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July 15, 2019

CHANCELLORS
MEDICAL CENTER CHIEF EXECUTIVE OFFICERS
LAWRENCE BERKELEY NATIONAL LABORATORY DIRECTOR
VICE PRESIDENT—AGRICULTURE AND NATURAL RESOURCES

Dear Colleagues:

Enclosed is the revised BFB-G-28 Travel Regulations. The revision allows delegation to the Chancellor or other University official to reimburse, in limited circumstances, spouse/domestic partner, dependent-care provider, and dependent travel expense or dependent-care expenses related to employee's or employment candidate's University travel. These changes are reflected in several sections of the policy:

Section III.D, Reimbursement Standards:

Added travel-related and childcare expenses for a spouse, domestic partner, dependent-care provider, and dependents who accompany the employee when pre-approved by the Chancellor or other senior University officer to the list of taxable travel-related expenses that may be reimbursed by the University.

Section IV, Compliance/Responsibilities:

Chancellors may delegate the authority to pre-approve reimbursement of travel expenses of a spouse, domestic partner, dependent-care provider, or dependents of an accompanying parent (employee) or prospective employee.

Section V.B.4 Payment of Expenses on Behalf of Others:

Language is modified to allow reimbursement of expenses paid on behalf of others in limited circumstances as further outlined in Section V.H.2.f, Spouse, domestic partner, dependent, and dependent-care provider travel.

Section V.H.2: Non-University travel modified to include other dependents and dependent-care providers.

Section V.H.2.b.i.: Prospective Employees, Authorization:

Language is added to allow, at the Chancellor's discretion, actual travel expenses and dependent care expenses to be reimbursed for spouses/domestic partners, dependents and dependent-care providers who accompany candidates for faculty or high-level administrative positions on final interviews.

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Section V.H.2.f.: Added dependent and dependent-care provider

Section V.H.2.f.i.: Clarified that reimbursement of expenses as bona fide University business travel purpose by removing “a spouse/domestic partner serving a bona fide University business travel purpose.”

Section V.H.2.f.ii.: Reimbursement of Travel Expenses for a Spouse, Domestic Partner, Dependents, and Dependent-Care Provider is a new section that was added.

Section V.H.2.f. Funding: Clarified the funding restrictions applicable to dependents and dependent-care provider’s expenses and travel reimbursements. Also, clarified spouse, domestic partner, dependent-care provider and dependent travel expenses may not be charged to either federal or state funds.

Section V.H.2.g.: Athletic Travel—Spouse or Domestic Partner and Other Family Members:

Added references to Section VI.F.ii and the FAQs in section VII for special circumstances where such expenses might be reimbursed but still treated as taxable.

Section VI. Related Information:

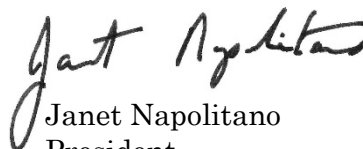
Updated to include reference to IRC Sections 152(c) and 152(d); and the Code of Federal Regulations sections 200.432 & 200.474.

Section VII. Frequently Asked Questions:

A new section is added on Dependent Care Expenses and Dependent Travel Expenses and includes the definition of a dependent, how federal funds can be charged, and the taxability of such reimbursements.

This revised policy is **effective as of July 1, 2019** and will be posted online at <http://policy.ucop.edu/>.

Yours very truly,


Janet Napolitano
President

Enclosure

cc: Division Leaders
Associate Vice President and Systemwide Controller Arrivas
Manager and Tax Services Coordinator Barrett
Ethics, Compliance and Audit Services Chief of Staff Levintov
Universitywide Policy Office