

# E-Reimbursement Training

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# UWSA Travel Contact\*

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## E-Reimbursement basics

- [E-Reimbursement resources](#) on UW TravelWise
- Expenses are submitted in a Shared Financial System (SFS), powered by PeopleSoft
- 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

The screenshot shows a dashboard with a red header bar containing the University of Wisconsin System logo, a 'Homepage' dropdown, and navigation icons. The main area is a grid of white tiles on a grey background. The tiles are: 'Expenses' (with icons for travel and lodging), 'Expense WorkCenter' (with a document and pencil icon), 'Travel Authorizations', 'Accounts Payable WorkCenter', 'Non-Expense Approvals' (with a document and checkmark icon), 'Per Diem Calculator' (with a globe icon), 'Billing WorkCenter', and 'Receivables WorkCenter' (with a person and computer icon). Two callout boxes with red borders and arrows point to the 'Expenses' and 'Expense WorkCenter' tiles. The left callout box contains the text: 'Travelers and alternates create and modify expense reports in the Expenses Tile'. The right callout box contains the text: 'Approvers and Auditors review expense reports in the Expense WorkCenter'. A large, faint watermark of the University of Wisconsin-La Crosse seal is visible in the bottom right corner.

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

**Approvers and Auditors review expense reports in the Expense WorkCenter**

# Creating Expense Reports

Walkthrough (this links back to UW Madison but it is a GREAT resource):  
[How to Create, Modify and Resubmit an Expense Reimbursement in e-Reimbursement – Division of Business Services – UW–Madison \(wisc.edu\)](#)

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



## Payment Types

Payment Types:

**Personal Funds** – out of pocket expenses which will be reimbursed.

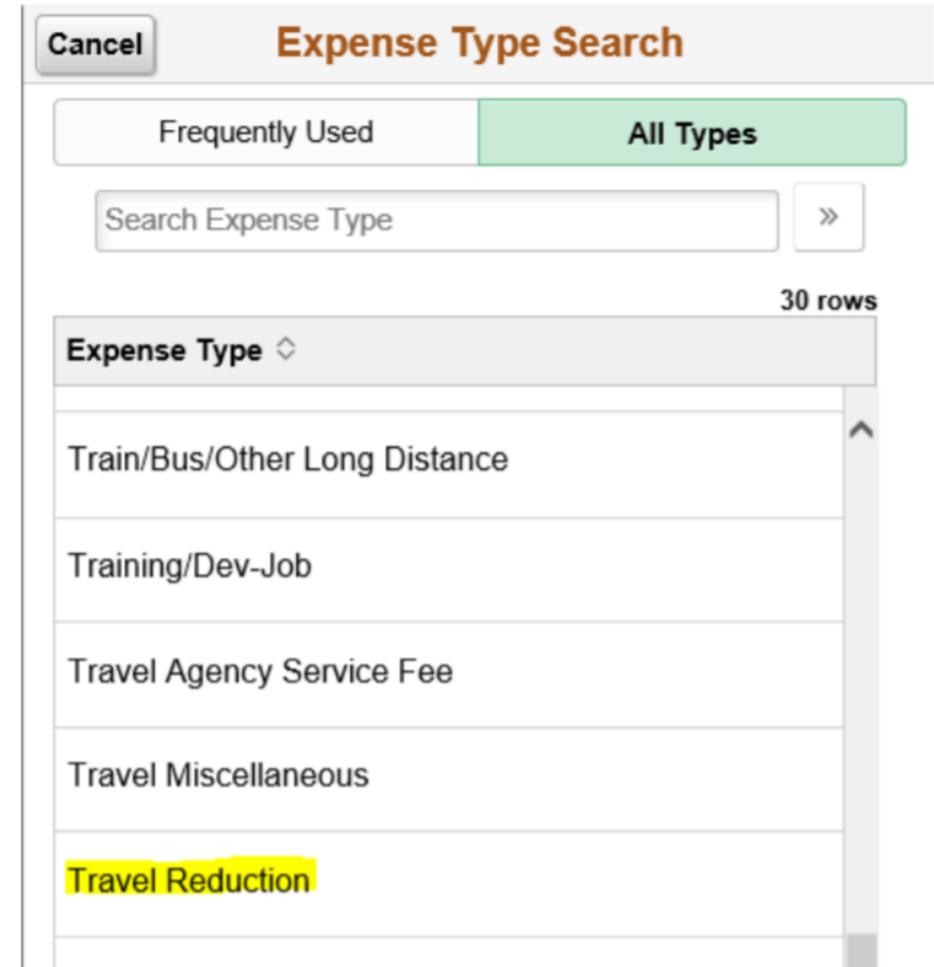
**Prepaid Purchasing Card**

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



# 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

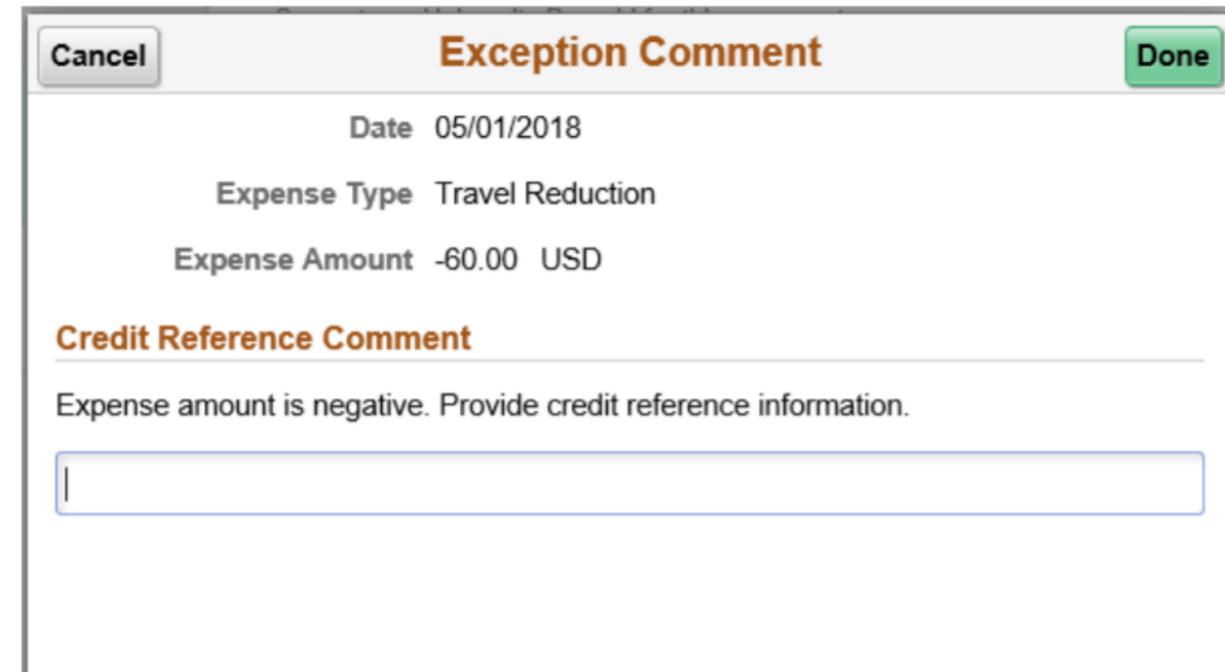


The image shows a screenshot of a web application interface titled "Expense Type Search". At the top left is a "Cancel" button. Below the title are two tabs: "Frequently Used" and "All Types", with "All Types" being the active tab. A search input field labeled "Search Expense Type" with a search icon is positioned below the tabs. To the right of the search field, it indicates "30 rows". Below this is a scrollable list of expense types, including "Train/Bus/Other Long Distance", "Training/Dev-Job", "Travel Agency Service Fee", "Travel Miscellaneous", and "Travel Reduction", which is highlighted in yellow.

Expense Type
Train/Bus/Other Long Distance
Training/Dev-Job
Travel Agency Service Fee
Travel Miscellaneous
<b>Travel Reduction</b>

# 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



Cancel **Exception Comment** Done

Date 05/01/2018

Expense Type Travel Reduction

Expense Amount -60.00 USD

**Credit Reference Comment**

Expense amount is negative. Provide credit reference information.

# 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
- Becky Kopidlansky handling UW-La Crosse until replacement hired
  - Interim Co-Director of Travel Management Services
  - [Bkopidlansky@uwsa.edu](mailto:Bkopidlansky@uwsa.edu)
- Travel box – [uwstraveloffice@uwsa.edu](mailto:uwstraveloffice@uwsa.edu)
- [UW-La Crosse Travel | Travel \(wisconsin.edu\)](https://www.wisconsin.edu/uw-la-crosse/travel) will be updated

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