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| Uber for Business Policy Template | |
| Statewide Travel Program |

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# PURPOSE

The purpose of this policy template is to advise employees on the expectations and procedures when utilizing the Uber for Business (U4B) direct-bill option.

U4B allows all business-related rideshare charges to be billed directly, removes the expense burden from travelers and reduces the number of Travel Expense Claims (TECs) submitted for accounting to reimburse. U4B is the only Transportation Network Company (TNC) service available for direct-bill rideshare at this time.

Employees authorized to travel for official state business will follow these requirements and guidelines. The basic concepts central to policy requirements and guidelines include:

* Each division/agency shall ensure the necessity of all travel, including the method of travel, is in the best interest of the state.
* Employees must receive prior approval for all travel from their manager or approved delegate.
* Employees may still pay for rideshare services out-of-pocket and submit for reimbursement through the normal process. Rideshare expense reimbursement to employees must be for actual and necessary out-of-pocket expenses, consistent with applicable reimbursement rates and rules for traveling on official state business.
* Rideshare expenses paid with U4B direct bill will be held to the same requirements, restrictions, and reimbursement rules as rideshare out-of-pocket reimbursements.
* U4B uses the same mobile application/account as Uber for personal use.

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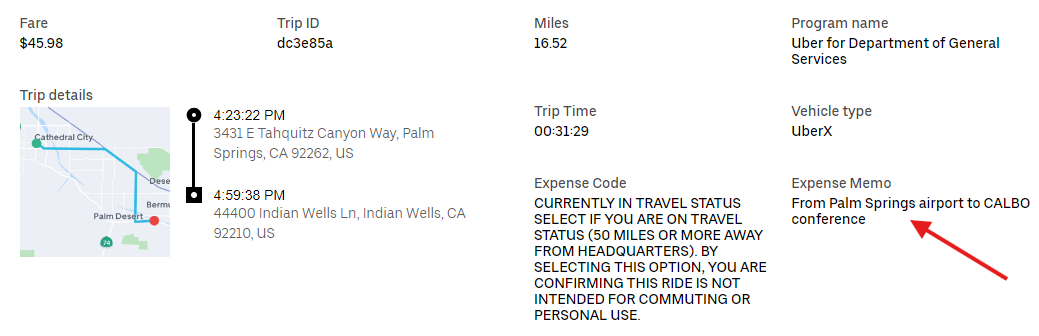
# TERMS OF USE

**Using U4B for personal rides is strictly prohibited.** U4B is only authorized for employees on official state business attending offsite meetings or on travel status. Employees will be required to select one of the following options when requesting a ride in the mobile application:

* **Offsite meetings** – Travel between headquarters and other local offices/worksites on official business. For this policy, an employee’s home is not considered the headquarters, a local office, or worksite.
* **Travel status** – Travel away from assigned headquarters while on official business. Standard for official status is 50 miles or more away from headquarters.

Ride receipts from Uber **must** be attached to each expense claim for business trip reimbursement. This requirement is for both U4B direct-bill rides and rides paid by the employee using a personal payment method.

After selecting the intended use, employees must provide a detailed summary noting the purpose of the ride in the Expense Memo section of the mobile application. Expense Memos must be included and must be informative. Please see the below image for a visual of a trip summary in the U4B Insights tab on their website.



**Examples:**

* Acceptable summary: “From Palm Springs airport to CALBO Conference.”
* Unacceptable partial summary: “Flight,” “Training,” “Conference,” etc., and similar nondescript information.

**U4B is never authorized for commuting from your home to your headquarters under any circumstance.** There is no justification for using U4B to commute, regardless of work status, i.e., teleworking.

* If you telework during your regular work week:
* Using U4B to go from a home to an office and/or an office to a home is considered commuting and is prohibited.
* Using U4B to go from a home to local offsite meetings and/or a local offsite meeting to a home may be considered commuting and is prohibited unless the following conditions are met:
* The cost of traveling to the business or local offsite meeting is less costly when the departure is from an employee’s home; and
* A cost comparison is conducted, documented, and retained with the employee, showing the departure and arrival locations considered and the costs of all options; and
* The employee’s manager or supervisor has approved such use in writing.

Employees are responsible for understanding and complying with any policy as it relates to the U4B Direct Bill Policy.

If an employee is unsure if a particular trip is considered commuting, the employee is required to seek clarification from their division/office Travel Coordinator and/or immediate supervisor/manager prior to using U4B.

# TIPS

**Tips cannot be charged to the U4B direct-bill account.** After completing a trip, riders may (if desired) apply a tip within the mobile application using a personal credit card. Tips are reimbursable up to the amount prescribed in the [CalHR Travel Reimbursements Policy](https://hrmanual.calhr.ca.gov/Home/ManualItem/1/2203). Employees must submit a travel expense claim for reimbursement of a tip.

# APPROVED VEHICLE CLASSES

Employees utilizing U4B are permitted to use the following classes:

* UberX
* Uber Assist
* Uber Pool (this class may also appear as UberX Share. Broadly, it is a shared UberX. If cost estimates do not exceed the cost estimate for UberX, Uber Pool is allowed.)
* WAV (a third party that provides wheelchair-accessible vehicles)
* Uber XL (please see note below on allowable uses of Uber XL)
* Uber Green (eco-friendly ride options, typically priced to match UberX. If cost estimates for UberX and Uber Green are the same, Uber Green is allowed. If Uber Green cost estimates are higher than UberX, the class is prohibited.)
* Wait and Save (typically priced below UberX with a longer wait time)

All other classes are considered outside the policy and not authorized. Using an unauthorized class will result in removal from the U4B account. There will not be any consideration or justification for using other classes. Additionally, Uber features that add additional (i.e., non-mandatory) fees to the ride are prohibited. Examples of this type of fee could include “Uber Reserve,” which allows travelers to set up a future ride for a fee, as well as “Priority,” which allows riders to reduce their wait time for a fee. When these non-mandatory fees are selected by the rider, the agency may seek recoupment of these fees from the employee and consider removal of the employee from the U4B program.

**Note:**

All Uber XL rides must have the following information noted in the Expense Memo field indicating why the larger vehicle was needed:

1. List of fellow passengers sharing the ride and/or
2. Description of the cargo you are traveling with.

A single individual’s height is not a valid justification for using Uber XL.

# COST COMPARISONS

U4B may be used in lieu of a personal vehicle, rental car, or taxi if deemed the least costly method and “in the best interest of the state.” Having access to U4B is not a justification in and of itself for choosing the service over a personal vehicle, rental car, or taxi.

For all offsite meetings and travel status rides, employees must perform appropriate due diligence by conducting a cost comparison **before** travel takes place. Cost comparisons must compare the costs of ground transportation using U4B, taxi, rental car, and/or personal vehicle, as applicable. Cost comparisons must be approved in writing by the employee’s manager/supervisor, and both the cost comparison and the approval must be retained with the employee for audit purposes.

Tools and considerations to use when conducting a cost comparison include, but are not limited to:

**Tools:**

* Uber mobile application + [Uber.com](https://auth.uber.com/v2/?breeze_init_req_id=88dfae0a-e7a0-4e34-ad70-75c9f482d33d&breeze_local_zone=phx6&next_url=https%3A%2F%2Fbusiness.uber.com%2Fdashboard%2F693d9ae6-e383-44e7-8a29-d067d1bed58e%2Fpeople%3Fentity%3Dpeople%26tab%3DAPPROVED&state=XlGCwy_0PLJRoEeggNZq7YT_PdyB6h7LM6UbhvaIvo4%3D)
* [Enterprise Trip Cost Calculator](https://www.enterprise.com/en/business-car-rental/rental-reimbursement.html?msockid=27d71524ce1860ba354c01b0cf546160)
* Third-party estimators, such as [RideGuru](https://ride.guru/)

**Considerations:**

* Taxi stands at airports
* Rental vehicle refueling costs
* Mileage reimbursement
* Parking costs
* Travel duration and time of day
* Location (remote or rural areas)
* Traffic conditions

Cost comparisons/estimates must reasonably encompass all travel for that day/trip. Considerations should be given for the length of trip (duration) and total distance to be traveled.

*For example:* On a two-day trip, ground transportation options are a rental vehicle or U4B. The method of transportation selected will depend on many factors. A typical two-day commercial vehicle rental will cost roughly $90.00; therefore, gas, parking costs, and travel time (picking up/returning, finding parking, possible traffic, etc.) would need to be considered.

Similarly, taking multiple Uber rides in a single day can quickly add up. Employees are expected to use the tools provided to plan and determine the most cost-effective method for ground transportation before departing.

Surge pricing (multiplier applied to the Uber rate during times of high demand) must be avoided for all rides unless unavoidable and must be considered when formulating a cost comparison.

# POLICY ENFORCEMENT

Failure to comply with the policies herein may be grounds for an employee’s removal from U4B and prohibition from using future contracts for the same or similar services.

The agency has the discretion to remove employees from U4B for the reasons described in this section. The state will periodically review and audit trip information to ensure employees comply with all requirements herein.

Violations described in this section will result in the employee’s account being flagged for review. During the review process, employees will be unable to book new rides until the issue(s)are resolved.

Employees whose accounts are flagged for review will receive one warning in writing (via email), which will outline the reasons for the flag. The employee’s supervisor(s) will be copied on the email.

Subsequent violations after the first warning will result in the revocation of the U4B privilege. Policy violations include but are not limited to:

* Using U4B for personal rides
* Using U4B for commuting
* Failure to input an acceptable (see “Terms of Use” above) Expense Memo for a ride
* Failure to use only the approved vehicle classes
* Failure to prepare/provide a cost comparison before using U4B
* Failure to notify (in writing) of any discrepancies or disputes
* Cancelling rides that do not comply with Uber’s cancellation requirements

All issues and policy violations will be reviewed on a case-by-case basis and addressed individually with the employee and the employee’s supervisor.

If it is determined that a ride is not business-related, the employee must switch the payment method from the U4B direct bill to their personal credit card via the Uber mobile application (applies to trips less than 30 days old).

If non-business-related charges are discovered after trips completed in the last 30 days, the state will work with the employee, their supervisor, and/or their division/office Travel Coordinator to correct the non-business rides. If the matter cannot be resolved, the state will require repayment to the department within 15 days to correct the non-business ride.

**Note:**

* The division/office Travel Coordinators are required to provide the reports to supervisors and managers within the division/office to review, approve, and/or dispute charges.
* Supervisors are required to work with and respond to Travel Coordinators to review, approve, and/or dispute charges.
* If a supervisor fails to review each employee’s ride(s) to ensure compliance with this policy, every employee under that supervisor is subject to removal from U4B direct bill.
* Any ride charges determined by the Travel Coordinator or supervisor to be unauthorized will be referred to the state to recoup the funds.

# ONBOARDING PROCESS

* **Requesting U4B access:**
  + When a traveler requests a U4B account through their department-specific website, it should include their legal name, supervisor’s name, FI$Cal reporting structure number, **and** type of U4B account requested.
  + Insert agency-specific procedure for requesting a U4B account.
  + Downloading the Uber mobile application requires compliance with and acceptance of Uber’s policies, including its Community Guidelines. Employees that do not agree to Uber’s policies will not be able to book rides on the U4B platform.
* **Accessing the U4B profile requires**:
* Submitting a request for U4B through proper channels and agreeing to the terms and conditions. Your direct supervisor/manager will need to approve the request as well.
* A personal Uber account with a valid personal credit card on file (sign up for free using the Uber mobile application or Uber.com).

# DISPUTES, REFUNDS, CORRECTIONS, ADJUSTMENTS and CANCELLATIONS

* **For ride, charge disputes, refunds, and/or corrections and adjustments:** 
  + Employees must request help from Uber Customer Support via the Uber app. Within the app, Customer Support can be reached by tapping on the account icon at the top left or right. Employees will then be prompted to select the ride in question and note the specific issue.

Employees must immediately (as soon as the discrepancy is discovered) notify accounting by email of the discrepancy and the need to dispute a charge. Emails must contain the rider’s name, ride date, ride time, and reason for the dispute. Emails must also include the final ride receipt.

**For cancellations:**

* Employees must avoid making cancellations that violate Uber’s cancellation requirements to the extent possible.
* Rides that are cancelled and do not comply with Uber’s cancellation requirements may result in penalty fees.
* Upon request, employees will be required to provide a compelling business reason justifying the penalty/cancellation charges in writing via email. Failure to provide a valid justification for penalty/cancellation fees could result in accounting seeking recoupment of funds from the employee.

# ADDITIONAL RESOURCES AND BEST PRACTICES

## **When to use U4B:**

* When U4B is the most cost-effective (least costly) method of ground transportation and deemed by the authorizing manager/supervisor to be in the best interest of the state.
* Low-mileage trips in which a pool, personal or rental vehicle would sit idly rather than be driven during most of the business trip.
* Transportation is only needed from the airport to the hotel and back to the airport, and U4B costs are lower than using other forms of ground transportation (i.e., personal vehicle, shuttle, rental car, etc.).
* A hotel or airport is near the business location, and a rental vehicle is not the most cost-effective mode of transportation after factoring in relevant costs such as rental fees, parking, and fuel charges.

## **When NOT to use U4B:**

* When U4B is not the most cost-effective (least costly) method of ground transportation.
* When U4B is not deemed by the authorizing manager/supervisor to be in the best interest of the state.
* For trips that will result in long-distance or high-mileage rides.
* During surge or peak pricing hours (unless TNC costs are still less than alternate ground transportation methods).
* When an excessive number of short trips need to be conducted (i.e., total cost of several trips surpasses the daily car rental rate or is not cost-effective).
* When a hotel provides a free shuttle service that will meet the business need(s).

**Uber Mobile Application:**

* Ensuring that the most up-to-date version of the mobile application is installed will avoid/resolve many technical issues.
* Select “Help” in the Account section of the app to troubleshoot various issues.

Contact [business-support@uber.com](mailto:business-support@uber.com) for further technical support or if an issue has prevented you from accessing the app.

Insert additional agency contact information and resource links here.