Welcome, 2024!

Agenda

• Basics of UW travel program
• How to's:
  • Book – Concur or with agents
  • Administrative Groups
  • Combine Business and Personal Travel
• Concur demo
• What's new?
• Resources and Q&A
UWL Travel Management Contact

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Managed Travel Program Goals

• Provide Duty of Care and Travel Risk Management for students, faculty and staff who travel on University business

• Obtain best prices through consolidated spend

• Act as an intermediary with vendors to ensure a smooth travel experience
Travel Program Overview

• All travel is booked through designated Agencies

• Concur is an online booking tool that is managed by Travel Incorporated

• Travelers have the option
  • book with a UW specific consultant
  • book in Concur

• TravelWise – great resource
• TravelWise Newsletter | Travel (wisconsin.edu)
<table>
<thead>
<tr>
<th>Links to information for:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Incorporated</td>
</tr>
<tr>
<td>Fox World Travel</td>
</tr>
<tr>
<td>Shorts Travel Management</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Employee Services</th>
<th>University Group Block Services</th>
<th>NCAA Athletics Services</th>
</tr>
</thead>
</table>
| Will be used for majority of travel not NCAA related and not part of a group block of 10 or more from the UW  
  • Individual travel (employees, guests, students) 
  • Administrative Groups | Must be used for all groups of 10 or more where:  
  • Attendees are flying together on the same flight which requires direct agreements with the airlines to set up | Must be used for all NCAA related travel (individuals and groups) |

| Dedicated Team Business Hours: 7 am CST-8 pm CST Monday-Friday, excluding Holiday | Dedicated Team Business Hours: 8 am CST-5 pm CST Monday-Friday, excluding Holiday | Dedicated Team Business Hours: 8 am CST-5 pm CST Monday-Friday, excluding Holiday |
BOOKING TRAVEL

Review the information below and consult with your supervisor to discuss the most logical method for your business trip. If you'd like further consultation, contact your campus travel manager.

<table>
<thead>
<tr>
<th>TRAVEL TYPE</th>
<th>BOOKING METHOD OPTIONS</th>
<th>PRIMARY VENDORS*</th>
<th>NON-PAYABLE OR REIMBURSABLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIR</td>
<td>• CONCUR</td>
<td>AMERICAN AIRLINES,</td>
<td>• BOOKED DIRECTLY WITH AIRLINE OR</td>
</tr>
<tr>
<td></td>
<td>• UW TRAVEL AGENCY</td>
<td>DELTA, SOUTHWEST, UNITED</td>
<td>• THIRD PARTY BOOKING SITES</td>
</tr>
<tr>
<td>CAR</td>
<td>• CONCUR</td>
<td>ENTERPRISE NATIONAL</td>
<td>• EXTRAS (I.E. GPS, FUEL SERVICE UPCHARGE)</td>
</tr>
<tr>
<td></td>
<td>• UW TRAVEL AGENCY</td>
<td>HERTZ (SECONDARY)</td>
<td>• VEHICLES LARGER THAN FULL SIZE (WITHOUT PROPER JUSTIFICATION)</td>
</tr>
<tr>
<td>LODGING</td>
<td>• CONCUR</td>
<td>PREFERRED HOTELS</td>
<td>• BOOKED WITH 3RD PARTY ONLINE BOOKING SITE (I.E. HOTELS.COM)</td>
</tr>
<tr>
<td>RAIL, UBER, LYFT</td>
<td>• DIRECTLY WITH VENDOR</td>
<td>NONE</td>
<td>• COST INEFFECTIVE USE OF SERVICE</td>
</tr>
<tr>
<td>TAXI, SHUTTLE</td>
<td></td>
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</table>

*USE OF A PRIMARY VENDOR IS NOT REQUIRED FOR REIMBURSEMENT OF AIR OR LODGING EXPENSES. USE OF ENTERPRISE/NATIONAL OR HERTZ WITH UW CONTRACT IS REQUIRED FOR CAR RENTALS. SEE MORE ON WISCONSIN.EDU/TRAVEL/BOOKING
Ways to make travel smoother

• Self-service options encouraged
  ✓ Use Concur for booking
  ✓ Use Travel Inc Hub for personal invoice retrieval
  ✓ Download mobile apps for airlines, hotels, etc
  ✓ Register for frequent flyer and hotel loyalty programs
• Consider alternate airports (Madison, Chicago, Minneapolis)
• Utilize Campus Travel Manager for assistance with policy, planning and booking questions
• Reconfirm flights
• Arrive at airport early
Policy Highlights - Air

- Must be booked with Designated Agency or in Concur to receive payment/reimbursement
  ✓ Booking with third party sites, such as Expedia.com, or directly on airline site is not reimbursable

- Preferred vendors are Delta, American Airlines, United, Southwest
  ✓ Other airlines are allowed to be booked

- Airfare can be paid with either a University P-card or a personal credit card

- Basic Economy fares are not shown on Concur. Must be requested in order to book that fare class
Notable Travel Policy Exceptions:

✓ International Flights with 8+ hours of consecutive airtime are eligible for Premium Economy seats

✓ Inter-Country flights purchased outside of the U.S. are exempt from Travel Inc. purchase mandate
Policy Highlights - Hotel

• Best Practice: book with a Travel Inc consultant or in Concur
  ✓ Exception: Conference hotels can be booked directly at the rate that the conference dictates

• Rates must be below the rate maximum, based on per-person
  ✓ Verify max rate for your location via Lodging and Per Diem Calculator

• Preferred hotels should be used whenever available
Policy Highlights - Ground

• Must be an authorized driver through Risk Management to drive on University Business

• Car Rental Contracts:
  ✓ Enterprise/National - Big Ten contract
  ✓ Hertz
  ✓ Book with a Travel Inc. Consultant or in Concur to get UW rates
  ✓ Never accept extras such as fuel service, GPS, Roadside Assistance, etc - not reimbursable
  ✓ Traveler is expected to refuel car prior to return – receipts required
  ✓ Preferred is to book standard, able to book up to midsize SUV if needed
Mileage Reimbursement

When driving your personal vehicle for University-sponsored business, you will be reimbursed for mileage. MapQuest or Google Maps are the official tools for determining the most direct route. The following rates apply:

- Fewer than 100 miles roundtrip - Standard Rate
  ✓ After 1/1/24: $0.67 per mile

- More than 100 miles roundtrip - Turndown Rate
  ✓ After 1/1/24: $0.43 per mile
Individual Meal Per Diems

- **Per Diem** is an allowance provided for individual meals and incidentals. No receipts required
  - The amount varies by location
  - This is provided for any overnight travel
  - Important to include conference documentation in expense reporting to document provided meals

- Day Trip Allowance is $15 (taxable) and provided for day trips
  - No receipts required
Tax Exemption

• **Wisconsin**
  ✓ The Wisconsin sales and use tax provides an exemption from payment of state, county, and local tax.
  ✓ Travelers seeking Wisconsin sales tax exemption for business lodging, meals, and vehicle rentals should present the Department of Revenue approved tax-exempt wallet card *(obtain your card from your institution’s business office)*

• **Other States**
  ✓ University of Wisconsin System may have various Sales and Use Tax Exemptions when making purchases other states. Review [UW TravelWIse](https://travelwisesite.org) for more details.

• If you are unable to receive an exemption, make note of reason on expense report
Want to add some personal time to a business trip? Drive to a far destination instead of fly?

After discussing with your supervisor, you may opt to add personal travel days on the beginning or end of your business trip. The University will only pay for costs associated with university sponsored travel. Either the traveler’s actual travel or comparison travel - whichever is less expensive – is payable/reimbursable.

Cost Comparison is needed at time of booking
• Show date/time stamp if using Concur
• Obtain email from Travel Inc
• Attach to TER
  • If Cost Comparison not obtained, Vice Chancellor approval needed

[Link: Combining Business and Personal Travel | Travel (wisconsin.edu)]
Administrative Groups

The Administrative Group process allows a host department to easily manage all department specific travel needs for students, guests or employees. The process allows the group administrator to either:

- Securely store a single University Purchasing Card on file with Travel Inc for agent reservations, or
- Set up the group for individual bill, where each traveler provides a personal credit card at the time of booking
Setting up an Admin Group

- Department arrangers must provide the following information and use the Travel Incorporated UW Group Reservation Request Form to submit the information:
  - ✔ Travel dates/times can be pre-defined (this is not required if not yet known)
  - ✔ Fare allowance
  - ✔ Approval requirements
  - ✔ If you want the card on file to be used for hotel guarantee (hold reservations for traveler’s own payment at check-out)
  - ✔ List of authorized users that are eligible to have their charges paid for via the card on file. This list may be modified as needed.

Once this process is complete, Travel Incorporated will provide the Administrative Group Code and contact information that must be given to and referenced by travelers or coordinators when booking under the established Administrative Group.

**Important Note:** It will take up to 48 business hours to have the group set up internally.
What is Concur

• the largest online booking tool used in North America
• the online booking tool utilized by the entire UW System
• the tool we use to house traveler profiles
• managed by our agency partner Travel, Inc
• Easily accessed through TravelWIse with SSO

Concur is not...

• a travel agency
• a place you can call/email for travel assistance
Benefits of Using Concur

• 24/7 access with no after-hours charges
• No hold time
• Saves money ($3.75 booking fee vs $18 for agent)
• Live inventory

When Concur should not be used

• Complicated International Trips
• Multi-city/multi-segment trips
• Conference hotels
• Companion traveler
• Personal travel
Concur Tips and Tricks

Adding a hotel or car to your trip
Concur Tips and Tricks
Identifying rate changes during a hotel stay

Rules and cancellation policy

Important Information:
RATE CHANGES OVER DURATION OF STAY

Hotel Rates
194.65 USD PER NIGHT STARTING 09 OCT FOR 1 NIGHT
246.65 USD PER NIGHT STARTING 10 OCT FOR 1 NIGHT
326.65 USD PER NIGHT STARTING 11 OCT FOR 1 NIGHT

Room rate details: All taxes/fees/surcharges included.
8.80% stateispers, 6.80% city tax per night.

Cancel by 07 OCT 2022 with no charge.
Concur Tips and Tricks

Initial Itinerary (Concur) vs Invoice Email (Travel, Inc)

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>Concur</td>
<td>Will not show the $3.75 charge and cannot be used for a TER.</td>
</tr>
<tr>
<td>Travel, Inc</td>
<td>Invoice email</td>
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</table>

*View Interactive Itinerary Online*

Univ of Wisconsin

This message confirms that your reservation has been processed. For changes, cancellations or questions please call the agency phone number on your itinerary.
Concur Tips and Tricks
Initial Itinerary (Concur) vs Invoice Email (Travel, Inc)
What's new?

- New Enterprise/National Big 10 contract
  - Rates have increased and $5 surcharge WI airports
  - Leisure use contract revised [Personal Use Contracts | Travel (wisconsin.edu)]
    - More fees for student renters
    - Hertz also primary
  - Concur SSO
- American Airlines no longer preferred
- Workday changes, summer 2025
  - First/last day per diem adjustments
  - Raising required receipt amount
  - Missing cost comparison – 80% reimbursement
• UW TravelWIse Website
• E-Reimbursement Login
• Policies
• Resources/Forms
• UWL travel website
• Newsletter Sign Up
• Concur Login & Demo
• Per Diem Calculator
Q&A

Thank you!