



Travel Training

April 2, 2024



Agenda

- Basics of UW travel program
- How to's:
- Book – Concur or with agents
- Combine Business and Personal Travel
- Upcoming travel agency transition
- Resources, news 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 \(wisconsin.edu\)](#)



		
<p>Employee Services</p> <p>Will be used for majority of travel not NCAA related and not part of a group block of 10 or more from the UW</p> <ul style="list-style-type: none"> • Individual travel (employees, guests, students) • Administrative Groups 	<p>University Group Block Services</p> <p>Must be used for all groups of 10 or more where:</p> <ul style="list-style-type: none"> • Attendees are flying together on the same flight which requires direct agreements with the airlines to set up 	<p>NCAA Athletics Services</p> <p>Must be used for all NCAA related travel (individuals and groups)</p>
<p>Dedicated Team Business Hours: 7 am CST-8 pm CST Monday-Friday, excluding Holiday</p>	<p>Dedicated Team Business Hours: 8 am CST-5 pm CST Monday-Friday, excluding Holiday</p>	<p>Dedicated Team Business Hours: 8 am CST-5 pm CST Monday-Friday, excluding Holiday</p>

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
- 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



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





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](#) for more details.
- If you are unable to receive an exemption, make note of reason 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
- Obtain email from Travel Inc
- Attach to TER
 - **If Cost Comparison not obtained, Vice Chancellor approval needed**

[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



Attention UW Travelers and Arrangers:

On July 1, 2024, all individual travel services managed by UW's vendor Travel Incorporated will be transitioned to Fox World Travel. Prepare for the transition now and review the [agency transition webpage](#).



Contact

Travel Incorporated**Dedicated****Agency Hours:**

M-F 7 AM to 8 PM

CST

Phone: (877)

811-9898 or 470-

589-2205

*Afterhours Emergency Support Available**24/7/365*[Other Contracted Travel Agencies](#)

App Logins

[Concur - UW's Online Booking Website](#)[E-Reimbursement - Submit and Review Expense Reports](#)

Travel News

[Concur Outage](#)*March 4, 2024*

Special Topics

[Combined Business and Personal](#)

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 1st transition date for travel on or after the July 1st 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

- [UW TravelWise Website](#)
- [Transition from Travel Incorporated to Fox World Travel | Travel \(wisconsin.edu\)](#)
- [E-Reimbursement Login](#)
- [Policies](#)
- [Resources/Forms](#)
- [UW- La Crosse travel website](#)
- [Newsletter Sign Up](#)
- [Concur Login](#) & Demo
- [Per Diem Calculator](#)



*Travel Manager update

- Ann Brennan's final day April 10, 2024
- Becky Kopidlansky handling UW-La Crosse until replacement hired
 - Interim Co-Director of Travel Management Services
 - Bkopidlansky@uwsa.edu
- Travel box – uwstraveloffice@uwsa.edu
- [UW-La Crosse Travel | Travel \(wisconsin.edu\)](https://www.wisconsin.edu/uw-la-crosse/travel) will be updated

Q&A

Thank you!

