NEW NON-EMPLOYEE BOOKING PROCESS
(REPLACEMENT FOR ADMINISTRATIVE GROUPS)
MAY 22, 2024
INTRODUCTIONS

UW Team
- **Elizabeth Dressel** - ATP Expenses Design Team Co-Lead & Co-Director of Travel
- **Becky Kopidlansky** - Interim Co-Director of Travel
- **Terry Wilson** - Travel Manager, UW Madison
- **Alma Ramirez** - Regional Travel Manager
- **Alyssa Totoraitis** - Regional Travel Manager

Fox World Travel Team
- **Wanda Burdick** - Director of Operations
- **Kayla Kitchner** - Client Solutions Manager
- **Kelly Kuebli** - Operations Manager, Higher Education Team
AGENDA

• Housekeeping & Introductions
• Retirement of Administrative Groups
• Timeline for Retirement of Administrative Groups
• Communication to Travelers
• Fox World Travel Contact Information
• Options for booking non-employee/guest travel
• Fox World Travel Demo of One-time Individual Booking Request Form
  • This form will replace the Administrative Group Process
• Customization Beyond the One-time Individual Booking Requests Form
• Anticipated Transition Challenges
• Looking ahead to exciting changes for UW Travel
• Upcoming Travel Agency Transition Trainings & Transition Specifics
RETIREMENT OF ADMINISTRATIVE GROUPS

With the transition to Fox on July 1st, all current Administrative Groups will be discontinued

- Factors that lead to the decision to retire administrative groups and create a new process for guest/non-employee travel
  - Administrative burden
  - Labor intensive for agency
  - Led to many errors by Travel Inc agents
  - Decreased satisfaction of UW travel program
  - Grew to over 1,000 groups system-wide and became unmanageable
  - 85% of all admin groups have less than 10 travelers
  - Time consuming process for a small number of travelers per group
  - Open risk for fraudulent bookings
  - Being used for unintended purposes
### TIMELINE FOR RETIREMENT OF ADMIN GROUPS

<table>
<thead>
<tr>
<th>Date Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now - Friday, May 31</td>
<td>• Business as usual</td>
</tr>
<tr>
<td>Friday, May 31</td>
<td>• Final day to request/set-up a <strong>new</strong> Administrative Group with Travel Inc</td>
</tr>
<tr>
<td>June 1-June 30</td>
<td>• New bookings can be made with <strong>existing</strong> Admin Groups that were set up with Travel Inc. prior to May 31, 2024</td>
</tr>
<tr>
<td></td>
<td>• If you do not have an administrative group, non-employee bookings will have to be done in Concur using ‘book for a guest’ functionality or by the admin/UW employee calling Travel Inc to book on behalf of the guest</td>
</tr>
<tr>
<td>Sunday, June 30</td>
<td>• Last day to book using an Administrative Group Code including approval process</td>
</tr>
<tr>
<td></td>
<td>• Last day of booking with Travel Inc.</td>
</tr>
<tr>
<td>Monday, July 1</td>
<td>• First day of booking with Fox World Travel</td>
</tr>
<tr>
<td></td>
<td>• One-time Individual Booking Request Form (process replacing Administrative Groups) will be available with Fox World Travel</td>
</tr>
</tbody>
</table>
PAY ATTENTION!

THIS STUFF IS IMPORTANT!
VITAL TRANSITION INFORMATION FOR ADMINS

With the discontinuation of Administrative Groups, group specific information will **NOT** transfer to Fox with reservation data.

This includes:
- Payment information
- Group policies/parameters
- Approver information
- Approval process requirements

Whenever possible, we recommend holding off on making new Admin Group bookings with Travel Inc, for travel July 1st and beyond.

We understand this won’t always be feasible, which is why communicating with admin group travelers about the upcoming changes will be crucial.
COMMUNICATION TO TRAVELERS (FROM UW TRAVEL TEAM)

On Monday, July 1, 2024, Universities of Wisconsin Travel Team will send communication to all travelers with a reservation that is transitioning from Travel Inc to Fox

Communication will include:

• Announcement of UW Travel Agency transition from Travel Incorporated to Fox World Travel
• Details regarding transition of Travel Inc booked reservations to Fox World Travel
• Instructions to contact Fox World Travel for support or changes to existing booking
  • A credit card and CVV code will need to be provided to Fox for any change that results in a fare increase
  • Travelers should be instructed (by their admin group leader) how changes to Travel Inc booked reservations will be handled
• Fox World Travel Business Hours and Contact Information
COMMUNICATION TO TRAVELERS (FROM ADMIN GROUP LEADER)

We highly recommend that Admin Group leaders contact travelers who will be in travel status during the transition period or that have future travel booked through an Admin Group code, and alert them of the change to Fox.

Additional information to consider/provide:

• Fox World Travel will support Travel Inc booked reservations after July 1, 2024, however:
  • Fox will have to work directly with the airline to make changes. Please allow additional processing time on these reservations.
  • Changes that result in a fare increase, will require someone to provide a credit card + CVV code at the time the change is made. Credit card data from Travel Inc will not be available to Fox World Travel agents.
COMMUNICATION TO TRAVELERS (FROM ADMIN GROUP LEADER)

• Admin Group leaders must decide how to handle post-transition changes to airline tickets that result in a fare increase and communicate this with your travelers
  • Option 1: Traveler pays for changes
    • Advise traveler to provide their credit card to Fox for any changes. UW may reimburse traveler through an expense report
  • Option 2: Admin Group leader/UW credit card holder pays for changes
    • Admin group leader/credit card holder would need to be alerted of changes and contact Fox to provide credit card information
FOX CONTACT INFO

Fox Employee Service/Individual Travel contact information:
Local: 608-710-4172
Toll Free: 844-630-3853
Email: UWtravel@foxworldtravel.com

Fox Group Block contact information:
Local: 920-933-4180
Email: foxgroupblock@foxworldtravel.com

*Phone/email will not be live until July 1st. Until then, there will be a recording that directs travelers back to Travel Inc.
Initially, there will be 3 options for booking guests, students and other non-employee travel

1. **Coordinator books** in Concur using ‘Book for a guest’ functionality
2. **Coordinator books** on behalf of guest by calling Fox
3. **Traveler books** directly with Fox after coordinator authorizes booking through *One-Time Individual Booking Request Form*
   - This process is the replacement for Administrative Groups

If you decide that none of the above options fit your needs, a paid custom solution may be available in the future

4. **Traveler books** directly with Fox after coordinator establishes a *Custom Booking Solution (CBS)*
   - Requirement to provide a business case as to why it is needed
   - Annual fee starting at $120, to develop, set-up, and maintain
OPTIONS FOR BOOKING GUEST/NON-PROFILED TRAVELERS

1. **Coordinator books** in Concur using ‘Book for a guest’ functionality
   - Lowest cost option!
     - Online fee = $6.00 for a domestic or international reservation
   - This functionality exists today with Travel Inc and is available to all employees with Concur profiles
   - Should be used when coordinator wants to book online on behalf of the guest
   - This is the only option to book non-employee travel online
   - Coordinator must collect and enter all information from the traveler, including full/legal name, DOB, gender, cell # and email, prior to making the booking
   - A credit card would have to be entered at the time of booking if not already stored in Coordinator’s Concur profile
2. **Coordinator calls Fox to book on behalf of guest**
   - Coordinator must have their own Concur profile to be able to call Fox to book.
   - This method should be used when the coordinator wants to book for the traveler and the traveler would not have any contact with Fox.
   - Coordinator must collect all information from the traveler, including full/legal name, DOB, gender, cell # and email, prior to calling Fox to book the trip.
   - A credit card would have to be provided at the time of booking.
   - Email confirmation is sent to both coordinator and traveler.
   - **Service fees**
     - $31.50 per ticket for a domestic agent booking.
     - $41.50 per ticket for an international agent booking.
3. One-Time Individual Booking Request Form

- Coordinator completes request form to authorize Fox to work directly with Traveler
- Traveler receives email notification advising them to contact Fox to book trip
  - A booking code is provided in the email that traveler will reference when calling
  - Traveler has 21 days to complete reservation from time of form submission
- Coordinator has option to require pre-ticketing approval
- Coordinator can monitor process via Fox Portal Dashboard
  - Fox Portal is like the Travel Inc Hub
    - Will replace Travel Inc Hub
    - Will be accessible via Single Sign-on (SSO)
    - Will house one-time individual booking request form
    - Approvals dashboard access
    - Invoice retrieval will be available
- Coordinator receives copy of final eInvoice
- Service fees for using the form are the same as all other individual reservations
  - $31.50 per ticket for domestic reservations
  - $41.50 per ticket for international reservations
- Fox will review process shortly
FOX DEMO OF ONE-TIME INDIVIDUAL BOOKING REQUEST FORM
ONE-TIME INDIVIDUAL BOOKING REQUEST FORM

After clicking on ‘Travel Requests’ from the Fox Portal Homepage you will be brought to the One-Time Individual Booking Request Form, to create a new travel request.

Please note the 4 options available in the upper right-hand corner of the request form.
Make sure to read and understand the disclaimer section at the bottom of the request form.
FOX PORTAL TRAVEL REQUESTS DASHBOARD

The Fox Portal will give you access to:
• Travel Request Dashboard so you can keep track of pending requests
• New travel requests using the One Time-Individual Booking Request Form
• Invoice search tool
• Approvals Dashboard to keep track of itineraries that required approval
Like the current Travel Inc Invoice Search tool, the new Fox Invoice Search tool will also allow you to access any UW reservation with either a Fox Record Locator or a 10-digit ticket number.
Booking Request Dashboard will help you keep track of your pending & booked travel request. It will also allow you to resend the request email (on next slide) to your travelers.
Following submission of the One-Time Individual Travel Request Form, an email will be sent to the coordinator and the traveler with the details of the request, as well as instructions for the traveler on next steps.

Attention Katie Dahl,

A travel request has been submitted for your upcoming UW System Administration trip.

To finalize and confirm your trip arrangements, please contact Fox World Travel by phone, 844-636-1853 or 866-710-4172, or by email, ewtravel@foxworldtravel.com, at your earliest convenience.

You will need to provide the agent with the following trip confirmation code: 7XD SJ7.

Please review the information below in regard to further details about your submitted travel request.

Traveler Information
- Guest Traveler Name: Katie Dahl
- Guest Traveler Mobile: 608/123/456
- Guest Date of Birth: See Reservation Details
- Guest Cell Phone: 608/123/456
- Additional Comments: Specific notes

Itinerary Information
- Departure Airport: MSN
- Destination Airport: EWR
- Departure Date: 06/16/2024
- Destination Date: 06/18/2024

Coordination Information
- Coordinator Name: Kelly Kuehbi
- Coordinator Email: 608/123/456
- Coordinator Phone: kukehbi@foxworldtravel.com

Policy Information
- Is guest allowed to make changes once booked: No
- Additional payment for any applicable airline change fees: No
- Will traveler is allowed flexibility in booking dates/airports: No

Approver Information
- Approver Name: Kelly Kuehbi
- Approver Email: 608/123/456
- Approver Phone: kukehbi@foxworldtravel.com

Travel request will remain active for 24 days. If no action is taken within 24 days, a new request will need to be submitted by the travel coordinator.
Approver will receive pre-ticket itinerary. Click on link to go to the dashboard and approve reservation within 24 hours.

Note: Approval email will have cost of ticket listed, just not visible on screenshot.
After changing status to ‘Approve’ and clicking ‘Submit’ the ticket will be issued automatically. If approval status is ‘changes requested’, email message will be sent to agent team.

Airfare cannot be guaranteed until the ticket is purchased. Delays can cause airfare to increase.
This dashboard is used for informational/view only purposes. Tickets must be approved via the email notification.
RECAP OF ONE-TIME INDIVIDUAL BOOKING REQUEST FORM

One-Time Individual Booking Request Form is the replacement for the current Administrative Group process. Below is an outline of some of the similarities and difference between the new Fox form, and the current Administrative Group process.

Similarities
• Can accommodate non-employee/guest, students, or employees
• Optional approval process
• Option for traveler to pay
• Allows Admin/requester to set booking parameters

Differences
• A new form must be completed/submitted for each travel request
• 1 form = 1 trip request
• Credit card will not be kept ‘on file’, the card will need to be entered on each form.
• If not approved (by approver) within 24-hours of traveler making reservation, a new request form will have to be submitted (by the admin) and the process will start over.
FUTURE CUSTOMIZATION BEYOND THE FORM

• Custom Booking Solution (CBS) is on hold and will not be available on July 1st
  • We want everyone to try the One-Time Individual Booking Request Form for at least 3 months post go live
  • The form is the replacement for Administrative Groups
  • We believe the form will be able to accommodate 95% + of all current Admin Groups

• If you find that the form is not meeting your needs, you can reach out to your campus travel manager and make a business case for developing a CBS for your travelers.
  • Development, set-up, and maintenance of a CBS will cost a minimum of $120 annually
  • Additional fees may apply for CBS policy administration
## SERVICE FEE CHANGES

<table>
<thead>
<tr>
<th>Fee Type</th>
<th>Fox Fee Model - 2024</th>
<th>Travel Inc Fees (Current)</th>
<th>Fox Fees prior to July 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online Domestic</td>
<td>$6.00</td>
<td>$3.75</td>
<td>$8.25</td>
</tr>
<tr>
<td>Online Int’l</td>
<td>$6.00</td>
<td>$3.75</td>
<td>$18.25</td>
</tr>
<tr>
<td>Online car/hotel only</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$4.00</td>
</tr>
<tr>
<td>Cancellation of online booking by agent</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$10.00</td>
</tr>
<tr>
<td>Agent Touch Fee</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$10.00</td>
</tr>
<tr>
<td>Agent Domestic</td>
<td>$31.50</td>
<td>$18.00</td>
<td>$25.00</td>
</tr>
<tr>
<td>Agent Int’l</td>
<td>$41.50</td>
<td>$18.00</td>
<td>$32.00</td>
</tr>
<tr>
<td>After-Hours</td>
<td>$20.00</td>
<td>$18.00</td>
<td>$15.00</td>
</tr>
</tbody>
</table>

Custom Booking Solution (CBS) Annual Set-up* additional fees may apply.

$120.00 minimum, N/A N/A

*Custom Booking Solution is not currently available and will be developed based on need.

### UW Overall (Systemwide) Transaction Type

<table>
<thead>
<tr>
<th>% of Transactions</th>
<th>Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>60.5%</td>
</tr>
<tr>
<td>Agent Domestic</td>
<td>29%</td>
</tr>
<tr>
<td>Agent Int’l</td>
<td>10.4%</td>
</tr>
</tbody>
</table>

### Group Block Air Ticket Transaction

- **Group Air sourcing and pre-ticketing**
  - $205.00

- **Non-Air Sourcing Fee**
  - Nonrefundable sourcing fee paid when sourcing is requested.
    - $100.00

- **Employee Travel Services Unused Ticket Exchanges**
  - Each domestic airline ticket issued or exchanged directly with an agent.
    - $51.00
  - Each international airline ticket issued or exchanged directly with an agent.
    - $65.00
  - Fox Emergency Service per call surcharge.
    - Hours: 7:30am – 7:00pm CST, holidays and weekends.
    - $30.00
  - Per void, refund or cancellation.
    - $15.00

*Paid as a fee each time sourcing is requested. If group is ticketed, sourcing fee can either be applied against ticketing fees or refunded. If group is not ticketed, the sourcing fee is nonrefundable.

Airline sourcing quotes expire at varying times (based on carrier policy), typically between 30-45 days from the initial quote. If quote expires prior to confirming group and a new sourcing is requested, an additional $205 sourcing fee will be charged.
ANTICIPATED TRANSITION CHALLENGES

• Unused ticket utilization
  • Encourage travelers to rebook unused ticket credits prior to July 1st transition date – easiest option!
  • Travel Inc agreed to support unused tickets for 3 months post transition for a higher service fee – not ideal
  • No ability to use/access unused ticket (regardless of airline expiration date), after September 30, 2024

• Active reservation transfer

• Administrative Group process replacement
LOOKING AHEAD TO EXCITING CHANGES

• Agency support improvements
  • Dedicated Fox agents that support Concur
  • Dedicated higher education team
  • Designated international agents and international review team
  • On-demand chat in Concur with Fox’s technical support or agent teams

• Replacement to the Administrative Group booking process
  • New “One-time Individual Booking Request Form”
  • New dashboard for administrators to manage their individual booking requests
FOX TRANSITION – WEBINARS/TRAININGS

• **May and June 2024: New Non-Employee Booking Processes**
  - One-time Individual Booking Request Form (option for booking for employees as well as guests)
  - 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 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

• **September 2024: Back to school/back to travel sessions**

*To register for transition sessions, visit [UW TravelWIse Agency Transition webpage](#)
REMINDERS: TRANSITION SPECIFIC

1. Encourage travelers to use open/unused ticket credits on file as soon as possible
   • Round 1 of emails have been sent
   • UW Travel Team will send out a 2nd round of emails in late May
   • Review of Open Ticket Guidance

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/coordinator
   • 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
THANK YOU FOR ATTENDING