

HIP Business Office Best Practice Guide

General:

- Use the HIP forms on our HIP Website: <https://hip.ucdavis.edu/forms>
- Review the HIP Employee Guide: <https://hip.ucdavis.edu/guidelines>
- For procurement, submit forms to the central inbox: hip-purchase@ucdavis.edu
- For travel and entertainment, submit forms to the central inbox: hip-aggietravel@ucdavis.edu
- Be available for follow-up questions and requests for information when submitting a request to the HIP Business Office.
- When in doubt, reach out to any of the HIP Business Office staff and they will re-direct you as appropriate.

Travel:

- If you are eligible for a [UCD Travel Card](#), apply and use it instead of incurring expenses out-of-pocket which are prohibited by policy. Please contact the business office prior to your purchase if you need an exception to this policy.
- When possible, book airfare, car rental, and lodging through AggieExpense.
- Always register trips outside of CA with UC Away <https://ehs.ucop.edu/away>.
- Know and stay within [meal limits](#) and [lodging limits](#).
- Make sure [valid receipts](#) indicate the dollar amount, date, place of purchase, identification of what was purchased, and proof of payment (cash or last 4 digits of credit card).
- Keep all valid receipts. They may end up not being required but this will avoid a Declaration of Missing Receipts Form for expenses where receipts are required.
- Always include a brief but detailed business purpose ([Examples](#)).
- If getting help for a travel report from an AggieExpense delegate, allow time for them to prepare the report so you can submit your travel and entertainment expenses within 45 calendar days of the end of the trip or event.

Purchasing:

- Submit purchase requests through the [HIP Purchase Request Form](#).
- Plan to allow processing time to meet your timeline:
 - AggieBuy Orders: ~2-3 business days
 - Setting Up Purchase Order or Contract: ~4-6 weeks (may take longer if vendor is unresponsive)
- Avoid out-of-pocket purchases, as they are prohibited by policy. Please contact the business office prior to your purchase if you need an exception to this policy.
- Do not collect W9s from vendors. Instruct vendors that the University will provide them with secure upload instructions.
- Know what documents and information are required based on the type of Purchase Agreement: <https://hip.sf.ucdavis.edu/contracts-and-services-how>
- For Software and Online Services, initiate the [Vendor Risk Assessment \(VRA\)](#). Plan ahead, as it can take 4+ months for the University to fully vet and approve software/online services before purchasing is allowed.

Entertainment:

- If you are eligible for a [UCD Travel Card](#), apply and use it instead of incurring expenses out-of-pocket. Please contact the business office prior to your purchase if you need an exception to this policy.
- Know and stay within Entertainment Meal Limits:
 - <https://supplychain.ucdavis.edu/travel-entertainment/entertainment/allow-expenses>
- Make sure receipts indicates dollar amount, date, place of purchase, identification of what was purchased, and proof of payment (cash or last 4 digits of credit card)
- Always include a brief but detailed business purpose ([Examples](#)).
- Names of all attendees are required for entertainment expenses. Please use a [sign in sheet](#) for all events.
- Have programmatic material (e.g., a flyer, invitation) for entertainment events to prove the event took place.

Travel & Entertainment Policies: <https://supplychain.ucdavis.edu/travel-entertainment/policies>

Procurement & Contracting Services Policies: <https://supplychain.ucdavis.edu/procure-contract/policies>