

NEWS/UPDATES (October 17, 2022):

Implementation of UC Berkeley's Business Air Travel Carbon Mitigation Program:

- The Business Air Travel Mitigation Program assigns a fee to UC Berkeley business air travel trips (\$10 per domestic round trip and \$25 per international round trip). The fee will help to mitigate the environmental impacts associated with our business air travel by supporting campus projects that reduce our carbon footprint.
- See: <https://sustainability.berkeley.edu/office-sustainability/air-travel-mitigation-program>.
 - The assessment will begin in October 2022 when the travel report is submitted.
 - The fee is only assessed to business-related trips funded by UC-managed dollars.
 - The fee is assessed to the chartstring that the air travel was booked with.
 - A trip may represent a number of legs/stops, but the fee is only assessed once for a trip.

NEWS/UPDATES (September 20, 2022):

Enforcement of policies for reimbursement of cell phone and/or home internet usage:

- Effective IMMEDIATELY, any new requests for reimbursement of cell phone and/or home internet usage will be rejected without 1) a clear business reason and 2) the appropriate supporting documentation (i.e. invoices/receipts).
- See: <https://policy.ucop.edu/doc/3420357/BFB-G-46>.
 - Reimbursement of home internet and/or cell phone monthly expenses is a violation of existing policies.
 - An employee may request reimbursement for the business use of a cellular phone or similar device purchased with the employee's own funds ONLY if the individual incurs additional charges on a calling plan for business calls over the plan limit. In such cases, the University will reimburse those charges at the excess minute rate, upon receipt of supporting documentation. No reimbursement shall be made for business calls or a percentage of total business calls made within the package minutes covered under the employee's calling plan contract.
 - The university will NOT reimburse the procurement of cellular equipment purchased with personal funds.
 - Visit IT's [Cellular \(Wireless\) Phones](#) webpage for information on how to obtain a university provided cellular phone.

NEWS/UPDATES (September 7, 2022):

Delay in processing time for new vendors:

- New vendors are taking over a month to be processed and approved by campus Vending.
- Vending's response to questions and inquiries (including rush requests) is similarly delayed and very inconsistent. Oftentimes there is NO response from Vending.
 - All individuals/companies MUST be vendored in order to receive a payment from the university.
 - This includes payment for services rendered, honoraria and reimbursements (i.e. travel).
 - Vendors are processed through a self-serve web application.
 - Requests are reviewed by Vending on a first in, first out basis.

- To set up a new vendor, please email holly@berkeley.edu the vendor's name and email address.
 - The vendor will receive an invitation to register as a vendor.
 - The vendor must then complete the online registration. Note: incomplete registrations, including no uploaded voided check for direct deposit set up, will result in additional delays.
- Email holly@berkeley.edu if you would like to know if an individual/company is already vendored.
 - Vending updates (including change in address, direct deposit, etc.) are now made online through a [docuform](#) on Vending's website.

Enforcement of policies for purchase and reimbursement of software and services:

- Purchases of software and all professional services (editing, transcription, etc.) should always be made in advance through a purchase order request.
- Employees should NOT purchase software or professional services for UC Berkeley-related business purposes using a personal credit card. This is a violation of UC policy.
 - Any reimbursements for software or professional services over \$150 will require a new form.
 - [Software or Services Reimbursement Request Form](#).
 - Note: reimbursement requests will be routed for additional review and, in some cases, may not be approved.
- Purchases of Cloud Services and Software as a Service (SaaS) are special considerations.
 - The purchase of any software that stores or shares restricted or sensitive data may require additional information, supporting documents, and/or longer lead times for Supply Chain Management to review.
 - See [Purchasing Software and/or Cloud Services](#).

NEWS/UPDATES (November 9, 2021):

IMPORTANT TRAVEL POLICY UPDATE:

- *The requirement to book airfare through ConnexUC is not currently being enforced while administration gathers feedback from campus.*

NEWS/UPDATES (October 1, 2021):

IMPORTANT TRAVEL POLICY UPDATE:

- ~~Effective November 1, all business-related airfare must be booked through [ConnexUC](#).~~
 - ~~Booking through ConnexUC means travelers will automatically get travel insurance, ticket protection, and agent support for their trip.~~
 - ~~Fees will be incurred for booking through ConnexUC.~~
 - ~~Details and FAQ can be found here: <https://travel.berkeley.edu/faq-page>~~
- ~~Employee travelers will also need to use the [Direct Bill](#) system to charge airfare directly to the University.~~
 - ~~Please submit [Airfare Direct Bill ID Request form](#) to get the Direct Bill ID from Holly.~~

NEWS/UPDATES (June 30, 2021):

Reimbursement/Travel/Entertainment Certification:

- Employees are strongly encouraged to certify their reimbursement, entertainment, and travel reimbursement requests through the campus Reimbursement System.
 - Please continue to submit signed department forms and receipts to Holly.
 - When the request is entered, you will receive a system-generated email link to complete the certification process in reimburse.berkeley.edu.
 - Click through and review the pages of the request; then approve/certify on the last page.
- Students and visitors do not have access to the Reimbursement System.
 - Please continue to submit signed department forms and receipts to Holly.
 - Holly will verify funding and forward to Tamar for processing.
 - Tamar will contact the student/visitor to obtain certification, if needed.

Travel and Entertainment 45-day Submission Deadline:

- All travel and/or entertainment reimbursement requests must be submitted no later than 45 days after the completion of travel or the date of the event per UCOP policy [G-28](#).
 - This is NOT a new policy; however, the existing policy has not been strictly enforced.
 - As of July 1, 2021, campus will begin strictly enforcing this policy and any exceptions will be treated as taxable income, which would result in the employees being subject to withholding on those reimbursements.
 - In order to allow for sufficient time for processing, please submit travel and entertainment requests to Holly no later than 30 days after the completion of travel or the date of the event.

Professional services must be contracted on a purchase order BEFORE any services are provided:

- Invoices will NOT be paid if a PO was not created before the work was performed.
- Reimbursements for professional services will NOT be paid.
 - Professional services include academic editing, transcription, and repair services.
 - Vendor contracts CANNOT be signed off by departments. They must be reviewed and signed by Supply Chain Management.

Professional service providers must provide a certificate of insurance:

- A certificate of insurance must be on file before providing the service(s) to the University per UCOP policy [BFB-BUS-63](#).
 - This is NOT a new policy; however, the existing policy has not been strictly enforced.
 - Risk Services is the ONLY entity that can approve a waiver of insurance.
 - Waiver approval is NOT guaranteed.
 - The waiver must be granted before any service(s) can be performed.
 - Risk Services is currently taking 2-4 weeks to approve a waiver request.
- For low value (under \$4,999) copy editing, assistance to a disabled individual or translating presentations in real time, insurance requirements MAY be waived if certain conditions are met.
 - If Risk Services approves the waiver, the supplier will need to sign an indemnification statement.

Gift Card Policies:

- All gift cards MUST be handed out in strict compliance with policies [BFB-G-41](#) (Gifts to Faculty and Staff) and [BFB-G-42](#) (Gifts to Non-Employees).
 - In instances where a gift is appropriate and allowable under policy, specific store-branded cards (such as Target, Amazon, and similar) can be purchased.
 - In all instances, documentation of gift card purchases must contain ADVANCE written authorization to purchase the cards, with specific quantities and amounts, and a list of recipients.
- What is NOT allowed:
 - Generic gift cards (Visa, Mastercard, etc.) that can be used at any vendor are not allowed under any circumstances.
 - Any card allowing 'cash back' or for the balance to be transferred to an online account is not allowed.
 - Cards intended to fund online/app spending accounts (PayPal, Venmo, etc.) are not allowed.
 - Food delivery related gift cards (Doordash, Grubhub, Uber Eats, etc.) intended to provide meals at a virtual entertainment event are not allowed under any circumstances.
- These policies do NOT apply to human subject payments which are subject to different [guidelines](#).

Travel:

- Review UC Berkeley's guidance on travel BEFORE you travel or make travel plans during the COVID-19 pandemic--particularly for international travel.
 - <https://coronavirus.berkeley.edu/travel/>

Upwork:

- The University is unable to use Upwork for any services.
 - Upwork's general terms violate the Regents' standing order for indemnification.
 - We cannot create a purchase order for Upwork.
 - Requests for reimbursements for payment to Upwork will not be processed.

NEWS/UPDATES (January 19, 2021):**Entertainment update:**

- Entertainment/events are NOT currently permitted under the Bay Area shelter-in place orders.
 - Virtual meetings and virtual entertainment events are NOT reimbursable/payable.
 - <https://www.cityofberkeley.info/covid19-health-orders/>
 - Latest campus communication: <https://coronavirus.berkeley.edu/events/>

Travel update:

- Non-essential university-related travel is strongly discouraged during current public health crisis.
 - Educational conferences or delegation visits are NOT considered essential travel.
 - Campus guidelines: <https://coronavirus.berkeley.edu/travel/>

- Non-essential university-related INTERNATIONAL travel should be avoided until further notice.
 - Essential university-related international travel must follow the campus International Travel Protocol to request approval PRIOR to travel.
 - <https://globalengagement.berkeley.edu/global-travel/international-travel-protocol-essential-travel>

Reimbursement update:

- Guidelines issued for reimbursable expenses for remote work during shelter-in-place. ([pdf](#))
- All reimbursement requests must now include a signed reimbursement form.
 - Fillable pdf forms will not save the filled in data or signature from "preview." Forms must be downloaded.
 - Electronic and digital signatures must be certified. You cannot just type in your name.
 - When in a pdf form, click on the signature icon to electronically sign the form.
 - You can also print the form, sign (wet signature), and scan or take picture of the signed form.

Purchasing update:

- Professional services must be requested on a purchase order BEFORE any services are provided.
 - Professional services include academic editing, transcription, and repair services.
 - Invoices will NOT be paid if a purchase order was not created before the work was performed.
 - Reimbursements for professional services will NOT be paid.
 - Vendor contracts CANNOT be signed off by departments. They must be reviewed and signed by Supply Chain Management.