



CANDIDATE TRAVEL TRAINING

February 18, 2026



UW TRAVEL TEAM INTRODUCTIONS

Elizabeth Dressel

Director of Travel Management Services



Alma Ramirez

Regional Travel Manager Supporting UW-Whitewater,
UW-River Falls, & UWSA



Alyssa Totoraitis

Regional Travel Manager Supporting UW-Milwaukee &
UW-Parkside



Tina Chorlton

Regional Travel Manager Supporting UW-Platteville



Emily Stoffel

Regional Travel Manager Supporting UW-Eau Claire,
UW-La Crosse, & UW-Stout

UW TRAVEL TEAM INTRODUCTIONS



AGENDA

- Booking options
- OTIB Form
- Airfare
- Lodging
- Car Rentals
- Mileage
- Meals
- Travel Disruptions
- Pro Travel Tips
- Candidate Reimbursement
 - EDES
 - Create Expense Report For...
 - Candidate Profiles
 - ECM



Why does candidate travel matter?

Anytime we use UW funding to pay or reimburse travel, all UW policies **MUST** be followed. Not following policy means the candidate does not receive reimbursement.

Providing clear instructions for candidates and timely processing of their reimbursements leaves a lasting positive impression of the Universities of Wisconsin.



BOOKING OPTIONS

The department books on candidate's behalf

- Arranger books in Concur using book for a guest feature
 - \$6/airline ticket
 - OR
- Arranger books for a guest by calling or emailing Fox World Travel
 - \$31.50/domestic airline ticket
 - \$41.50/international airline ticket
- Requires traveler's full legal name, date of birth, and gender
- Arranger can pay with UW card product or use temporary card (i.e. candidate's card)

Candidate arranges travel themselves following UW policy

- Arranger completes OTIBRF form allowing candidate to book with Fox and make their own arrangements
 - \$31.50/domestic airline ticket
 - \$41.50/international airline ticket
- Lodging & shuttles *can* be made directly with vendor. *Recommended UW arranger coordinates lodging*



ONE-TIME INDIVIDUAL BOOKING REQUEST FORM (OTIBRF)

- Normally only travelers with a Concur profile can work with Fox
- OTIBRF allows guests/non-profiled travelers to book directly with Fox
- Form found in [Fox World Portal](#)
- Used for airfare, hotel, and car rentals (not recommended for only hotel and/or car bookings)
- Requires travelers, name, email, general travel dates
 1. Travel arranger completes form
 2. Candidate receives an email with a code and travel details
 3. Candidate calls Fox, provides code, and books travel
 4. If approvals selected, arranger reviews and approves itinerary
 5. Travel arranger is emailed copy of itinerary and invoice



AIRFARE

- **MUST BE BOOKED WITH TRAVEL AGENCY**
- Recommended booking method: complete OTIBRF and allow candidate to book with Fox World Travel
 - Less work for arranger
 - Allows candidate to control booking and get the details correct
 - Avoids arranger having to gather personal information
 - Can use P-Card or allow candidate to pay for with own credit card
- Candidates traveling from international locations may have additional procedures/nuances
- Travel Agency fees:
 - Fox World Travel Domestic flight (fee if using OTIB): \$31.50/ticket
 - Fox World Travel Int'l flight: \$41.50/ticket
 - Concur: \$6/ticket



AIRFARE CANCELLATIONS

- UW policy requires travelers book non-refundable tickets
- When a cancellation is necessary, contact Fox or cancel in Concur
- A credit will be available under the traveler's name with the airline for use on a future flight
- If candidate paid for airfare and was not reimbursed, they can personally use this credit by calling Fox OR we can reimburse and use the value for a UW trip
- If UW paid, credit can be utilized for another business trip or by someone else. Rules vary based on airline. Name changes are sometimes an option, though sometimes have a fee
- [Unused Ticket Credit Guidance](#)



COST COMPARISONS

- Don't apply to guests/non-employees
- Final approval is up to Worktag manager



LODGING

- Allowed booking methods: in Concur, with Fox World Travel, or directly with hotel
- No agency fees for hotel only bookings in Concur or with agent
- Recommended booking methods:
 - Arranger books directly with hotel
 - Arranger books in Concur using 'Book for a Guest'
 - OTIBRF (if also booking airfare)
- Must be at or below nightly max rate as found in [Per Diem Calculator](#)
- Credit Card Authorization Form (from hotel) required for UW to pay for hotel. Traveler will need to present card for incidentals
- Arranger should work directly with the hotel for tax exemption. Hotels can deny tax exemption if not paid using a UW credit card



LODGING CANCELLATIONS

- Cancellation policies vary based on the hotel, room rate selected, and the applicable cancellation deadline
- Best practice to call hotel to cancel if within 24 hours of stay
- Cancellation fees may be eligible for reimbursement, subject to Worktag Manager review and approval



CAR RENTALS

- Must utilize UW contracts with National/Enterprise or Hertz
- No agency fees for car only bookings in Concur or with agent
- Recommended booking methods:
 - Use Concur 'book for a guest' function
 - Call or email Fox World Travel
 - OTIBRF (if also booking airfare)
- Traveler has to pay for rental and present credit card at pick-up, unless utilizing a direct bill
- Advise travelers to have Fox itinerary available at pick-up. If any contract issues arise with the vendor, traveler should still take the vehicle and arranger can contact the travel manager.
- No add-ons such as car seats, GPS, etc. are reimbursable
- Reimburse rental cost and gas
- Traveler should refuel before returning vehicle



CAR RENTAL CANCELLATIONS

- If within 24 hours of rental, good idea to call rental location
- Can cancel in Concur



MILEAGE

- Reimbursed standard rate for miles driven using personal vehicle
- Can reimburse from home to airport
- Can reimburse 2 round trips for someone to drop them off at the airport
- Any employee driving candidates MUST be an authorized driver
- Driver authorization not required for non-employee candidate



MEALS

Hosted Meal

- Meals where UW employee is paying for job candidate's meal
- Your campus may require pre-approval and may limit the number of UW employees who can attend a hosted meal
- One employee should pay for traveler and other allowed attendees
- Meals in WI should be tax exempt
- Must stay within allowed amount per person; overages are allowed on gift or foundation funds (new as of July 2025)

Meals while traveling

- Reimbursed as per diem after travel is complete for overnight trips
- Receipts not required for per diem
- Hosted meals should be marked as provided meals



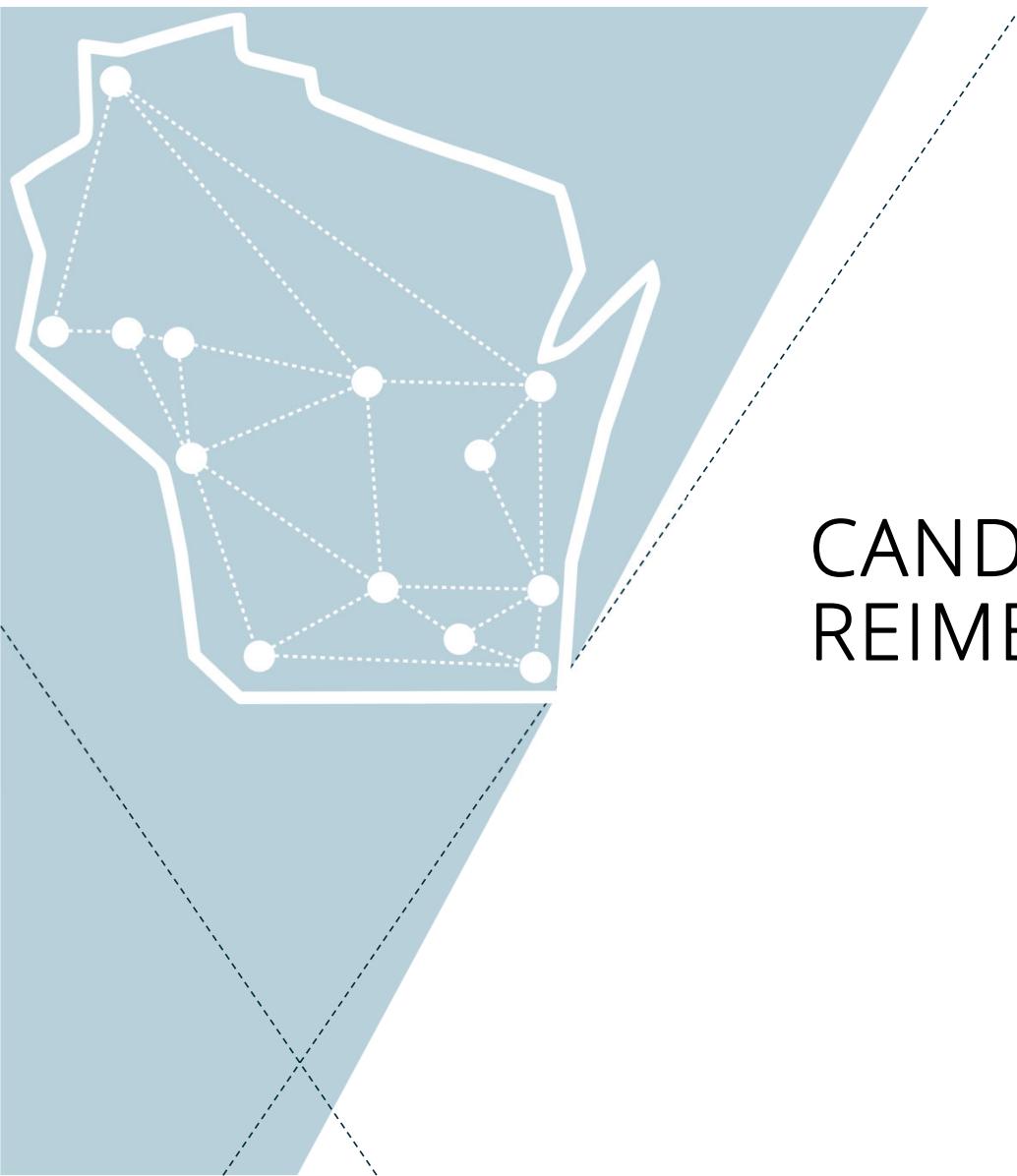
TRAVEL DISRUPTIONS

- Airfare disruptions are common
 - For disruptions while in travel status, travelers should work with the airline help desk while calling Fox World Travel
 - For disruptions prior to travel, arranger or traveler can contact Fox
 - When new flights are not available, rental cars are an option



PRO-TRAVEL TIPS

- Candidates should always bring a physical credit card
- Carry a government-issued photo ID (Real ID or Passport for flights)
- Keep digital copies of the itinerary (hotel confirmation, flight details, campus directions) on your phone for quick access incase vendors question use of UW contracts
- Arrive early for airport check-in to allow time for security lines, especially if traveling during peak hours.
- Save receipts related to travel expenses for reimbursement, including transportation, parking, and baggage
- Provide candidates with an after-hours on-campus contact while they are in travel status



CANDIDATE REIMBURSEMENT



EXPENSE DATA ENTRY SPECIALIST (EDES)

- To create reports for others and to request External Committee Members, employee must have the Expense Data Entry Specialist (EDES) role
- Search for Create Expense Report in Workday. EDES will see Create Expense Report for Worker, Non-Worker, Pre-hire. Non-EDES will only see Create Expense Report
- Request role from your campus. Some campuses may have set process for role requests



CREATE EXPENSE REPORT FOR...

- If candidate is non-employee:
 - Use Create Expense Report for Non-Worker
 - Payee Type = Candidate OR External Committee Member is recommended, might be phasing out Candidate type
- If candidate is employee of your institution:
 - Use Create Expense Report for Worker
- If candidate is employee at other UW institution
 - You will not be able to create a report on their behalf
 - They will need to create report for themselves
 - Ensure they have the correct funding information and that they enter the correct Company when they start the report (campuses cannot be changed once the report is started)



IF YOU USE CANDIDATE PROFILES IN WORKDAY

- Candidates are a separate "People" type in Workday
 - Other types include Employee and External Committee Member
- Use the Create Expense Report for Non-Worker and select Payee Type = Candidate to search
- Helpful to know C number
- Work with HR to ensure address is correct in candidate profile
- If unable to find candidate, request an External Committee Member



EXTERNAL COMMITTEE MEMBER (ECM)

- Non-employees can be reimbursed using an External Committee Member profile
- ECMs must be requested via Workday
- Requires First & Last Name, Mailing Address (where reimbursement check will be sent), and Phone Number or Email
- Recommended to utilize ECM's to reimburse candidates



RESOURCES

- [UW Travel Policy Guide for Guests](#)
- Video: [How to book for a guest in Concur](#)
- [Job Aid- One Time Individual Booking Request Form \(OTIB\)](#)
- [Job Aid: Request to Create or Request an Update to an External Committee Member](#)
- [Job Aid: Create Expense Report for Non-Worker](#)