

# Travel & Concur

October, 2023

On Campus

# UWSA Travel Contacts

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# Agenda

- Basics of UW Travel program
- What's the latest in travel?
- Travel & Expense policy
- How to's:
  - Book – Concur or with agents
  - Administrative Groups
  - Combine Business & Personal Travel
- Concur demo
- What's coming up?
- Resources and Q&A



# 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





**Employee Services**

Will be used for majority of travel not NCAA related and not part of a group block of 10 or more from the UW

- Individual travel (employees, guests, students)
- Administrative Groups

**University Group Block Services**

Must be used for all groups of 10 or more where:

- Attendees are flying together on the same flight which requires direct agreements with the airlines to set up

**NCAA Athletics Services**

Must be used for all NCAA related travel (individuals and groups)

**Dedicated Team Business Hours:**  
7 am CST-8 pm CST Monday-Friday, excluding Holiday

**Dedicated Team Business Hours:**  
8 am CST-5 pm CST Monday-Friday, excluding Holiday

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Links to information for:

[Travel Incorporated](#)

[Fox World Travel](#)

[Shorts Travel Management](#)



# State of Travel Industry – What to expect

*There is good news and bad news...*

- Summer craziness easing
  - Weather calming nationwide
  - Airport lines easing
  - Fares are moderating
- Phone issues with Travel Incorporated
- Smaller airports losing service



# UW-Platteville Travel Updates

- Domestic Travel is allowed and may be booked in our booking channels
- International travel requires approval from the **International Programs Office**
- "Ghost card" or central airfare billing removed 9-1-23





# Ghost Card (Central Air Billing) Deactivated 9-1-23

## How is Airfare Now Paid?

- P-card
  - ✓ May be used for individual bookings if traveler is a p-card holder
  - ✓ Arrangers may use their p-cards to book on behalf of employees, students or guests
    - P-card holder must be added as Arranger in Concur to use card for other employees
  - ✓ [Administrative Group](#)
  - ✓ For large transactions, request temporary limit increase (purchasing@uwplatt.edu)
- Personal credit card
  - ✓ May be used for individual bookings
  - ✓ Airfare expense reports can be submitted for reimbursement prior to travel
  - ✓ Should not be used when booking for guests or non-employees

*Direct Charge of Airfare form no longer needed*



# 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
- Utilize Campus Travel Manager for assistance with policy, planning and booking questions
- Reconfirm flight
- Arrive at airport early



# Let's talk about policy

**UW UNIVERSITY OF WISCONSIN SYSTEM**

**Travel**  
UW TRAVELWISE

**TRAVEL POLICY** PROCEDURES BOOK TRAVEL E-REIMBURSEMENT RESOURCES TESTING123

University of Wisconsin  
Air Travel  
General Travel And Expense  
Ground Transportation  
Headquarter City And Sponsored Events (Hosted Meals)  
Lodging  
Meal And Incidental/Per Diem Allowances  
Purchase & Payment Miscellaneous Travel Expenses  
Relocation  
Wisconsin Sales Tax Exemption  
Sales Tax Exemption From Other States

**elwise**

**Contact**  
**Travel Incorporated**  
**Dedicated Agent**  
**Hours:** M-F 7 AM to 8 PM CST  
**Phone:** (877) 811-9898 or 470-589-2205  
*Afterhours*  
*Emergency Support Available 24/7/365*

**All UW Agencies**

**Campus Travel Manager**  
-Policy Assistance  
-Booking Questions  
-Reimbursement Assistance  
-Training Opportunities

**Logins**  
**Concur – Online Booking**  
**E-Reimbursement**  
**Lodging, Meals and Incidentals Per Diem Calculator**  
**Travel Incorporated Portal**  
**Shorts Travel Hub**

**Travel News**  
**Rental Car Contract Changes**  
*October 17, 2023*  
**Concur two-factor authentication – Effective October 18th**  
*October 11, 2023*  
**UW/Southwest Sustainability Sweepstakes – Win Airfare**

**View by Institution**



# 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
- 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:
  - ✓ Primary - Enterprise/National - Big10 contract
  - ✓ Now also primary - Hertz
  - ✓ Book with a Travel Inc. Consultant or in Concur
  - ✓ Never accept extras such as fuel service, GPS, Roadside Assistance, etc. These are not reimbursable
  - ✓ Traveler is expected to refuel car prior to return –receipts required
  - ✓ Preferred is to book standard, able to book up to full size SUV if needed



# 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 use a department p-card on file with Travel Inc for agent reservations or;
  - ✓ To set up the group for individual bill, where each traveler provides a personal credit card at the time of booking.





# Administrative Groups

- 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:** *Set-up can take up to 48 business hours. Not advised if travel needs to take place within 20 days*



# 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 1/1/23: \$0.655 per mile
- More than 100 miles, a fleet vehicle should be used
  - ✓ <https://uwplatt.sharepoint.com/sites/AdministrativeServices/FacilitiesManagement/SitePages/Car-Fleet.aspx>
  - ✓ Provide fleet non-availability slip if no fleet vehicle is available
  - ✓ Exception – Trips to an airport (can't park fleet vehicles at the airport)
- More than 100 miles roundtrip without using fleet - Turndown Rate (Employees and Students)
  - ✓ After 7/1/22: \$0.42 per mile



# Individual Meal Per Diems

- Per Diem is an allowance provided for individual meals and incidentals. No receipts required
  - ✓ Amount varies by location
  - ✓ Provided for any overnight travel
  - ✓ Include conference documentation in expense reporting to indicate provided meals
- Day Trip Allowance is \$15 (taxable) and provided for day trips
  - ✓ No receipts required



# Hosted Meals

- Conferences
  - Seminars
  - Retreats/Workshops
  - Training Sessions
  - Academic Colloquiums
  - Receptions
  - Orientations
- Hospitality or hosted meals between University hosts and job interview candidates or recruits

Expense	Within Wisconsin	All Other Continental US	All Other Locations - Including International
Breakfast	\$20	\$23	\$35
Lunch	\$21	\$24	\$40
Dinner	\$35	\$43	\$60
Refreshments/Break	\$12	\$15	\$20

A [Candidate Hosted Meal Payment Form](#) must be completed and attached to the TER if hosting a candidate

\*Maximum of three employees per hosted candidate meal.



# 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 the TravelWise site for more details.

**\*If you are unable to receive exemption, make note of reason why on expense report**



# Real ID



- Wisconsin DMV issues REAL ID compliant products (marked with a star) in accordance with the federal [Real ID Act](#)
- If you plan to fly within the U.S., visit a military base or other federal buildings, the Department of Homeland Security will require identification that is REAL ID compliant (or show another acceptable form of identification, such as a passport) beginning **May 7, 2025**.

# Real ID



Compliant



Not Compliant

# Concur

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[University of Wisconsin System](#) / [Travel](#)

# UW TravelWise

## Logins

[Concur - Online Booking](#)

[E-Reimbursement](#)

[Lodging, Meals and Incidentals Per Diem Calculator](#)

[Travel Incorporated Portal](#)

[Shorts Travel Hub](#)

## Incoming Events

## Travel News

**Rental Car Contract Changes**

*October 17, 2023*

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[All UW Agencies](#)

### Campus Travel Manager

-Policy Assistance

-Booking

Questions

-Reimbursement

Assistance

-Training

Opportunities



[View by Institution](#)



# What's coming up?

- New Enterprise/National Big 10 contract
  - Rates have increased, plus \$5 surcharge for WI airports
  - Leisure use contract removed
  - More fees for student renters
  - Hertz also primary
- Concur two-factor authentication – use [TravelWise](#) SSO
- Southwest promotions
- UW System becoming Universities of Wisconsin
- Workday changes – summer 2025
  - First/last day per diem adjustments
  - Raising required receipt amount
  - Missing cost comparison – 80% reimbursement

# Links

- [UW TravelWise Website](#)
- [E-Reimbursement Login](#)
- [Policies](#) (where to find)
- [UW Platt travel website](#)
- Travel News – [Newsletter Sign Up](#)
- [Concur Login](#) & Demo
- [Per Diem Calculator](#)



**Thank you!**

