

Candidate Travel

Planning, Booking, and Reimbursing Interview
Candidates

Agenda

- Payment Method
- Funding
- New Forms
- Airfare
- Lodging
- Car Rental
- Meals & Incidental Per Diem
- Hosted Meals
- Reimbursement

Presenters

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Paying for Travel

- P-cards are allowed and encouraged for:
 - Flights - require payment at ticketing
 - Hotels require card at booking but usually is not charged
 - Contact the hotel for credit card authorization and tax exemption
 - Hosted Meals
- Travelers may use personal funds & be reimbursed for the following:
 - Car Rental
 - Shuttle/Uber/Lyft/Taxi
 - Meals (not including hosted meals)
 - Baggage fees
 - Parking at airport
 - Mileage to airport



Funding

- Human Resources will pay for all eligible, policy-compliant travel expenses
 - Candidate must be traveling 125+ mile radius to campus
 - First round interview has been completed (phone, Zoom, etc.)
- Departments are responsible for expenses if candidate is within 125 miles of campus and/or the first round of interviews was not completed
- Reallocate Pcard charges to appropriate funding string
- Select appropriate funding string in TER for reimbursement



New Forms

- One-Time Individual Booking Request Form (OTIBRF)
 - Perfect for candidate travel
 - Requires coordinator to have active Concur profile
 - Completed and managed in Fox Portal
 - One form per traveler
 - Coordinator completes form in Fox Portal, email is sent to traveler with code, traveler contacts Fox World with code and books, itinerary and invoice sent to traveler and coordinator
 - Can require approvals if wanted
- Custom Booking Solution (CBS)
 - Replaced Admin Group codes
 - Requires 20+ travelers and has \$120+ set up fee
 - Likely won't be utilized, but discuss with travel manager if interested



Fox World Travel Portal Demo



Airfare

How to Book: In Concur (book for guest), with agent (coordinator calls and books for guest), OTIBRF (traveler calls and books with agent)

How to Pay: Coordinator's p-card or traveler pays and is reimbursed

What HR funds: domestic airfare; international candidate's flights to US will not be funded by HR (dept funding requires approval from International Programs office)

Agency Fees: \$6 Concur fee/ticket; \$31.50 agent fee domestic/ticket; \$41.50 agent fee int'l/ticket

Required Receipts: Itinerary with invoice from Fox World Travel, baggage receipts if over \$30, parking receipts if over \$25



Lodging

How to Book: In Concur (book for guest), with agent (coordinator calls and books for guest), OTIBRF (traveler calls and books with agent), direct with hotel

How to Pay: Coordinator's p-card (must call hotel and complete credit card authorization; traveler will still need to present a card for incidentals) or traveler pays and is reimbursed

What HR funds: one night stay; additional nights require approval from HR Talent Management Team

Policy: Must be within nightly max rate found via per diem calculator

Required Receipts: Hotel invoice - ensure tax exemption; incidentals such as room service are not reimbursable



Car Rental

How to Book: In Concur (book for guest), with agent (coordinator calls and books for guest), OTIBRF (traveler calls and books with agent)

How to Pay: Traveler pays and is reimbursed; Coordinator can use p-card to reserve, but traveler credit card is required at check in

What HR funds: Vehicle rental and gas

Policy: Must be booked with Enterprise/National or Hertz and utilize BIG10 or NASPO contracts; Concur auto uses these contracts

Required Receipts: Vehicle rental receipt (cannot be reservation confirmation) and all gas receipts



Meal & Incidental Per Diem

How to Pay: Traveler pays and is reimbursed via the meal and incidental per diem; Hosted meals are considered a provided meal

What HR funds: Meal and Incidental Per Diem

Policy: Rates can be found using the Per Diem Calculator

Required Receipts: No receipts are required



Hosted Meals

How to Pay: PCard (preferred)

What HR funds: Allowable hosted meal costs

Policy:

- Must stay within allowed amount per person as outlined in the UW System Hosted Meals Policy
- Two hosted meals (recommended) but no more than three will be reimbursed per invite
- Reimbursement for candidate and up to three University representatives
- Alcohol is non-reimbursable
- Full policy [here](#)

Required Receipts: Itemized receipts required showing each food/drink item and gratuity; tax exempt in WI



Reimbursement

- Non-employees are paid for out-of-pocket expenses using the e-reimbursement system
 - Request a Non-Employee ID
 - Create and submit the expense report under the non-employee ID
 - Payment is made via check to address from non-employee request form
- Employees are paid for out-of-pocket expenses using the e-reimbursement system
 - When paying employees from other institutions, use Custom Funding in the Expense Report to change business units



Non-Employee Profile Demo



Helpful Tips

- Always provide traveling candidates an after hours emergency contact
- Ensure candidates know what they will be paying for out of pocket and that only in-policy expenses are eligible for reimbursement
- Provide candidates a list of required receipts and who to send them to
- Provide candidate a tax exempt certificate prior to travel
- Determine what is funded by HR and what is funded by dept.
- For travel emergencies like cancelled or delayed flights, have the traveler contact Fox World Travel. The agents will make sure the travelers are taken care of

Fox World Travel Contact Info

Higher Education Team Hours: 7am-7:30pm

After Hours Emergency Support Available 24/7

Agent Phone: 608-710-4172

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Questions?

