainment should be by an employee who does not report directly or indirectly to the traveler, payee, or host. You may find more on this process through the Expenditure Accountability Checklist, Approving Travel Reimbursements and Approving Meetings and Entertainment.

Important dates to remember for processing 2013 travel and entertainment claims

The following are important dates for various transactions leading up to and during the University's holiday break (Dec. 21, 2013 – Jan. 1, 2014). In addition, the offices are undergoing slight construction improvements that may require staff to be temporarily relocated.

Because of this relocation and office closure, the final 2013 disbursement (checks and direct deposits) will be on Dec. 20 with the first 2014 disbursement being issued and mailed on Jan. 3, 2014. To include payments in 2013 business, Travel must receive the following items by Dec. 9, 2013:

- Meetings, entertainment, and programmatic activities (using MyEvents)
- Travel, or mileage (using MyTravel)
- Paper forms