Travel How To

In general, you can find campus travel policies and information [here](). For the College of Engineering, all travel paperwork, including uploading receipts and back-up documentation is being processed in the OPP system ([prepurchasing.ucdavis.edu]()). This is the system you've all used for order requests. You will log into the system just like you would when you submit an order request, except you select the "Travel/Entertainment" Business Purpose> Request Type.

There is lots of information on the [College Intranet site]() (you'll need to login with your kerberos). Travel specific FAQ's can be found [here](). *(If you can't see the information, you likely need to log in with your kerberos.)*

Don't forget to register your trip PRIOR to traveling if you did not book your flight through the Connexus Travel system. To register your travel (*anything outside of California*) [click here]() to find the UCAway registration link.

In a nutshell, the following is what you'll need to do to get reimbursed:

How do I get reimbursed for travel expenses?

1. [Fill out a Travel Reimbursement Form]() with actual expenses incurred from trip
2. Collect itemized paid receipts for all expenses
3. Enter the request for reimbursement in Prepurchasing System (OPP) [https://prepurchasing.ucdavis.edu]()
4. Refer to this link on how to enter in OPP [https://ucdavis.box.com/s/s7f6e60us2ztivue55s7z5uqwdm8dy1w]()
5. Upload the travel form and itemized paid receipts
6. PI & Account Manager will review & approve the request and will route to Shared Services Purch & AP for processing
7. Once Shared Services Purch & AP initiates the reimbursement in the AggieExpense system, the requestor will receive an e-mail requesting them to log into AggieExpense and review the reimbursement then click 'submit' for further review and approval for payment.

All documentation that you would have normally provided in paper or email form, is now uploaded into the OPP system ([prepurchasing.ucdavis.edu]()).

A reminder that all travel expenses (whether for in-person or virtual meetings/conferences) must be entered and submitted in AggieExpense within 60-days of the end of your trip to avoid paying imputed income taxes on the cost of the trip. To avoid being taxed, **submit your receipts in OPP ([prepurchasing.educdavis.edu]()) within 30-45 days of your trip end** so that

Shared Service Purchasing has an opportunity to enter your travel expenses into the AggieTravel system before the 60 days. To avoid any delays, be sure you include all back-up documentation and provide all the necessary information in your OPP document before you submit it for reimbursement. The 60-day clock stops when you submit your trip in _AggieExpense_ (not in OPP).

A reminder you also need to set up 'delegates' in AggieExpense so that the Shared Service Purchasing staff can process your travel paperwork.

How do I add a delegate on AggieExpense?

Step 1: Go to aggieexpense.ucdavis.edu to login to AggieExpense with your Kerberos ID and password
Step 2: Click on the 'Profile' link on the top right of your screen
Step 3: Select 'Profile Settings'
Step 4: On the left side of your screen, under 'Request Settings', click 'Request Delegates'
Step 5: Click the 'Add' button
Step 6: In the search bar, enter email address (see list below) and click the 'Add' button to the right to add 'name of person'
Step 7: Check the boxes for 'Can Prepare, & 'Can view receipts'
REPEAT Steps 5-7 to add the rest of the Shared Services processors and CS Account Managers listed below:

Flory, Pia paflory@ucdavis.edu

Cerna, Irma imcerna@ucdavis.edu

Andrade, Norma nandrade@ucdavis.edu

Kessler, Jill jmkessler@ucdavis.edu

Valenzuela, Marcie mmvalenzuela@ucdavis.edu

Clague, Melanie mclague@ucdavis.edu

Isabelle Soukphaly isoukphaly@ucdavis.edu

Don't forget to 'SAVE' before you exit the screen.