

Business Office

Quarterly Updates



Reminders:

If you had a travel advance a post travel **must** be completed even if no other expenses will be claimed.

Post Travel claim needs to be submitted within 21 days of the end of trip

Conference Travel:

Please attach a conference agenda to post travel to substantiate the business need for this trip and to show that the conference topic is related to the extramural fund if charged to contracts and grants

Travel:

The reimbursement rate for the use of a private automobile for University business travel will be reimbursed at 50 cents a mile for travel incurred on or after January 1, 2010.

To ensure that you have the most updated post travel form please download it at: http://financial.ucsc.edu/Pages/Travel_Main.aspx.

Non-Conference Travel. **Purpose of travel.** Please provide sufficient information in case of an audit to readily identify the trip as a direct benefit to the sponsored project or research and that the cost incurred is solely to advance the work under the sponsored agreement or your research.

Out of pocket expenses: UC Accounting Manual has been revised to address reimbursements to University employees for the purchase of goods and services. It discourages reimbursement of out-of-pocket purchases of goods (e.g., departmental supplies, etc.) noting that other options are available for making such purchases, such as the Procard and CruzBuy. It specifically prohibits reimbursement for out-of-pocket payments made to third parties for services, except for expenses incurred in connection with business travel and entertainment.

For more information on acceptable methods for buying goods and services please go to <http://purchasing.ucsc.edu/howto/index.html>

Equipment and Supply orders in the last months of an extramural award.

There is not a specific federal rule that absolutely forbids equipment or large supply purchases in the last months of an extramural award.

There are, however, certain guidelines that we must follow to ensure that such costs are allowable and allocable to an award. Under FDP, an institution may directly charge a grant for general or special purpose equipment, but only if the equipment is primarily used in the actual conduct of the research.

Generally, what is required for approval of such an expense is a justification by the PI as to the reason why charging the grant for the equipment or supplies at the end of this project would have been:

- 1) a necessary expense at this time for forwarding the project to completion
- 2) a reasonable charge based on a proportionate benefit provided to the grant.

It is the PI's responsibility to provide such justifications when the benefit of an expense to the grant is not readily apparent, as in this case.

