



Institute for Pure & Applied Mathematics
An NSF Math Institute at UCLA



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Please read this page if you are a speaker or funded participant for an IPAM program. Funded participants to a workshop may receive IPAM support for accommodations, travel, or both. Please refer to your invitation letter for the terms of your offer from IPAM.

First and foremost, we must emphasize the fact that since our primary funding is from the National Science Foundation (NSF), we must conform to both University and Federal guidelines for the processing of payments and reimbursements. The following summarizes IPAM travel and reimbursement policies, which are based on Federal and UCLA Travel Regulations. These guidelines are for your information, and actual reimbursements will be based on the allowable amounts pre-approved by IPAM for each individual.

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Reimbursable Expenses

Reimbursements will be processed by the administrative staff of IPAM upon the completion of the particular program. These reimbursements will be based on written commitments from the Directors unless alternate arrangements have been made and necessary approval has been granted. Since all programs are funded through the National Science Foundation, all reimbursements will be based on applicable University and federal guidelines. In addition, all federal and state taxing regulations will be followed. Original receipts will be required. There is extensive information on the UCLA policies on business travel on the web site of the [UCLA Travel Department](#).

Lodging:

Expenses are reimbursed based on the amount actually incurred within the allowable amount stated in the invitation letter. Generally lodging is not reimbursable if the lodging site is within a 50-mile radius of the traveler's residence or office. For exceptions to this rule, approval must be granted based on appropriate justification.

Air Travel:

The Federal Travel Regulation requires U.S. carriers. All flights on non-U.S. carriers are ineligible for reimbursement. For more information, go to [Purchasing Your Airline Ticket](#).

Travelers must use air coach or equivalent fares when available and are encouraged to take advantage of discounts on air tickets purchased in advance. If a trip is extended to save money on airfare, the cost of additional lodging, car rental, meals and incident expenses are reimbursable, provided such expenses do not exceed the amount that would have paid if the trip had not been extended.

Ground Transportation:

For taxi, shuttle, train, bus, and all other ground transportation expenses, original receipts are required. Travelers are required to use the most economical mode of transportation by the most frequently traveled route.

Automobiles:

Privately Owned – Private automobiles may be used if the driver has requisite insurance coverage. IPAM reimburses the lesser of round-trip air fare or mileage. When used on routes served by a common carrier, the amount of the actual mileage or the lowest available airfare, whichever is less, is allowed. The mileage reimbursement rate of \$0.585/mile is set to conform to Internal Revenue Service (IRS) guidelines. This rate is effective as of 2008, and will be adjusted periodically to reflect increases/decreases in the IRS standard mileage rate. No additional reimbursement for automobile-related expenses, such as tolls, ferries, parking, gasoline, etc. will be allowed.

Rental Car – IPAM does not normally reimburse for car rentals. The use of a rental car must be PRE-APPROVED by IPAM with appropriate justification.

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Non-Reimbursable Expenses

- Airfare issued by non-U.S. carrier.
- First class airfare.
- Unauthorized extra class rail or airfare.
- Personal telephone calls.
- 3rd party (example: buying ticket and paying hotel/air fare and other expenses on behalf of others).
- Per diem
- Out-of-route costs involving personal business, leave or convenience. Where there is an interruption of travel or deviation from direct route, reimbursable expenses shall not exceed the cost of hotels, meals, and other expenses that would have been incurred on a direct reroute to the destination.
- Expenses incurred when you are obviously not conducting IPAM business, such as extra days taken as leave before or after scheduled business.
- **Any other costs determined to be unreasonable or which are disallowed by Federal Travel Regulations or University guidelines.**

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Purchasing Your Airline Ticket

*****Important Restriction for Reimbursement*****

In order to receive reimbursement for your airline ticket from IPAM funds, please note this important restriction: **Your trip must be ticketed by a U.S. airline or we cannot reimburse you for the flight!**

Unfortunately, our funding from the United States National Science Foundation (NSF) has restrictions for travel that we must follow:

"Any air transportation to, from, between, or within a country other than the U.S. of persons or property, the expense of which will be assisted by NSF funding, must be performed by or under a code-sharing arrangement with a U.S.-flag air carrier if service provided by such a carrier is available. Tickets (or documentation for electronic tickets) must identify the U.S. flag air carrier's designator code and flight number."

Your travel agent may, with the best of intentions, attempt to persuade you that because the flight is code-shared it doesn't matter which company you buy the ticket from: for example, KLM or British Airways or Air France, especially because these are generally less expensive. However, for reimbursement purposes it does matter. If you buy a ticket from Lufthansa, for instance, the flight numbers will be preceded by the code "LH" and we cannot reimburse this. The flight numbers must have the code from a U.S. airline (e.g., "UA" for United Airlines, "DL" for Delta, "TW" for TWA, etc.). In this case, the flight must be ticketed by the U.S. carrier and cannot be ticketed by a travel agent or through an internet agent such as Orbitz. As long as the flight is ticketed by the U.S.-carrier alliance, it does not matter on which airline you actually fly. Please see our webpage "[Airline Alliances](#)" to find out which American airlines have alliances with foreign carriers.

If you have any questions please email finance@ipam.ucla.edu.

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How to Claim Reimbursement: Short Workshops

In order to claim reimbursement for your travel expenses, you must complete a set of necessary forms and paperwork to provide basic information regarding reimbursement check distribution (full name and mailing address) and Visa status. The finance staff will provide these forms via e-mail, or you may pick them up in the Finance Office during your visit.

The standard procedure is to process payment for all reimbursable expenses based on actual costs. All travel and lodging receipts must be submitted after the expense has been incurred. During your visit to IPAM, you will submit all the necessary paperwork to the finance staff along with any travel receipts you have at the time. You will also be provided with an addressed envelope to send us the rest of your receipts/paperwork once you complete your journey.

When we have all the necessary documentation and receipts, they are submitted to the University Travel Accounting for payment. Once received in the accounting office, it typically takes between 5-12 working days for processing, and the reimbursement check is then mailed to the address provided to us. The process can be delayed if the documentation does not pass the audit based on the University and Federal Guidelines. So you should expect to receive payment approximately two to three weeks AFTER we have received all receipts.

Travel Expenses:

For airfare, our general policy regarding airfare is to cover a direct, round-trip, economy class flight from your home institution to IPAM. Our maximum contribution towards travel expenses is stated in your invitation letter. Generally, it is \$250.00 for flights within California, \$500.00 for flights within the continental United

States, and \$1,200.00 for international flights. All flights must be booked and/or **ticketed through an American carrier**. Also, please **be sure not to book a travel package through an internet vendor or travel agent which includes airfare plus hotel**. We also realize that many of our participants maintain busy schedules and do not always fly directly from their home institution to IPAM and back again. To accommodate travelers on multi-leg trips, IPAM will reimburse up to the equivalent round-trip economy airfare, with a 3-week advance purchase, from the nearest airport to your home institution. All stipulated limits and terms discussed in your invitation letter will still apply.

To reimburse for travel expenses such as airfare, we need the original receipt for the ticket. If traveling with an e-ticket, the e-mail receipt/confirmation with proof of payment will suffice. A paper receipt may also be requested at the airline check-in counter. All flight receipts/documentation must include the form of payment. (For example, if the airfare was paid with a credit card, it may include VISA xxxxxxxx1234).

For those participants who obtain airfares below IPAM's allotted limits, we will cover ground transportation to the upper limit of their travel allowance. For example, if a participant is from Chicago, and their airfare is \$400.00, the remaining \$100.00 may be used for ground transportation. Receipts are required for all ground transportation reimbursements. Average amounts range from \$30.00-40.00 for a shuttle/taxi ride to IPAM from the Los Angeles Airport, and \$15.00-18.00 for a shared-ride van. For all taxi, shuttle, train, bus and all ground transportation expenses, **original receipts are required**.

Lodging:

IPAM has negotiated discounted rates at several area hotels for participants in our programs, and we encourage our participants to make use of them. We reimburse for room and tax charges only and per university policy, hotel reimbursements are offered only to participants outside of a 50-mile radius from IPAM.

For a list of participating hotels and their rates, please visit: <http://www.ipam.ucla.edu/visitors/hotel.aspx>

For participants not electing to stay at one of our designated hotels, IPAM covers up to \$100.00 per night for room and tax charges. IPAM generally offers six nights of hotel expenses for domestic travelers, and seven nights for international participants. For international participants, staying in Los Angeles for a Saturday night will often reduce airfares by as much as half. If this is the case in your situation, simply send an email to finance@ipam.ucla.edu before your visit and explain the situation.

To claim reimbursement for your hotel expenses, submit your itemized hotel folio and make sure it displays a zero balance. You may submit this information to the finance staff before you leave IPAM, or you may mail/e-mail/fax it after you complete your journey.

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How to Claim Reimbursement: Long Programs

For most of our long programs, we have a handful CORE long-term participants plus a constant flow of speakers/guest participants for the concurrent workshops, and the finance staff is responsible for facilitating the flow of financial support to the hundreds of participating speakers and guests throughout the duration of the program.

Therefore, in order to provide individualized service to the long-term CORE participants who usually contribute to the program for months, the Finance Staff will usually meet with each CORE participant individually. Once you arrive at IPAM, you will be asked to sign up for a finance appointment. You will then receive an e-mail confirmation for your scheduled meeting, along with a PDF file with forms for you to fill out and submit to the Finance Office. Please complete the forms and bring them to your appointment, and we will provide an addressed envelope for you to send us your travel receipts once you complete your journey.

When we have all the necessary paperwork, the documents will be reviewed and processed for submission to the University Central Offices (Travel Accounting/Accounts Payable). Once received by the Central Offices, it typically takes between 14-21 working days for processing. The process can be delayed if the documentation does not pass the audit based on the University and Federal Guidelines. The initial checks will be mailed to IPAM and you will be notified to pick them up from our office. The final payment will be mailed to the address provided to us on the form you submitted.

Travel:

For airfare, our general policy regarding airfare is to cover a direct, round-trip, economy class flight from your home institution to IPAM. Our maximum contribution towards travel expenses is stated in your invitation letter. Generally, it is \$250.00 for flights within California, \$500.00 for flights within the continental United States, and \$1,200.00 for international flights. All flights must be booked and/or **ticketed through an American carrier**. Also, please **be sure not to book a travel package through an internet vendor or travel agent which includes airfare plus hotel**. We also realize that many of our participants maintain busy schedules and do not always fly directly from their home institution to IPAM and back again. To accommodate travelers on multi-leg trips, IPAM will reimburse up to the equivalent round-trip economy airfare, with a 3-week advance purchase, from the nearest airport to your home institution. All stipulated limits and terms discussed in your invitation letter will still apply.

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Housing

Most CORE participants arrange for long-term monthly housing. (Please refer to the short-term guidelines for reimbursements for hotel expenses.) We cannot process the reimbursement until after the first 30 days has elapsed, allowing about 14 working days for processing AFTER we have received all receipts. You can expect payment approximately 6 weeks after the day you arrive at IPAM.

For housing reimbursements, you must submit a copy of your rental agreement, along with a copy of your rental check. You must also include some form of documentation with proof of payment – that is, proof that your rental check has been cashed. If you are given a paper receipt, the issuer should indicate the form of payment. A copy of the front and back of the check will also suffice.

Stipends

If you will be receiving a stipend, the paperwork will be processed once you arrive at IPAM. You can expect the first payment from 25-30 days after the paperwork is submitted to accounting. It is important that you have either a social security number or a tax ID number. Otherwise, an automatic 30% will be withheld from your stipends.

If you are an alien, your taxes will be processed through a software program called Glacier, a nonresident tax compliance system that was adopted by UCLA. If you are not a U.S. Citizen or Permanent Resident, be sure to sign up on the yellow sheet to obtain Glacier login information, and also pick up a Glacier information packet.

Other Expenses

While this page includes general information about common expenses, individual cases may include other reimbursable expenditures. Please feel free to contact the finance staff at finance@ipam.ucla.edu with any questions or special circumstances.

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