

UCSF School of Medicine



Travel, Meeting & Entertainment
Guidelines During COVID
And Gift Policy Update
SOM Finance Managers' Meeting

December 17, 2020

Travel

Domestic & International Travel

International Travel

UCSF is restricting all non-essential university-sponsored international travel to any country.

U.S. Travel Outside the Bay Area or Fresno

UCSF is restricting all non-essential university-sponsored domestic travel to other states as well as beyond the Bay Area (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano and Sonoma) or those who live and work within the Fresno area (Fresno, Madera, Kings and Tulare).

UCSF strongly recommends against all non-essential personal travel.

Obtaining Approval for Essential Travel

1. The Requester must complete the [Pandemic Travel Approval Request Form](#).
2. The DocuSign form is automatically routed to Simon Schuster and Amal Smith after a number of other approvers, so do make sure there is a good lead time of at least 2 weeks before traveling. Based on the travel itinerary and justification, the Dean's Office will accept or not accept the Request, and signs and dates the form.
3. If the travel is approved, the Recovery Operations Center (ROC) will contact the Requester to share standard links and a person to contact for travel safety information if needed. Email confirmation is required that the Requester has registered for UCSF travel insurance.
4. If the travel is not approved, ROC contacts anyone planning travel without approval to verify travel has been cancelled. If Requester wants to appeal the non-approval of travel, the ROC will send an email with the appeal process.

Defining Essential Travel

Students, Residents, and Fellows:

Defined as travel that is required – and cannot be postponed – in order to:

- Meet a graduation or completion requirement (e.g., travel to another location to complete a rotation, or to obtain a student visa.)

For Faculty and Staff:

Defined as travel that is required – and cannot be postponed – in order to preserve the:

- Safety of a patient or research subject or
- Results of a research activity

Essential faculty and staff travel does not include travel to attend educational conferences. Many other activities would also be considered non-essential travel.

Please provide good business justifications for essential travel requests.

Examples Justifications for Essential Travel Requests

Examples of approved requests:

1. International travel request - Change visa from J1 to E3 for faculty appointment. Had to interview at a US embassy outside of the US.
2. For Professional Development Leave. To join the Primary Care Division at an international University. Year long leave.
3. Essential research that cannot be postponed.
4. International travel to SF to attend on the inpatient geriatrics service
5. at Moffitt-Long.

Examples of unapproved requests:

1. International trip to Italy via UK with 2 weeks quarantine in each country (with a further 2 week quarantine in US upon return) for a 1 day meeting to confirm experiment data with collaborators.
2. Editorial Board Meeting.
3. To collect samples.

Meeting and Entertainment

University Events

- All non-essential in-person events and gatherings – whether on-campus or off-campus – shall be canceled or postponed.
- Events and gatherings that are essential to the operation of UCSF, a healthcare institution, may be exempted. [More information about essential events can be found here.](#)
- To request an exemption to the interim policy restricting non-essential events and gatherings [please complete this form.](#)

For virtual [business meetings](#), food is **not allowed** per supply Chain Management.

For virtual morale events, food is allowed still following the *BUS-79 policy. Meals can be paid for by distributing gift cards for food delivery services like Uber Eats, DoorDash, etc. Amazon or Visa cards must not be used. When gift cards are used for food, the frequency rules for *giving* gift cards do not apply although the meal frequency rule does still apply. We do ask you to be careful and prudent during this period of economic uncertainty.

*Although the per person dinner limit is \$81 when distributing a gift card please do not exceed \$75 (the gift card max). It just raises too many flags for us!

Gifts vs Office Items

Effective January 1st, 2021

Swag, e.g., clothing, mugs, etc., can no longer be defined as office items, work equipment or uniforms. These item types can still be given, but will be considered as a gift and will fall under the UCOP gift policies :

G-41 for employees (Admin, post-docs, faculty, residents ,fellows and families related to employees). Employee recognition awards are meant to be occasional and therefore must be presented to an employee on an infrequent basis. An employee should **not receive more than three** such awards in a calendar year at **no more than \$75 value per instance**. This must be tracked by the employee's home department. If the value is greater than \$75, the full value is taxable to the employee receiving the gift.

G-42 for non-employees (business affiliates, graduate students, donors etc.).

| Type | Examples | Per calendar year |
|-------------------|---|-----------------------|
| Promotional Items | A t-shirt, cap, pennant, mug, pen or similar item that bears the logo of the University or a campus | <=\$75 per individual |

Contacts

- SOM Contacts:
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