

# Travel Training

April 9, 2024

# Universities of Wisconsin Travel Contact\*

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# Agenda

- Basics of UW Travel program
- Travel & Expense policy
- How to's:
  - Book – Concur or with agents
  - Administrative Groups
  - Combine Business & Personal Travel
- Concur demo
- Upcoming travel agency transition
- Resources / News / Q&A



# 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





**Employee Services**

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

**University Group Block Services**

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

**NCAA Athletics Services**

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

Links to information for:

[Travel Incorporated](#)

[Fox World Travel](#)

[Shorts Travel Management](#)



# 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
- 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
- Basic Economy fares are not shown on Concur. Must be requested in order to book that fare class





# Policy Highlights - Air

## 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



# 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*



# 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 UW business
- Car Rental Contracts:
  - ✓ Primary - Enterprise/National - Big10 contract
  - ✓ Now also primary - Hertz
  - ✓ Book with a Travel Inc. Consultant or in Concur
  - ✓ Never accept extras such as fuel service, GPS, Roadside Assistance, etc. These are not reimbursable
  - ✓ Traveler is expected to refuel car prior to return –receipts required
  - ✓ Preferred is to book standard, able to book up to full size SUV if needed



# Mileage Reimbursement

When driving your personal vehicle for UW business, you will be reimbursed for mileage. MapQuest or Google Maps are the official tools for determining the most direct route.

- Fewer than 100 miles roundtrip - Standard Rate
  - ✓ After 1/1/24: \$0.67 per mile
- More than 100 miles, a fleet vehicle should be used
  - ✓ <https://uwplatt.sharepoint.com/sites/AdministrativeServices/FacilitiesManagement/SitePages/Car-Fleet.aspx>
  - ✓ Provide fleet non-availability slip if no fleet vehicle is available
  - ✓ Exception – Trips to an airport (can't park fleet vehicles at the airport)
- More than 100 miles roundtrip without using fleet - 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. [Per Diem Calculation \(wisconsin.edu\)](https://www.wisconsin.edu)
  - ✓ Amount varies by location
  - ✓ Provided for any overnight travel
  - ✓ Include conference documentation in expense reporting to indicate provided meals
- Day Trip Allowance is \$15 (taxable) and provided for day trips
  - ✓ No receipts required



# 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 use a department p-card on file with Travel Inc for agent reservations or;
  - ✓ To set up the group for individual bill, where each traveler provides a personal credit card at the time of booking.



# Administrative Groups

- 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:** *Set-up can take up to 48 business hours. Not advised if travel needs to take place within 20 days*





# 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

- ✓ UW travelers may have various Sales and Use Tax Exemptions when making purchases other states. Review [TravelWise](#) for more details.

**\*If you are unable to receive exemption, make note of reason why on expense report**



# Combining Business and Personal Travel

*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 or obtain email from Travel Inc
- Attach to eventual expense report

[Combining Business and Personal Travel | Travel \(wisconsin.edu\)](#)



# What is Concur

- The largest online booking tool used in North America
- The online booking tool utilized by entire UW System
- Tool we use to house traveler profiles
- Managed by our partner Travel Inc
- Easily accessed through TravelWise with single sign-on
- Loaded with UW discounts and policy rules

## Concur is not

- A travel agency
- A place you can call or email



# 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



# Access Concur on TravelWise



## App Logins

**Concur - UW's Online Booking Website**

**E-Reimbursement - Submit and Review Expense Reports**

**Lodging, Meal & Incidental Per Diem Calculator - Estimate Costs**

**Travel Incorporated Portal - View Trips and Air**

## Travel News

**Concur Outage**

*March 4, 2024*

**Travel Incorporated**

*February 9, 2024*

**SFS Branding Men**

# 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 \(wisconsin.edu\)](#)



# TRANSITION TIMELINE

Wednesday, June 26 Final day of booking in Concur with Travel Inc.

Thursday, June 27  
– Monday, July 1

Concur unavailable

Thursday, June 27  
– Sunday, June 30

Travel Inc. must be contacted for any immediate booking or support needs

Monday, July  
1

Fox World Travel must be contacted for any immediate booking or support needs

Tuesday,  
July 2

Concur is available under the new Fox World Travel configuration



# TRANSITION ITEMS

1. Use open ticket credits on file as soon as possible
2. Travel occurring during the transition dates of June 26 – July 1
  - Contact Travel Inc. if changes are needed through June 30th
  - Contact Fox World Travel if changes are needed on or after July 1st
3. Reservations booked with Travel Inc. before the July 1<sup>st</sup> transition date for travel on or after the July 1<sup>st</sup> Fox go-live date
  - All confirmed bookings will be transferred to Fox World Travel on July 1st. No action is required by the traveler/arranger
  - If any changes are required, Fox World Travel agents will have booking visibility and can assist
  - Trip name will be visible in Concur, but itinerary may not be, all changes must go through a Fox World Travel agent





# Transition webinars

- **March and April 17, 2024: Travel Program Update**
  - Overview of what is to come and high-level topics
  - The implementation process is underway with Fox World Travel
- **May and June 2024: New Non-Employee Booking Processes**
  - Replacing Administrative Groups
  - Dedicated session for current Administrative group leaders
- **June 2024: Traveler Transition Readiness Sessions**
  - Demo Fox-specific technology such as invoices, Fox Portal, past-date invoice retrieval, guest booking, flight monitoring, etc
- **July and August 2024: Open House/General Q&A Sessions**
  - Review any post-go-live topics that were identified as pain-points or particularly meaningful to travelers and admins
  - Provide open-forum time for attendees to ask general questions or request demos on specific topics/technologies

# Links

- [UW TravelWise Website](#)
  - [E-Reimbursement Login](#)
  - [Policies](#) (where to find)
  - [UW Platt travel website](#)
  - Travel News – [Newsletter Sign Up](#)
  - [Concur Login](#) & Demo
  - [Per Diem Calculator](#)
- 
- *Expense Training 4/9/24 at 2:00pm*



# \*Travel Manager update

- Ann Brennan's final day April 10, 2024
- Alma Ramirez handling UW-Platteville until replacement hired
- Travel box – [uwstraveloffice@uwsa.edu](mailto:uwstraveloffice@uwsa.edu)
- [UW-Platteville Travel | Travel \(wisconsin.edu\)](#) will be updated

Q&A

**Thank you!**

