

Purpose:

The purpose of this standard operating procedure is to provide guidance on how to process travel requests for faculty.

Travel Guidance:

- I. Prior to the purchase of any airfare a travel itinerary is required.
- II. Administrative support staff should contact the Surgery PAC office with any questions or special requests.

Pre-Travel Booking Process:

- I. Travel Itinerary Process:**
 - a. Administrative support staff will complete the travel itinerary request.
 - b. Travel itinerary request can be done in one of three ways:
 - i. Phone - (800) 235-8252
 - ii. Email - Travel@finance.ucla.edu
 - iii. Express Portal - <https://us2.concursolutions.com/home.asp>
- II. Ticketing Process:**
 - a. Request UCLA Travel Center send approved itinerary to the PAC inbox (pac@mednet.ucla.edu).
 - b. Provide following details to PAC:
 - i. Meeting name
 - ii. FAU to charge
 - c. PAC initiates ticket payment and chooses appropriate financial approver based on FAU provided.
 - d. Authorized ticket payment routes back to UCLA Travel Center.
 - e. UCLA Travel Center issues paid ticket itinerary (notifying PAC, initial requestor and traveler via email).
- III. Conference/Meeting Registration**
 - a. Conference/meeting registration can be done one of two ways:
 - i. Registration and payment completed administrative support staff on behalf of faculty, with reimbursement processed later.
 - ii. Arrange to have PAC register and pay on behalf of faculty using the Pcard (see Pcard process under [Non-Travel Reimbursement & Purchasing Procedure](#)).
- IV. Hotel Reservations**
 - a. Administrative support staff can book hotel on behalf of faculty.
 - b. A credit card and personal information are required to complete hotel reservation.

- c. For hotels that are offering a conference rate, the traveler needs to book directly using the link provided by conference host. The UCLA Travel Center does not direct bill conference rate hotels.

Post-Travel Process:

- I. Upon completion of travel/conference, administrative support staff will complete the [Travel Worksheet](#).
- II. Refer to the [Purchasing and Travel Policies.pdf](#) for Travel and Entertainment limits
- III. Submit the following documents to PAC
 - a. Travel Worksheet – Completed and signed by all parties
 - b. All receipts (i.e. airfare, conference registration, hotel, transportation, food, etc)
 - c. Copy of bank or credit card statements with all applicable transactions highlighted
 - d. FAU
- IV. Delegation:
 - a. Confirm that faculty have updated their user profile within Concur/Express Portal.
 - b. Please have faculty designate **Caroline Wallace and Ashley Banuelos** to proxy on their behalf by following these steps...
 - i. Updating Your Profile (add/remove delegates) –
 - ii. <https://ucla.app.box.com/file/775756134592?s=vn5m1gl0sydmylltmo3tt8ve7s26okwf>
 - iii. <https://travel.ucla.edu>

Processing Timelines:

- I. Please allow for the following timelines to process requests:
 - a. Department Timelines
 - i. Pre-Travel Requests (e.g., airfare, registration): Two (2) business days
 - ii. Post-Travel Reimbursements: Five (5) business days upon receipt of invoices
 - b. Central Campus Timelines
 - i. Pre-Travel: Within 24 hours
 - ii. Post-Travel: 4-6 weeks
- II. PAC office will notify requestor once request is submitted to Central Campus.
- III. Upon submission to Central Campus, processing timelines are an estimate and outside of department control.
- IV. Please note: The university is closely monitoring expenses and strict adherence to UCOP policies. Any purchase that does not follow the process may be subject to non-payment.

Resources:

- I. UCLA Travel Center – <https://travel.ucla.edu/>
- II. Express Portal – <https://us2.concursolutions.com/home.asp>
- III. [TRAVEL WORKSHEET Reimbursement Template.pdf](#)
- IV. [Purchasing and Travel Policies.pdf](#)

Contacts:

- I. Purchase and Accounting – pac@mednet.ucla.edu