MyTravel – Preparer Tips

BUSINESS PURPOSE

- Why did traveler attend meeting/conference? Examples: Professional development/learning —
 to network with peers to present [as a subject matter expert] donor cultivation
- If travel was to a conference, upload the conference web page with org name, dates & location
 including the URL for a conference web page is not sufficient [see following page for examples]
- If travel was for a program or meeting, please describe what was discussed or agenda topics and upload the meeting/program agenda (if available)
- Please spell out acronyms!

AIR

- Be sure to substantiate baggage fees and/or include explanatory notes (e.g., "lost receipt")
- Early-bird fees must be justified personal convenience is not appropriate justification

GROUND

Explain business need for rental car if not obvious (e.g., meetings away from conference site)

HOTEL

- Receipts/folios should list the traveler's name
- Separate any fees for Internet access, parking and/or meals from hotel room/tax charges
- If the room rate changed during the traveler's stay (e.g., higher weekend rate), please enter the correct amount for each night – do not divide the total by the number of nights

MEALS & INCIDENTAL EXPENSES

- Cash tips are included in the \$71/day maximum do not separate under "Other"
- If a conference/program included meal(s), the M&IE claim should total < \$71 for that day
- Per EVCAA policy, alcohol is not a reimbursable travel expense if itemized meal receipt is not
 available, include traveler statement certifying that alcohol was not included in the charge
- Meals are not reimbursable for same-day trips nor for local conferences (local=40 miles or less)
- UCSD employees traveling together must claim meals separately (unless set up as group travel)
- Entertainment (hosting meals with others, e.g.) while traveling must be claimed in MyEvents

PER DIEM

- Actual charges should be claimed
- Be sure to include currency conversions for the date(s) expenses were incurred

REGISTRATION FEES

Be sure to arrange for pre-payment of Travel Card to avoid US Bank "Past Due" email notices

MYTRAVEL NOTES – GENERAL

- If a traveler had a complicated itinerary or unusual travel circumstances, please explain in detail

 someone unfamiliar with the trip should be able to follow and understand what happened to incur each of the charges being claimed for reimbursement
- Charges > \$75 require an itemized receipt if unavailable, please indicate why (e.g., traveler lost
 it) and explain efforts to obtain duplicate copies
- Credit card statements showing the charge may be substituted for unavailable receipts with personal information redacted

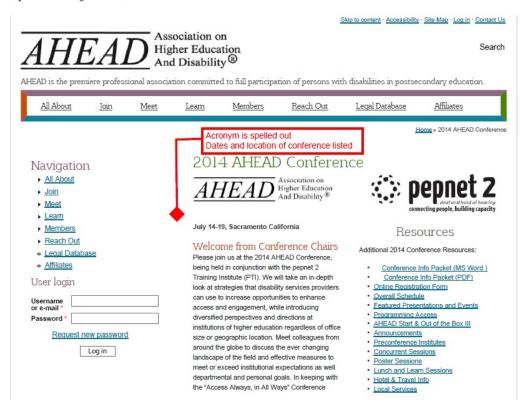
SECURING PERSONAL INFORMATION

Be sure to redact (remove) all personal information from trip att	cachments/documentation, including:
☐ Home address	Credit card numbers	☐ Rirth dates/place

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☐ Personal phone/email	Social security number	Medical conditions

Conference Web Page – Examples of Attachments

http://www.ahead.org/meet/conferences/2014



http://www.hacu.net/hacu/Annual_Conference1.asp





CONFERENCE OBJECTIVES

HACU's Annual Conference provides a unique forum for the sharing of information and ideas for the best and most promising practices in the education of Hispanics. The conference goals are to:

showcase successful, effective, and exemplary programs and initiatives of HACU member institutions promote and expand partnerships and strategic alliances for

promote and expand partnerships and strategic alliances for collaboration between HACU member institutions and publicand private-sector organizations

foster and identify graduate education opportunities for Hispanic students and graduates

leliberate policy issues affecting the education opportunities

of Hispanics, including HACU's legislative agenda

- promote greater Hispanic participation in scholarships, fellowships, internships and other such programs funded by private and government organizations
- discuss emerging trends in higher education affecting Hispanics and HSIs, e.g., distance learning, student-centered learning, outcomes assessment, and cross-national accreditation
- To register click <u>here</u>