Bourns College of Engineering, Dean's Office

Dependent Travel – procedure for approval and considerations

Procedure Owner: BCoE, Dean's Office
Effective Date: July 1, 2026

Objective:

This policy defines the criteria, financial boundaries, and routing mechanisms required to request university-funded reimbursements for travel expenses related to a spouse, domestic partner, dependents, or dependent-care providers who accompany a BCOE employee or candidate on bona fide University business travel. This document ensures structural alignment with the systemwide UC Policy G-28_TravelRegulations, IRS guidelines, and BCOE fiscal integrity objectives.

Policy:

As part of BCOE's commitment to fiscal stewardship, the college enforces rigid controls over discretionary expenses related to travel exceptions. Funding for companion or dependent travel is never a baseline entitlement. Per UC Policy G-28, any reimbursement issued under this policy without an explicitly verified, overarching University business purpose is legally treated as taxable income to the employee, and will be reported to central Accounting and Payroll.

1. Dependent care or companion travel expenses may be allowed only if they satisfy all of the following foundational conditions:
    a) The primary traveler is executing essential, non-delegable University business (e.g., specific recruitment events, systemwide committees, principal investigator research obligations).
    b) The care-giving expenses requested are directly related to dependent care provided outside of normal, routine working hours while actively traveling.
    c) The accompanying individual is structurally required to ensure the primary traveler can fulfill their business obligations (e.g., care of an infant/dependent requiring specialized attention).
    d) The department has verified that uncommitted, appropriate funding exists.

2. There are distinct categories within G-28 that are allowed to be covered:
    a) Spouse/domestic partner – must be traveling for bona fide university purpose, which does not include providing care for the dependent.
    b) Dependent-care provider – attending solely to provide care of a dependent while the University traveler attends to business obligations (i.e., nanny, au pair).
    c) Dependents – travelers legal dependent under the age of 13 or with documented medical or disability-related necessity.

3. Items explicitly disallowed:
    a) Personal travel extensions or leisure activities booked adjacent to the business trip for the companion or care-giver.
    b) Standard, routine child-care costs that the employee would normally incur while working a regular day on campus.

c) Expenses submitted post-travel without an executed, signed pre-approval form on file in the Dean's office.
d) Prepayment of travel expenses for the spouse/domestic partner, dependent-care provider, or dependent.

4. Fiscal caps and funding safeguards
    a) $750 max reimbursement for dependent-care provider and dependent per trip.
    b) $1,500 max reimbursement for dependent-care provider and dependent per year.
    c) Allowable expenses are limited to the lowest-cost economy airfare. Meals and incidentals (M&IE) are not reimbursable for spouse/domestic partner, dependent-care giver, or dependent.
    d) In accordance with G-28, these expenses may not be charged to State (199XX) or Federal Grants. A non-discretionary fund must be identified.
    e) Per G-28, dependent travel reimbursements are legally treated as a taxable benefit. All approved amounts will be reported as imputed income at year end.
    f) Non-Duplication of Benefits: In accordance with the IRS Publication 503, expenses reimbursed by the University cannot be claimed through a Dependent Care FSA or the Federal Child and Dependent Care Tax Credit.
    g) Non-employee travelers must complete the UCR Waiver of Liability and the department should retain for documentation.

Procedure:

1. Travelers must first make a formal request to the college, with justification and relevant information regarding who is traveling, what the business purpose is, and why a spouse/domestic partner, dependent care provider, and/or dependent need to accompany the traveler.
    a) The employee must complete the BCOE Dependent Travel Pre-approval form (insert link) and provide written business justification at least 15 days prior to the departure date.
    b) The request should be routed through the departmental analyst to ensure appropriate funds are available.
    c) The departmental FAO needs to review the request to verify it meets G-28 and BCOE policy requirements, and sign for approval.
    d) Department Chair should review for academic or operational necessity and sign for approval.
    e) After departmental approvals are secured, the pre-approval form is routed to the Dean's Office Policy Analyst for review of policy compliance.
    f) Once compliance and necessity are confirmed, the CFAO and Dean will review and determine approval or denial.