
Business Expense Reimbursement Policy

PURPOSE

The purpose of this policy is to provide a mechanism for the accurate and complete documentation and reimbursement of business expenses.

POLICY

It is the policy of the Faculty Practice Group (FPG) to reimburse colleagues and external entities for necessary and approved business expenses incurred in connection with employees' duties, candidate interview, and other external expenditures as requested on behalf of FPG.

GUIDELINES

1. Common examples of employee business expenses that may be reimbursed include, but are not limited to:
 - a. Seminars – tuition, fees, and other charges for continuing medical or other professional education and practice related course work.
 - b. Travel – expenses such as transportation, parking, tolls, and lodging incurred during travel for business purposes. See further information in FPG Travel Expense Policy.
 - c. Meals and entertainment – meal expense incurred in connection with business travel, and entertainment expense in connection with a specific business purpose. Entertainment expense not related to a business purpose will not be paid.
 - d. Office expenses – costs incurred in relation to project completion or unusual supply requirements. Note, however, that office supplies should be routinely ordered using the purchasing process.
2. Expenses in connection with a spouse and family members who accompany an employed colleague are nearly always a personal cost; therefore expenses of family members identified as personal will not be reimbursed and should be paid directly by the colleague.
3. Employee business expenses must be documented and submitted within 21 calendar days of incurring the expense. Requests received more than 60 days after the expense was incurred will be considered on a case-by-case basis. If submissions are made after 60 days, the amount of the business expenses may be imputed as income to the employee on the employee's W-2 unless there is a reasonable justification for the late submission. In all cases, if the submission is made more than 6 months after the end of the trip or event, income will be imputed on the employee's W-2.
4. Complete the Business Expense Form or Check Request Form and attach **original, itemized** receipts (not copies) and other necessary documentation to the expense report.

5. Sign and date the form and obtain the appropriate approvals based on the total amount of the expense report.
6. Review the form for completeness and appropriate approvals. Incomplete or improperly approved expense requests shall be returned for correction. This will result in processing and payment delays.
7. Colleagues are encouraged to retain a copy of the form and receipts for their records.
8. Submit the completed form to the FPG Finance Department for payment.

FORMS

Business Expense Form
Check Request Form

REFERENCES

University of California Policy Business and Finance Bulletin (BFB) G-28 - Travel Regulations
University of California Policy BUS-79 Expenditures for Business Meetings, Entertainment, and Other Occasions

POLICY OWNER

Human Resources Manager, Faculty Practice Group

APPROVAL

Jody Gaspar, Director of Business Operations

REVISION HISTORY

Effective Date: July 1, 2014

Review Date:

Revise Date:



Faculty Practice Group

BUSINESS EXPENSE FORM

Name: _____ Date: _____
 Employee ID: _____ Cost Center: _____
 Approver Name: _____

Supporting Documentation (original itemized receipts, invoices) must be attached.

Date	Location of Event	Type of Expense (Meeting Lunch, Other)	Type of Event	# of Participants	Purpose of Event/Meeting	Expense Amount
Total to be Reimbursed:						

Participant Names (add additional lines as needed):

Requesting Signature: _____
 Approver Signature: _____



Check Request Form

ORDER NUMBER (P.O.)		
FS DEPT	CLASS	SEQ. NO.

AGREEMENT NUMBER		

NAME OF PERSON TO CONTACT	DEPT. NAME	TELEPHONE	DATE

LOC	ACCOUNT	CC	FUND	PROJECT	SUB	OBJECT CODE	SOURCE	AMOUNT

V E N D O R	P A Y E E	

TEL #	
FAX #	
FED. TAX ID or SOCIAL SECURITY #	

IS PAYEE A UC EMPLOYEE?
 YES NO

CALIFORNIA RESIDENT?
 YES NO

DELIVER/SHIP TO ADDRESS:

BILL TO ADDRESS:
 UCLA ACCOUNTS PAYABLE
 10920 WILSHIRE BOULEVARD, 5TH FLOOR
 LOS ANGELES, CA 90024-6502
 TEL: 310/794-0197

Section 1:

QUANTITY	UNIT	CATALOG NO./DESCRIPTION	UNIT PRICE	EXTENDED PRICE
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
				0.00
			ESTIMATED FREIGHT CHARGE	
			TOTAL	0.00

Section 2: Justification/Pre-Payment (Not to be used in lieu of a vendor invoice):

TOTAL	0.00
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 AUTHORIZED NAME (print) SIGNATURE & PHONE

CALIFORNIA SALES/USE TAX: NO YES

TAX EXEMPT (IF APPLICABLE): YES