NEW NON-EMPLOYEE BOOKING PROCESS
(REPLACEMENT FOR ADMINISTRATIVE GROUPS)
JUNE 6, 2024
INTRODUCTIONS

UW Team

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• Terry Wilson - Travel Manager, UW Madison
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Fox World Travel Team

• Wanda Burdick – Director of Operations
• Kayla Kitchner – Client Solutions Manager
• Kelly Kuebli – Operations Manager, Higher Education Team
AGENDA

Current state of Admin Groups, transition timeline and communications

Admin Group replacement overview and use cases

Fox World Travel Demo of One-Time Individual Booking Request Form

Fox World Travel Demo of Custom Booking Solution

Recap and Considerations
RETIREMENT OF ADMINISTRATIVE GROUPS ON JULY 1, 2024

Factors that lead to the decision to retire admin groups and create a new process for non-employee travel:

- Unconstrained concept of administrative groups led to ballooning of program and contributed to inability of Travel, Inc. to support groups successfully
  - 1,399 active Admin Groups (System-wide)
  - 490 used in the last 12 months
  - Of those 490 groups, 97 groups had more than 20 travelers
- Major source of ticketing errors and customer service failures due to complexity of administrative group requirements
- The current structure of administrative groups has an untenable level of risk exposure for fraudulent bookings

Vision with the new structure: To offer two options that meet the majority of traveler and travel coordinator needs, within reasonable constraints and a clear guiding framework that Fox World Travel is able to support, while lowering the risk exposure for fraud for both the university and the agency.
TIMELINE FOR RETIREMENT OF ADMIN GROUPS

Friday, May 31
• Was the final day to request/set-up a new Administrative Group with Travel Inc.

June 1-June 30
• New bookings can be made with existing Admin Groups that were set up with Travel Inc. prior to May 31, 2024
• 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

Sunday, June 30
• Last day to book using an Administrative Group Code including approval process
• Last day of booking with Travel Inc.

Monday, July 1
• First day of booking with Fox World Travel
• Replacement processes (discussed shortly) will be available with Fox World Travel
PAY ATTENTION!

THIS STUFF IS IMPORTANT!
VITAL TRANSITION INFORMATION FOR ADMINS

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

**Reservation information that will not transfer:**
- Payment information
- Group policies/parameters
- Approver information
- Approval process requirements

We recommend holding off on making new bookings with Travel Inc, for travel that is occurring after the transition date of July 1, 2024, whenever possible.

We understand this won’t always be an option, which is why communicating with your travelers about the upcoming changes is crucial.
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
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.
• 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.
OPTIONS FOR BOOKING GUEST/NON-PROFILED TRAVELERS

Concur Online Booking
- $6.00 per ticket
- Coordinator books in Concur using “book for a guest” functionality

Fox Agent Booking
- $31.50 domestic
  - $41.50 int’l
- Coordinator calls Fox to book on behalf of guest

One-Time Individual Booking Request
- $31.50 domestic
  - $41.50 int’l
- Traveler books directly with Fox after coordinator authorizes

Custom Booking Solution (CBS)
- $120+ set-up
  - $31.50 domestic
  - $41.50 int’l
- Multiple travelers book with Fox after establishing custom group
**OVERVIEW**

<table>
<thead>
<tr>
<th>Individual Booking Form</th>
<th>Custom Booking Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-off reservation requests or low volume over time</td>
<td>Managed ticketing and policy for 20 or more travelers</td>
</tr>
<tr>
<td>Entirely automated; Immediately creates a booking request and avoids CBS set-up fees</td>
<td>Complex travel within a defined start and end date</td>
</tr>
<tr>
<td>The traveler will work with the travel agency directly to book based on the parameters of the individual request</td>
<td>Each traveler books their ticket individually, while adhering to a custom policy</td>
</tr>
<tr>
<td>Examples include guest speaker travel, interviewee travel, individual student travel</td>
<td>Examples include graduate school recruiting events, board meetings, conference travel</td>
</tr>
</tbody>
</table>
FOX DEMO OF ONE-TIME INDIVIDUAL BOOKING REQUEST FORM
ONE-TIME INDIVIDUAL BOOKING REQUEST FORM - AIDES
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.
ONE-TIME INDIVIDUAL BOOKING REQUEST FORM - DISCLAIMERS

Make sure to read and understand the disclaimer section at the bottom of the request form.

Disclaimer:

Travel request will remain active for 21 days. If no action is taken within 21 days, a new request will need to be submitted by the travel coordinator.

There are no options for approvals once travel has started. Fox will always attempt to accommodate travelers during disruptions. By submitting this form, you are agreeing to additional charges that may occur while the traveler is in travel status.

- Approval is required within 24 hours
- Airfare is not guaranteed until approved and ticketed
  - If airfare is greater than 5% increase, a new reservation will be created and sent for approval
- If approval is not received within 24 hours, requester must submit a new reservation
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.
TRAVEL REQUEST EMAIL

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 866-710-4472, or by email, ewtravel@foxworldtravel.com, at your earliest convenience.

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

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: 608/236/8080
- Guest Date of Birth: See Reservation Details
- Guest Cell Phone: 808/212/8808
- Additional Comments: specific notes

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

Coordination Information
- Coordinator Name: Kelly Kuehbl
- Coordinator Email: 608/236/0085
- Coordinator Phone: kleubbl@foxworldtravel.com

Policy Information
- Is guest allowed to make changes once booked? No
- Authorized payment of any applicable airline change fees: No
- Traveler is allowed flexibility in booking around dates/airports: No

Approver Information
- Approver Name: Kelly Kuehbl
- Approver Email: 608/236/0085
- Approver Phone: kleubbl@foxworldtravel.com

Travel request will remain active for 21 days. If no action is taken within 21 days, a new request will need to be submitted by the travel coordinator.
APPROVAL EMAIL

Approver will receive a 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 at the bottom.
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.
CUSTOM BOOKING SOLUTION - AIDES

Note: ‘How to’ documents/job aides are still being developed and following CBS slides are working drafts of what the final product will look like.
Click on ‘Request New Group’ and complete form to set up Custom Booking Solution (CBS)
Under Service Type, select Custom Booking Solution. Then click the green ‘SUBMIT’ button.
The ‘Manage My Groups’ tab will allow you to see the specifics for and manage each CBS you have established.
RECAP OF ONE-TIME INDIVIDUAL BOOKING REQUEST FORM

One-Time Individual Booking Request Form is the replacement for the current Administrative Group process for one-off bookings, or a low volume of bookings over time. Below is an outline of some of the similarities and differences between the OTIBRF, 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 is required 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
Custom Booking Solution is the replacement for the current Administrative Groups that have complex or high volume of travel. Below is an outline of some of the similarities and differences between the new CBS process, and the current Administrative Group process.

### Similarities
- Can accommodate non-employee/guest, students, or employees
- Option for a p-card on file or traveler to pay
- Allows Admin/requester to set booking parameters
- Provides a single booking code to provide to all travelers in that group

### Differences
- Intended for specific events or use cases with defined start and end dates
- Set up for a maximum duration of 12 months
- $120+ to establish each group
- Approval required if not providing a name list
- Approval optional if providing a name list
- Up to two-week turnaround to establish
UW policy defines “...lowest, logical..” airline price. Fox agents will provide the lowest price, but the traveler might choose something different that they consider more “logical”.

Logical is subjective and if price is a critical factor, we recommend the approver option is added, or that the booking is completed in Concur by the coordinator.

It is the responsibility of the coordinator or approver to determine if the traveler selected option is the most logical option for the business requirements.

You may set-up booking parameters, policies, approvals, etc. all of which Fox World Travel will work within.

All tickets/approvals/costs are ultimately the responsibility of the University. If coordinators, travelers, approvers aren’t trusted in the process, a trusted UW employee should be booking on their behalf.

Regardless of approval set-up, Fox will always try to assist travelers delayed or stranded while in Travel Status. By using these processes, additional costs may be incurred by each department/division.
APPENDIX:
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>

$120.00 minimum, additional fees may apply.

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

<table>
<thead>
<tr>
<th>Group Block Air Ticket Transaction</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Air sourcing and pre-tickets*</td>
<td>$205.00</td>
</tr>
<tr>
<td>Each domestic airline ticket issued or exchanged.</td>
<td>$42.25</td>
</tr>
<tr>
<td>Each International airline ticket issued or exchanged.</td>
<td>$45.25</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-Air Sourcing Fee</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nonrefundable sourcing fee paid when sourcing is requested.</td>
<td>$100.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee Travel Services Unused Ticket Exchanges</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Each domestic airline ticket issued or exchanged directly with an agent.</td>
<td>$51.00</td>
</tr>
<tr>
<td>Each international airline ticket issued or exchanged directly with an agent.</td>
<td>$65.00</td>
</tr>
<tr>
<td>Fox Emergency Service per call surcharge.</td>
<td>$10.00</td>
</tr>
<tr>
<td>Hours: 7:30pm - 7:00am CST, holidays and weekends.</td>
<td>$30.00</td>
</tr>
<tr>
<td>Per void, refund or cancellation.</td>
<td>$10.00</td>
</tr>
</tbody>
</table>

*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.

UW Overall (Systemwide) Transaction Type

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>% of 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>
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
OPTIONS FOR BOOKING GUEST/NON-PROFILED TRAVELERS

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
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
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
FOX TRANSITION – WEBINARS/TRAININGS

• 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

• October 2024 (estimated): Canvas Training for non-employee travel processes

*To register for transition sessions, visit UW TravelWIse Agency Transition webpage
REMINDERS: TRANSITION SPECIFICS

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