**ARRANGING FOR UCSB GUEST TO BOOK OWN TRAVEL**

1. **Create a Trip ID for Direct Bill Authorization**

* Go to the UCSB Travel Application at [https://travel.ets.ucsb.edu](https://travel.ets.ucsb.edu/).
* Select your department-Direct Bill Authorization Number.
* Select Direct Bill.
* Complete Traveler Information for guest, making sure to enter the correct account number that you want charged for the ticket. It must be an active account and cannot be changed later.
* In Create Voucher field, select Create Trip ID, which will generate a voucher consisting of the traveler’s first four letters of last name and 5 numbers.

*Note:* Lodging is booked separately by the department, working directly with the hotel. For convenience, best practice is to use hotels that will direct-bill the department. For more info, see: <https://travel.ucop.edu/connexxus/why-connexxus/lodging>

1. **Inform the traveler**

* Provide the traveler with their Direct Bill ID and the contact information for full service agents at either BCD Travel ((877) 885-8632, or UC Travel Center (800) 235-8252.
* Send an email authorization to BCD Travel ([uc.authorizations@bcdtravel.com](mailto:uc.authorizations@bcdtravel.com)) or UC Travel Center ([travel@finance.ucla.edu](mailto:travel@finance.ucla.edu)) with the subject line “UCSB Arranger Authorization for Guest [Last Name/First Name].
* The body of the email should include the traveler’s name as shown on their travel ID, and the Direct Bill ID. If someone other than the traveler will be calling the agent to book the reservation, that person’s name should also be included in the email.
* If there are any dollar or date restrictions or if you want to pre-approve the fare prior to ticketing, please also include that information in the email.
* When the guest traveler contacts the agent, they will need to provide the authorizing arranger’s name and the Direct Bill ID.
* The agent will confirm this information via the authorizing email, and book the trip to the UCSB direct-bill account. The authorizing arranger will be copied on the e-invoice.
* The traveler will be sent e-tickets to their email address, and the traveler will automatically receive travel insurance.
* Until travel is completed, this trip will remain in the arranger’s Travel Application/WebTEV In-Basket as “new.”

1. **After the trip has concluded, finalize the details in the UCSB Travel Application’s Travel Expense Voucher**

* Traveler completes the Domestic Travel Worksheet <https://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/docs/travel/Domestic%20Travel%20Reimbursement%20Worksheet.pdf>



OR the Foreign Travel Worksheet. <https://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/forms/travel-foreign-travel-reimbursement-worksheet.pdf>

* Traveler signs the worksheet, attaches original receipts, and sends packet to the department for authorized approval signature.
* Preparer goes to the UCSB Travel Application at [https://travel.ets.ucsb.edu](https://travel.ets.ucsb.edu/), selects Out-Basket to view the in-process travel voucher created earlier, and

enters all non-airfare reimbursable expenses incurred by the traveler, such as meals and other travel expenses (taxis, tolls, shuttles, parking, etc.).

* Since the airfare has already been direct billed, do not include that expense under Transportation Expenses or the department will be billed twice. Instead, indicate in the comments section that the airfare was direct-billed.
* Preparer submits voucher for releaser’s approval via Travel Application.
* Department releaser submits the voucher for reimbursement via Travel Application, and forwards the original hard-copy form and original receipts packet to Travel Accounting.

*NOTE:* Original receipts are always required for all lodging and all air transportation. No receipts are required for expenses under $75 in other categories, including meals, taxis, baggage fees, tolls, and parking. Please tape receipts to an 8.5x11” sheet of paper, one side only, before sending to Travel Accounting.

**Top Five Reasons that Reimbursement Requests are Returned**

1. No signature for traveler or for department approver on Domestic/Foreign Travel Worksheet.
2. Account used for travel billing is inactive.
3. Travel rates exceed the maximum found in UC Policy G-28; see section III, V, D (transportation guidelines), section IX, Appendix A (allowed rates for mileage) and B (allowed rates for lodging and meals).

<https://policy.ucop.edu/doc/3420365/BFB-G-28>