UWSA Travel Contact*

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Agenda

- E-Reimbursement: Things to know

- Creating Expense Report

- General Information

- Expense Entry

- Payment Types

- Travel Reductions

- Demo

E-Reimbursement – Things to Know

- E-Reimbursement resources on UW TravelWIse
- All travel related expenses must be submitted by the traveler within 90 days after the trip completion date
- If expense report is returned for any reason, it must be resubmitted within 90 days.
- First/Last Day of Trip is 75% of the daily allowance
- Provided meals are deducted from the per diem
- Receipt Requirements

E-Reimbursement

Travelers and alternates create and modify expense reports in the Expenses Tile

Approvers and Auditors review expense reports in the Expense WorkCenter

[Click here to log into the Expense portal](#)

Creating Expense Reports

- Walkthrough: How to Create, Modify and Resubmit an Expense Reimbursement in e-Reimbursement | Travel (wisconsin.edu)

- Video tutorial and other reference documents: Reimbursement | Travel (wisconsin.edu)

General (Header) Information

- **Business Purpose:** choose the best one that fits (Relocation must be correct)

- **Default Location** = primary destination

- **Reference:** where the destination is in relation to traveler's headquarter city

- **Dates:** do not include personal days

- **Attachments:** all required receipts must be attached

- **Accounting Defaults:** funding applied to entire report

- **Justification:** traveler must enter at least one note explaining trip; additional notes can be added by traveler/alternate/approver/auditor

Expense Entry

- **Date:** as shown on receipt

- **Expense Type:** see "help" link for additional information

- **Description:** required for some expense types

- **Reimbursement Method:** see next slide.

- **Additional Information:** varies based on expense type

- **Non-Reimbursable** button: expense will not be reimbursed (typically not required to include these items)

Payment Types

Personal Funds – out of pocket expenses which will be reimbursed

~~**Ghost card** (Central bill card for air only)~~ **no longer!****

Prepaid Purchasing Card
- Required to create an expense line item for P-Card purchases

# Ghost Card (Central Air Billing) Deactivated 9-1-23

How is Airfare Now Paid?

- P-card
  - ✓ May be used for individual bookings if traveler is a p-card holder
  - ✓ Arrangers may use their p-cards to book on behalf of employees, students or guests
    - P-card holder must be added as Arranger in Concur to use card for other employees
  - ✓ [Administrative Group](#)
  - ✓ For large transactions, request temporary limit increase (purchasing@uwplatt.edu)

- Personal credit card
  - ✓ May be used for individual bookings
  - ✓ Airfare expense reports can be submitted for reimbursement prior to travel
  - ✓ Should not be used when booking for guests or non-employees

Direct Charge of Airfare form no longer needed
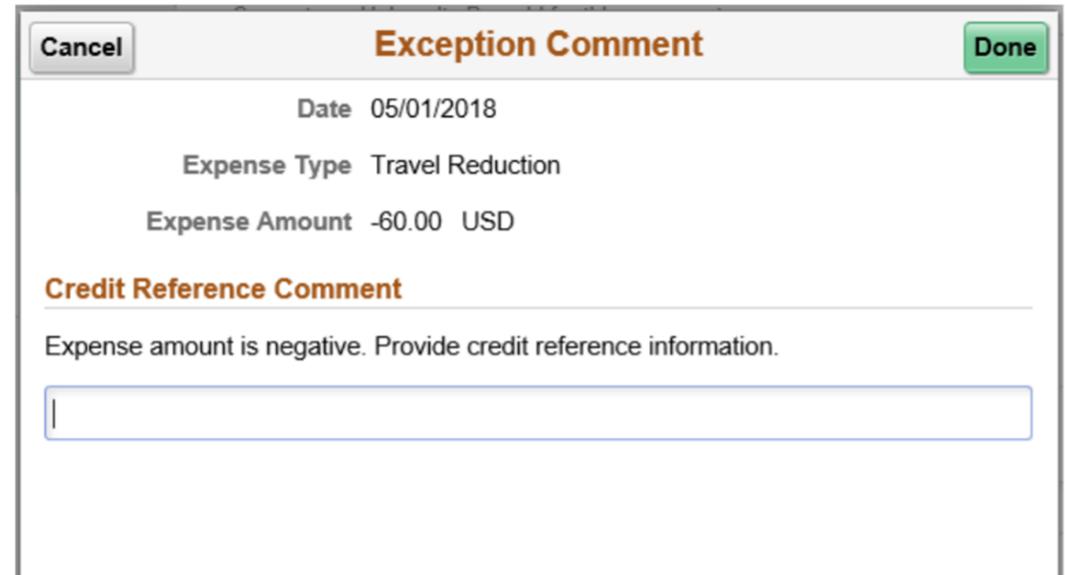
Travel Reductions

- Common reasons to do travel reductions
  - ✓ Reduce to actual cost of meals rather than per diem
  - ✓ Grant or approval for only a specific amount of airfare. Traveler covers any overage.
  - ✓ Traveler to cover amount over hotel max rate
  - ✓ Reduce mileage reimbursement
  - ✓ Reduce overall reimbursement of entire expense
- Include reasoning in justification
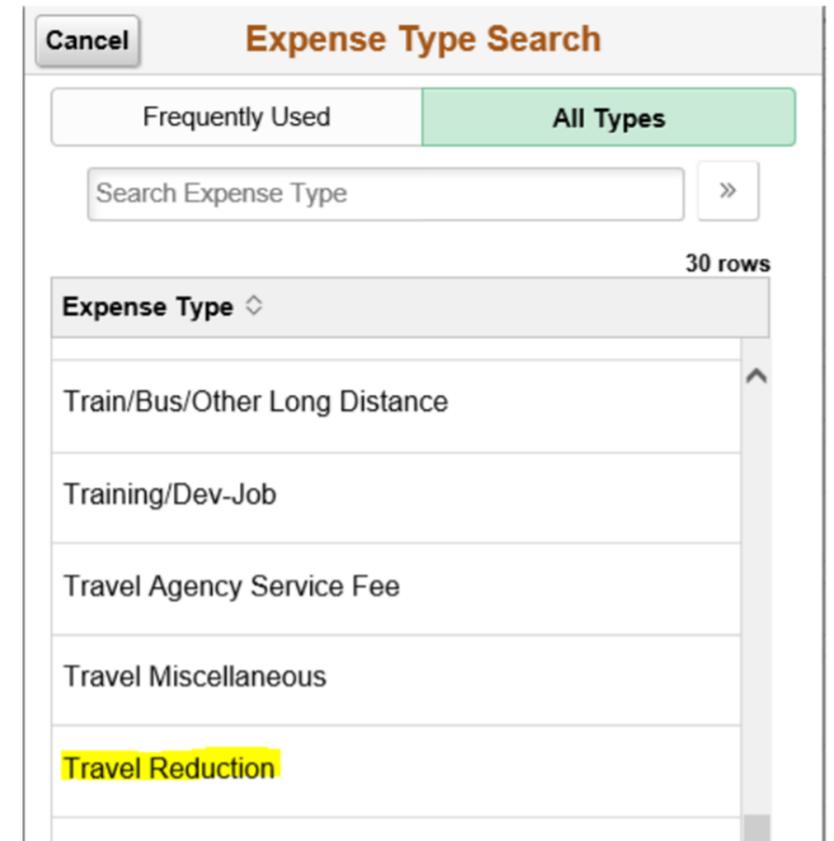
Cancel   **Expense Type Search**

Frequently Used   All Types

Search Expense Type   »

30 rows

Expense Type ◇

Train/Bus/Other Long Distance

Training/Dev-Job

Travel Agency Service Fee

Travel Miscellaneous

Travel Reduction

Travel Reductions

- The screen/image shown below will be displayed when a negative amount is entered for an expense line. The message is to notify and confirm that the traveler acknowledges that their reimbursement will be reduced.

- Travel Reduction [help](#) document

Resources

- [UW TravelWIse Website](#)
- [E-Reimbursement Login](#)
- [Administrative Groups](#)
- [Travel Policies](#)
- [UW Platt travel website](#)
- [Concur Login](#)

Agency transition – Travel Inc to Fox World Travel

Travel bookings managed by our required contracted vendor, Travel Incorporated, will be transitioned to Fox World Travel on July 1, 2024

Result of leadership's review and decision, based on feedback from travelers, arrangers, and administrators

- Quality of service; time to answer calls/emails
- Agent team make-up
- High number of complaints
- Improper international training

[Transition from Travel Incorporated to Fox World Travel | Travel (wisconsin.edu)](#)

*Travel Manager update

- Ann Brennan's final day April 10, 2024

- Alma Ramirez handling UW-Platteville until replacement hired

- Travel box – uwstraveloffice@uwsa.edu

- UW-Platteville Travel | Travel (wisconsin.edu) will be updated

Q&A

Thank you!