

MAY
2025

Uber for Business Dashboard and Audit Guide

Statewide Travel Program



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Purpose: This Uber for Business (U4B) review guide will provide a baseline for departments when analyzing data from their associated travelers in U4B. This guide will walk you through the various tabs that can be found on the left-hand side of the U4B dashboard: Programs, Activity, Team (People & Groups), Billing, Insights, and Sustainability.

This guide will explain what activity is not allowed by a traveler on official state business and what information may require follow-up, depending on the circumstances.

Dashboard Overview

When logging into the U4B dashboard, you will see the below tabs:

- **Programs:** Lists the department associated with the account, description of the program, and the rules for expense codes/spending allowance/trip allowance/locations.
- **Activity:** Shows all ride activity – date, time, employee name, location, program (department), and total ride cost for each trip taken.
- **Team:** Includes all U4B employees, their role, and their status, i.e., active, awaiting approval, not joined.
- **Billing:** Provides an account summary for the month, remaining credit limit, payment methods, statements/invoices, and past payments.
- **Insights:** Divided into two tabs (Travel & People).
 - The Travel tab displays total spending, number of rides, number of people, rides by location and other usage metrics.
 - The People tab shows information, such as the number of linked employees, active users, or first trips taken.
- **Sustainability:** Provides insights on CO2 emissions from U4B.

Programs

The “Programs” tab shows active and inactive Programs broken down by groups (department) with which it's associated. If you edit your program, you will be able to alter the program name (how it appears in the Uber app) and the program description (shown in the Uber app). You can also create rules for the employee to follow, such as an expense code, spending allowance, trip allowance, location, time, ride type, and schedule.

| Rules | | |
|--|---|---|
|  Expense Code | Expense code required Do not allow custom codes Expense memo is required | > |
|  Spending allowance | Limited Coverage USD 150.00 per trip | > |
|  Trip allowance | Allow all trips | > |
|  Locations | Any location | > |
|  Time | All Day (24 Hours) | > |
|  Ride type | Limited ride types (9 selected) | > |
|  Schedule | No schedule | > |

Activity

The screenshot shows a dashboard interface with two tabs: "All Activity" and "Reviewed Activity". Below the tabs are several filter fields: "Name" (text input), "2024/09/29 - 2024/10/29" (date range), "Location" (dropdown menu), "Program" (dropdown menu), a "CSV" button, and a "View Exports" dropdown menu.

1. The "Activity" tab can be filtered by name, date, or location. Once filters are selected, select "CSV." The filtered report will be sent to the email address you have on file with U4B. The CSV file will include:
 - a. Time of pickup and drop-off, often including the full address.
 - b. Duration of the ride.
 - c. Vehicle type and distance traveled.
 - d. Trip fare, subtotal, taxes or surcharges, and total fare.
 - e. Expense code/Expense memo
 - i. Travel status.
 - ii. Off-site meeting.
 - iii. ***Please note*** Expense codes will only apply to a department if they have set this up with their U4B account. Expense codes are an easy way to manage charges and expenses for a Travel Expense Claim (TEC).

2. Review Expense Codes and Expense Memos.
 - a. Expense Code "Currently in Travel Status" is used when the employee is on authorized travel status.
 - i. Look for indicators or warning signs that suggest potential issues or misuse:
 1. Itinerary – Date and/or times are within normal business hours/days?
 2. Location – Pickup and/or drop-off locations are business-related locations?
 3. Purpose of travel – If not business-related, then the traveler and/or traveler's manager should provide additional information.
 - b. Expense Code "Offsite Meeting" is generally used when traveling between headquarters and local offices/worksites on official business.
 - i. Look for indicators or warning signs that suggest potential issues or misuse:
 1. Location of meeting – Is the location a bona fide business or is it a residence/social spot/non-business location?

- c. "Expense Memo" is a freeform justification for the purpose of the trip.
 - i. Must be included and must be informative; a detailed summary noting the purpose of the ride.
 - 3. "Service" is the class of service used, or different ride type/option. Review the type of service.
 - a. Approved vehicle classes:
 - i. UberX: standard ride
 - ii. Uber Assist: for individuals with accessibility needs
 - iii. Uber Pool or UberX Share: multiple riders traveling in the same direction share a single vehicle
 - iv. UberWAV: wheelchair-accessible vehicle
 - v. Wait and Save: cheaper fare in exchange for a slightly longer wait time for the pickup
 - b. Additional vehicle classes that must be approved by an employee's manager (justification must be included in Expense Memo):
 - i. UberXL
 - 1. List of fellow employees sharing the ride is required, and/or
 - 2. Description of cargo traveling with employee.
 - ii. Uber Green
 - 1. If costs are the same as UberX, it's allowable. If costs are higher, the class is prohibited.
 - c. Non-approved vehicle classes under any circumstances:
 - i. Uber Comfort.
 - ii. Uber Black SUV.
 - iii. Priority / Reservation.
 - iv. ***Please note*** The non-approved ride classes may expand over time due to new features on the U4B website. There won't always be a memo to cover the immediate changes to the U4B ride classes, but Travel Coordinators (TC) are expected to educate employees on the current rules and regulations relating to using U4B.
4. Review the Trip Fare and Fees
 - a. When booking a ride with U4B, there will be fees associated with the basic trip fare. Examples of these fees include a Booking Fee, CA Driver Benefits Fee, Access for All Fee, and occasionally an Airport Surcharge Fee.
 - b. You can review these fees by selecting the desired employee/trip in the "Activity" tab, then click "Email Receipt" at the bottom of the pop-up page. Once you have emailed the receipt to yourself, click on the blue question mark (?) next to view more information about the fee.

| | | |
|---------------------------|---|---------|
| Subtotal | | \$17.53 |
| Booking Fee ? |  | \$14.93 |
| SMF Airport Fee Surcharge | | \$2.50 |
| CA Driver Benefits ? |  | \$0.86 |
| Access for All Fee ? |  | \$0.10 |

- c. Undesirable fees: Cancellation fees, wait time fees, and reservation fees are all examples of charges that should be avoided on your agency's U4B transaction reports. These charges are unnecessary expenses that are charged to the department by an employee.

Team

The "Team" tab is broken down into People and Groups.

The "People" tab displays employees that are active, awaiting approval, and not joined. If a traveler is listed as not joined, this means that they have been added to the U4B account and the invitation email has been sent, but they have yet to connect their personal Uber account to the U4B account. This section is also where you would add a new user to U4B, delete a U4B user, or modify a U4B profile. You can search for an employee by name, email, role (usually employee), or group (department).

The "Groups" section displays the number of employees in each associated department.

| Groups | | |
|------------|-----------|---------------------------------------|
| 2 Groups | | Create Group |
| Group name | Employees | Programs |
| CCDA (DGS) | 0 | Uber for Department of General Ser... |
| General | 131 | Uber for Department of General Ser... |

People

Active employees
96 / 111

Active Awaiting Approval Not joined

All people Active Awaiting approval **Not joined 15**

Search by name or email Role Groups Domains

Billing

The “Billing” tab provides payment and statement information such as the current spending for the month, the credit limit for the account, monthly invoices, past payments and service fees. On this page you will be able to make a payment on the current monthly charges, add a payment method, or update a payment method.

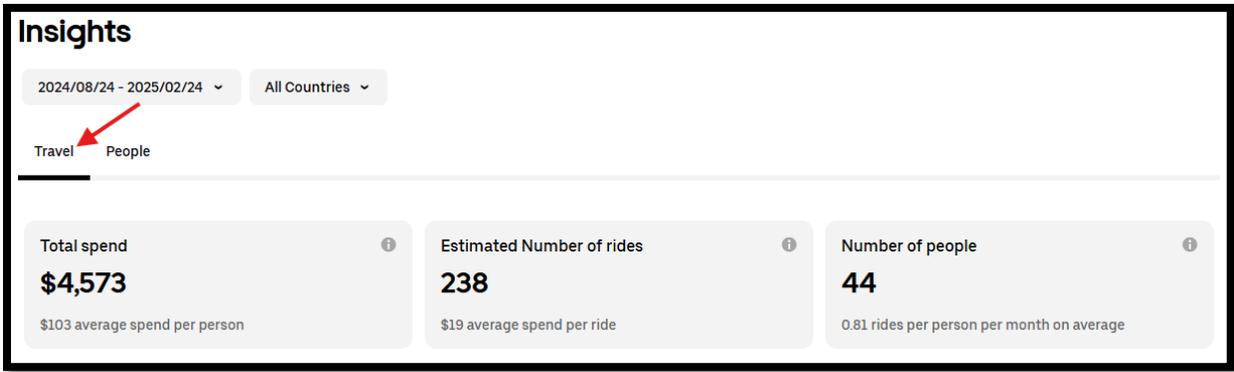
Statements and Invoices

Monthly statements received by 5 users. ✎

| Date | Balance | |
|---------------|----------|------------|
| February 2024 | \$65.86 | Download ▾ |
| January 2024 | \$191.50 | Download ▾ |
| December 2023 | \$61.88 | Download ▾ |
| November 2023 | \$80.88 | Download ▾ |
| October 2023 | \$23.90 | Download ▾ |

Insights

The “Insights” tab is broken down into content for “Travel” and “People.” The “Travel” section will display the number of rides booked within a custom date range, total spend, number of rides booked, locations where the rides were booked, and employees with the highest spend.



Data shown on the "Travel" Insights tab includes:

1. Rides by time of day, including an option to see rides outside working hours



2. Spend across ride types and rides by location

Spend across ride types

| Ride type | Number of rides | Spend |
|--------------|-----------------|------------|
| UberX | 221 | \$4,022.90 |
| Low-emission | 4 | \$141.18 |

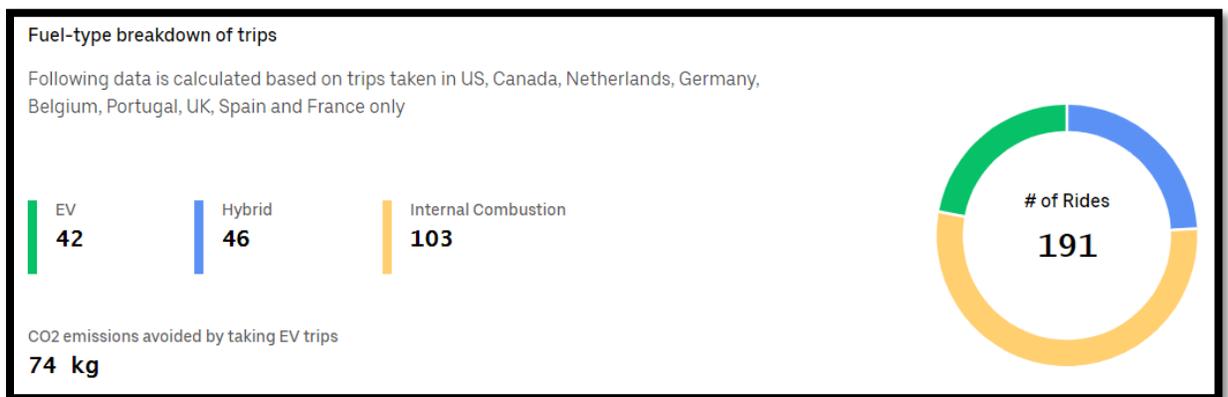
Data shown on the “People” Insights tab includes:

1. Graph displaying total employees invited and other employee information



Sustainability

The “Sustainability” tab provides data on CO2 emissions related to Uber rides and low-emission trips. On this tab, you can find performance measures on the number of low-emission trips, the estimated miles traveled, total CO2 emissions, and the average CO2 emissions per mile. You can filter the data based on a custom date range and the associated program (department).



Unauthorized U4B Activity

Departments should create U4B policies and procedures tailored to their organization's needs. Travel Units are responsible for monitoring employee activity to identify and remove unauthorized U4B activity.

When conducting an audit of U4B activity, the following actions are considered unauthorized:

- Booking personal rides
- Using U4B to commute from home to headquarters/office (and vice versa)
- Charging tips to the U4B account
 - For more information on tips, please click here: [Human Resources Manual / Tips - CalHR](#)
- Booking premium rides (Uber Comfort, Uber Black, Uber Black SUV)
- Booking Reservation fee (Uber Reserve)
 - This fee is for scheduling rides in advance; the fee is for the driver's additional wait time and time/distance spent traveling to the pickup location

Questionable U4B Activity

When conducting an audit of U4B activity, the following actions are considered questionable and further research should be conducted:

- Booking UberXL or larger vehicle rides
 - Listed in the expense memo should include a justification as to why the traveler needs an XL vehicle, including but not limited to multiple travelers sharing a ride and/or traveling with cargo/equipment.
- Higher than usual fares for distance (surge pricing)
 - Rush hour or surge pricing can affect costs. This automatically goes into effect when there are more travelers in each area than available drivers.
- Rides from unusual locations or times
 - Look for rides out of state or that do not coincide with the traveler's itinerary.
- Booking multiple U4B trips in one day by the same traveler
 - Would it be cheaper for a traveler to rent a car verse making multiple U4B trips?
 - Travelers should complete a cost comparison for other ground transportation options, i.e., personal vehicle, rental car, etc.