

# Karp Lab: Policies Surrounding Expenses, Travel, and Reimbursement

## 1. Overview

No member of the Karp Lab should ever be paying for research expenses out-of-pocket. That said, university policies dictate specific procedures be followed to purchase equipment, supplies, and services as well as request reimbursement for travel and/or travel-related expenses. These procedures differ depending on whether a lab member is a university employee at the time (e.g., a TA, a GSR, or a university postdoctoral scholar) versus being paid via a fellowship (e.g., a graduate group fellowship, university fellowship, or an external fellowship such as the NSF GRFP or NSF postdoctoral fellowship program). The document below seeks to clarify our group's procedures.

## 2. Materials, Supplies, and Equipment

- Materials, supplies, and equipment should be purchased through the UC Davis prepurchasing system (<https://prepurchasing.ucdavis.edu/>).
- Upon entry to the lab, each graduate student and postdoc should request that Danny contact MetroPurchasing ([metropurchasing@ucdavis.edu](mailto:metropurchasing@ucdavis.edu)) to add them to prepurchasing.
- The graduate student or postdoc should then meet with Danny to receive training on how to put in prepurchasing requests.
  - It is important that lab personnel give clear instructions about where to purchase supplies when filling out the prepurchasing form (i.e., include a URL with a specific link and/or attach a pdf showing the items to be purchased).
  - Lab personnel should check with Danny about which account to use.
  - If receiving the supplies is time sensitive, then include a note in the prepurchasing order and choose the correct date in the 'date needed' section.
- Some items are difficult to procure and deliver online (e.g., construction supplies from Home Depot). These items should STILL be entered into the prepurchasing system. The Metro purchasing team can arrange for them to be picked up at a nearby store location.
- If you are traveling, it is permissible to purchase research supplies without using the prepurchasing system. To do so, you can either use your personal finances and then later seek reimbursement OR use a travel card (more on this below).
- Any materials that cost \$500 or more (including tax) will require more rigorous review. As a result, you should never purchase items >\$499 out of pocket and hope to receive reimbursement, even when traveling.
  - If you are traveling and need to make a purchase >\$499, speak with Danny first.
- Both university employees and those on fellowship have access to prepurchasing

## 3. Services

- The university uses a centralized process to approve services (e.g., repair a car, conduct DNA sequencing, pay an independent contractor to conduct point counts, make copies or print posters *etc.*). This process is time-consuming and must be completed before the service is provided.
  - It is thus important to plan ahead if you require a service and initiate a request in the prepurchasing system. You can then work with Danny and the purchasing team to navigate the steps needed to procure the service.
- If you need to procure a service while traveling, contact Danny and the purchasing team to come up with a solution.

## 4. Travel

- Travel-related expenses (e.g., plane tickets, mileage reimbursement, conference registration, accommodation, car rental [but not rentals from fleet services], supplies while traveling, etc.) are subject to university policies and procedures that can be found here: <https://ucdavispolicy.ellucid.com/documents/view/339#>.
  - The website outlines important policies; for example, meal costs must not exceed \$79/person/day for domestic travel (as of when this document was written).
  - Memberships that include a registration in the same receipt can be reimbursed for all travelers. Only employees can be reimbursed for membership costs; therefore, if you are on fellowship, please work directly with a purchaser when buying conference registration/society membership fees.
- Travel card
  - Travel cards are a preferred way to make travel-related purchases as no reimbursement is required and students/postdocs thus do not need to wait lengthy periods for reimbursement to process.
    - Reimbursement is only possible AFTER travel is complete. Thus, if you purchase a plane ticket months in advance, then you would need to wait until after your trip to get reimbursed.
  - University employees can apply for a university travel card here: <https://supplychain.ucdavis.edu/travel-entertainment/travel-card/corporate-liability>
  - The travel card application asks for the departmental chart/account to be assigned to card expenses. Ask Danny for this information. It also requires the first and last name of your department head, please use Christine Crum.
  - All applicants should use their office business address when applying for the card, regardless of whether they are in their office or not at this time.
  - Campus Travel Card applicants will need their Fiscal Officer's User ID in order to complete the application. Please ask Danny to direct you to his account manager.
  - Never use the travel card for anything other than work-related travel expenses!
    - If you put personal expenses on the travel card, then you will need to reimburse the university (which is a lengthy and difficulty process) and could result in negative consequences.
  - If you do not have a travel card, then you will need to purchase travel-related expenses yourself and then seek reimbursement via AggieExpense later
  - Because students and postdocs on fellowship are NOT university employees, they cannot use a travel card when on fellowship.
    - If you are on fellowship, work with Danny to have him use his travel card to purchase your plane tickets or any other ahead-of-travel expenses.
    - If it would be a significant financial hardship for you to incur travel-related expenses and later seek reimbursement (after travel is complete), then discuss requesting a cash advance with Danny.
      - Disclaimer: this process is complicated, especially for non-employees
  - All Travel must be reconciled within 60 days of the end date of the travel using AggieExpense.
- AggieExpense
  - All travel related expenses must be processed through the AggieExpense system: <https://aggieexpense.ucdavis.edu/> even if using a corporate travel card.
  - All new lab members should read this website <https://supplychain.ucdavis.edu/travel-entertainment/aggieexpense> and associated links before traveling for the first time. They should then meet with Danny to go over how to prepare their first travel report.
  - It is important to save photos of all travel-related receipts when traveling. Receipts will need to be associated with each expense (except mileage reimbursement).

- Expenses incurred on travel cards will automatically populate in your Aggie Expense profile (and can then be associated with specific travel reports).
  - It can take a few days for expenses to show up; you should wait to prepare your travel report until they do.
- Only university employees have access to the Aggie Expense (students and postdocs on fellowship do not).
  - Non-employees will need to work with Danny to set up a “UC Davis Non-Employee Application” to request reimbursement for travel related expenses
  - After travel, the student or postdoc must meet with Danny to prepare a travel report and request reimbursement. Danny will submit the report.
- Travel reports need to be submitted within 60 days of travel. Otherwise, reimbursement will be considered taxable income!
- Registering travel
  - All travel out of the state **must** be registered through UC Away (<https://ehs.ucop.edu/away>)
  - If you buy plane tickets through AggieExpense, the process is automatic but it is not if you buy plane tickets yourself (or use your travel card on another website)