



MyExpense Tips & Best Practices

1. When submitting a travel reimbursement, don't forget to **attach the meeting agenda**, flyer, invitation, etc. as verification of the meeting.
2. Make sure that the "Transaction date" field matches the date on the receipt (i.e. the date the credit card was charged for the purchase)
3. If submitting a personal credit card statement to back up a charge, make sure to **remove/redact any personal information** such as account #, SSN#, balance, etc. A credit card statement is not considered a receipt, so a Declaration of Missing Receipt form is also needed.
4. When claiming mileage, **use the Mileage calculator in MyExpense**. Simply input the To/From address and it will automatically calculate the number of miles @ current mileage reimbursement rate.
5. Only include/attach receipts being reimbursed for and put them in order by date.
6. Always request **itemized receipts** showing the **method of payment** (this is especially important for grants).
7. A Declaration of Missing Receipt form needs to be filled out for missing, lost, non-itemized receipts.
8. **Do not use gift cards** to make purchases as this is not a valid payment type for reimbursement.
9. To claim Travel expenses such as lodging, meals and incidentals, transportation charges, etc. you must be at least forty miles from your headquarter location or home, whichever is closer.
10. Regarding the Business Purpose of a trip, "business travel", "conference", or "attending conference" are not acceptable purposes. Instead, the purpose should be something along the following lines: "Dr. Johnson attended the Society of Neurological Surgeons held in San Francisco on 4/14-4/16 to present on the effects of traumatic brain injury". Be sure to describe the trip taken, the need/role (presenter, continuing education, service, etc.) and how it benefits the University.
11. When entering expense reports, think from an auditor's point of view. Make sure everything is transparent and that no background information is needed. Please also use complete sentences and spell out acronyms.
12. You can do a bulk receipt upload by going to the Receipts tab → Attached receipt images and upload receipts.
13. When requesting Travel Advances, please include dates, location and purpose of trip along with the funding source and a brief budget for advance. Cash advances must be cleared with a MyExpense expense report within 60 days of the end of a trip.
14. If you have any questions as to whether something is reimbursable or not, please check with your Business Operations Analyst prior to making a purchase/taking a trip.

Here are some helpful websites that we reference when reviewing reimbursement requests:

BUS-79: Expenditures for Business Meetings, Entertainment:

<http://policy.ucop.edu/doc/3420364/BFB-BUS-79>

G-28: Policy Governing Travel: <http://policy.ucop.edu/doc/3420365/BFB-G-28>

