

# **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 <u>designated Agencies</u>
- 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









#### Links to information for:

**Travel Incorporated** 

**Fox World Travel** 

**Shorts Travel Management** 

#### **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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### 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
  - √ <u>Administrative Group</u>
  - √ 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

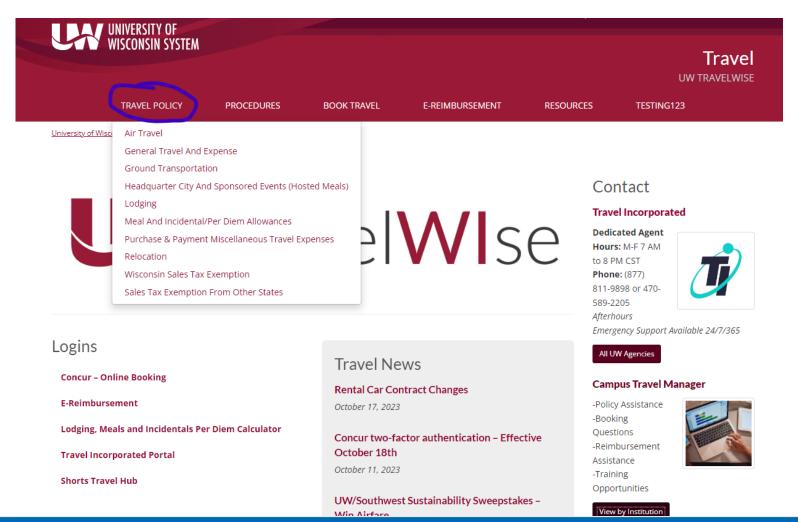


# Ways to make travel smoother

- Self-service options encouraged
  - ✓ Use Concur for booking
  - ✓ Use <u>Travel Inc Hub</u> 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





# **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 <u>Lodging and Per Diem</u> <u>Calculator</u>

Preferred hotels should be used whenever available



# **Policy Highlights - Ground**

- Must be an <u>authorized driver through Risk Management</u> 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 <u>Administrative Group process</u> 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 <u>Admin Group</u> Department arrangers must provide the following information and use the Travel Incorporated <u>UW Group Reservation Request</u> <u>Form</u> 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
  - ✓ <a href="https://uwplatt.sharepoint.com/sites/AdministrativeServices/FacilitiesManagement/SitePages/Car-Fleet.aspx">https://uwplatt.sharepoint.com/sites/AdministrativeServices/FacilitiesManagement/SitePages/Car-Fleet.aspx</a>
  - ✓ 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**

- <u>Per Diem</u> 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 <u>Candidate Hosted Meal Payment Form</u> 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



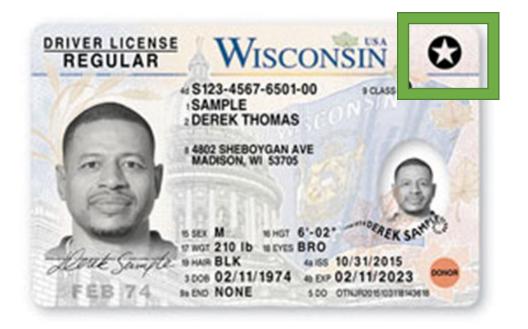
### Real ID

 Wisconsin DMV issues REAL ID compliant products (marked with a star) in accordance with the federal <u>Real ID Act</u>

• 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



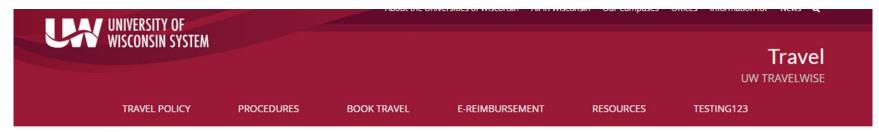


Compliant

**Not Compliant** 



### Concur



University of Wisconsin System / Travel



#### Logins

Concur - Online Booking

E-Reimbursement

Lodging, Meals and Incidentals Per Diem Calculator

**Travel Incorporated Portal** 

**Shorts Travel Hub** 

Uncoming Events

#### **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

#### 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

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 <u>TravelWlse</u> 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

- <u>UW TravelWIse Website</u>
- E-Reimbursement Login
- Policies (where to find)
- UW Platt travel website
- Travel News <u>Newsletter Sign Up</u>
- Concur Login & Demo
- Per Diem Calculator



# Thank you!

