

# Travel Services Open House

## Updates and Review of Changes to the UW Travel Program

# Agenda



Review of New Travel Agency Vendors



Focus on Travel Incorporated



UATP Card Overview



Review of TravelWise Website and Rate Calculator



Travel Policy Changes & Updates



Q & A

# Travel Program Updates - What Changed

## As of July 2020


- New UW TravelWise website, administered by UW System
- New travel rate calculator (lodging maximums and meal per diems)
- Rollout of Concur app and Travel Incorporated app for booking and viewing reservations on mobile devices
- Most employees will be working with a new travel agency and new travel consultant team
- 'Lite' policy updates
- Full pre-payment for lodging is now allowed (Airbnb allowed)
- All Travel Inc Fees are paid at point-of-sale (except UWEC) – previously only UW Madison and UW Oshkosh paid fees at the point-of-sale

# Travel Program Updates – What Stayed the Same

## As of July 2020

- Concur will still be used for online travel reservations (but will be fulfilled and invoiced by Travel Incorporated)
- University card policy and vendor (US Bank)
- Ability to use a travel agent/consultant for service
- 24/7 agency coverage is available, with a dedicated UW team during core business hours
- Requirement to book air with contracted agencies
- UW Madison Athletics will still book with Anthony Travel
- Transaction/ticketing fees still apply for agency bookings

# Travel Agency Vendor Guide

		
<p><b>Employee Services</b></p> <p>Will be used for majority of travel not NCAA related and not part of a group block of 10 or more from the UW</p> <ul style="list-style-type: none"><li>• Individual travel (employees, guests, students)</li><li>• Administrative Groups</li><li>• Group Air Groups</li></ul>	<p><b>University Group Block Services</b></p> <p>Must be used for all groups of 10 or more where:</p> <ul style="list-style-type: none"><li>• Attendees are flying together on the same flight which requires direct agreements with the airlines to set up</li></ul>	<p><b>NCAA Athletics Services</b></p> <p>Must be used for all NCAA related travel (individuals and groups)</p>
<p><b>Dedicated Team Business Hours:</b> 7 am CST-8 pm CST Monday-Friday, excluding Holiday</p>	<p><b>Dedicated Team Business Hours:</b> 8 am CST-5 pm CST Monday-Friday, excluding Holiday</p>	<p><b>Dedicated Team Business Hours:</b> 8 am CST-5 pm CST Monday-Friday, excluding Holiday</p>

# Focus on Travel Incorporated

- Enhanced Duty of Care (ex. Covid-19 situation)
- Concur & Concur App for self booking
  - ✓ Concur profiles transitioned to Travel Inc at the end of June 2020
  - ✓ Travelers are encouraged to review Concur profile for accuracy
  - ✓ All travelers should have a credit card in their profile, designated to airfare
  - ✓ All travelers will have guest booking access in Concur
  - ✓ Guest booking should only be used for guests, not employees
- Travel Consultants and Emergency Services available
- Enhanced Technology
  - ✓ TI Mobile App to access itinerary, add meeting notes, check-in to your flight and more
  - ✓ TI Travel Hub to update profile, access lost invoices

# Focus on Travel Incorporated

- Travel Inc. Fees
  - ✓ All campuses other than UW Eau Claire moved to 'point of sale' service fees
  - ✓ Expense travel agency fee (separate expense line on TER)
  - ✓ Emphasis on booking in Concur – service fee only \$3.75 per ticket/transaction
    - \*NOTE: ALL UATP transactions will incur an \$18.00 service fee (Concur or Consultant booking)
  - ✓ No fee for car/hotel only booking
- To learn more about Travel Incorporated, you can access past Travel Incorporated Overview webinars on the UW TravelWise website.

# Travel Inc itinerary

**Date:** 04/10/2020  
**Record Locator:** 3MHBFC  
**Travelers:**  
Dressel, Elizabeth  
**Agent:** karen.young@travelinc.com

**Agency Information**  
4355 River Green Parkway  
Duluth GA, 30096  
7702914200



Thu, Oct 01 2020

4:39 PM depart **Madison (MSN) to Los Angeles (LAX)** — Confirmation No. **C4LF9G**



**United Airlines**

Flight 5962  
OPERATED BY SKYWEST DBA UNITED  
EXPRESS  
PLEASE CHECK-IN WITH THE  
OPERATING CARRIER

**Takeoff:** 4:39 PM

Madison, WI  
Economy [ Q ] Class | Food and  
Beverage for Purchase | 4h 15m

**Landing:** 6:54 PM (Terminal: 7)  
Los Angeles, CA

**Travelers:**

Name: Dressel, Elizabeth Ticket #: 016-7418806374 Seat: 24B

6:54 PM pick-up

**National** Confirmation No. **12345—**

Phone: 800 328-4300  
Pickup Location: Los Angeles International Airport  
Car Description: 2/4 Door Intermediate Automatic AC

Daily Rate: \$31.00 200MI .21MI MI  
Corp Discount No.: xxxxZ076  
Customer ID: xxxx  
Driver:

3:00 PM check-in

**Crowne Plaza Lax** Confirmation No. **12345—**  
Address: 5985 W Century Blvd LOS Angeles Ca 90045  
Nights: 1  
Guarantee Info: Visa \*\*\*\*\*1111  
Other Info:  
Nightly Rate: \$119.20

Phone: 1-310-642-7500 Fax: 1-310-649-4035  
Rooms: 1 room  
Room Desc:  
Cancel Policy: Cancel By 48hrs Prior To Arrival Local Hotel Time  
To Avoid Billing. You Must Contact Hotel Or Agency For Change  
Or Cancellation.

Fri, Oct 02 2020

check-out **Crowne Plaza Lax** Confirmation No. **12345—**

drop-off **National** Confirmation No. **12345—**

**Additional Information:**

- If Your Trip Includes Air Travel Plan To Arrive At The Airport A Minimum Of 2 Hrs Prior To Departure.
- Approved Government Issued Photo Id And Boarding Pass Required For Airport Security And Check-In.
- Refer To [www.Dhs.gov/Real-Id](http://www.Dhs.gov/Real-Id) To Verify List Of Approved Government Ids.
- For Us Airport Travel Tips Refer To [www.Tsa.gov](http://www.Tsa.gov).

**\*If trip is booked in Concur, a reservation email from Concur may also be sent**

## Travel Inc itinerary

- ✓ Sent to email address designated in the traveler's Concur profile
- ✓ Can be sent to arranger if designated in Concur profile
- ✓ Confirms that Travel Inc has issued your ticket
- ✓ Cannot be used for E-reimbursement



# Travel Inc Invoice



Ticket Number 016-7418806374  
 Account # U02320  
 Issue Date Fri, Apr 10, 2020  
 Booking ID 3MHBFC  
 Issuing Location 92I  
 Booking Agent ID UE  
 Transaction Type Electronic Ticket  
 Booking Currency USD

Name: Dressel/Elizabeth

Type	Carrier Equip	Flight # / Class Fare Basis	Travel Dates	City - Airport	Time
	UNITED AIRLINES E7W	5962 / Q QAAZAFEN Confirmation: C4LF9G	Thu, 10/01/2020 Thu, 10/01/2020	Leave :: MADISON (MSN) Arrive :: LOS ANGELES (LAX)	439P 654P
	Vendor: Pickup City: Dropoff City: Confirmation Number: GalaxyNet Status:	NATIONAL LOS ANGELES (LAX) LOS ANGELES (LAX) 12345		Pickup: Return: Your Daily Rate: Number of Cars: Number of People: Car Type:	Thu, 10/01/2020 Fri, 10/02/2020 \$31.00 1 1 ICAR
	Hotel: Address:	Crowne Plaza Lax 5985 W Century Blvd Los Angeles, CA 90045		Check In: Check Out: Your Nightly Rate: Number of Rooms: Number of People: Room Type:	Thu, 10/01/2020 Fri, 10/02/2020 \$119.20 1 1 A1K
	Fare				\$371.00
	Tax				\$10.10
	Total Amount				\$381.10
	Amount Charged				\$381.10

## Travel Inc Invoice

- ✓ Emailed to traveler only
- ✓ Can be accessed by travel arrangers via link on itinerary
- ✓ Used as receipt to support p-card statements and expense reports

# Unused Tickets – Overview

- Changed vendors on July 1, 2020, and airline industry restrictions would not allow UW System to transfer all unused tickets from one vendor to another
- UW System was able to convert the value of the unused tickets to UATP (Universal Air Travel Plan) prepaid airline cards. This applied only to unused tickets from Delta, United, American, and Southwest, that are non-athletic related
  - This process allowed UW System to utilize the \$3M of unused tickets, without expending new funds to purchase tickets

## What do you need to do?

- Pay attention to the invoice to ensure you are not asking for reimbursement for a service fee or an airline ticket that was not charged on the UATP card (cover on next slide)
- The [Unused Ticket Guide](#) (for carrier tickets not converted to UATP) on TravelWise is the best place to get detailed information about this process and find the list of any personal/family/companion tickets that remain open for use (directly with airline)
- Visit the [FAQs for Unused Tickets](#) for more information

# Travel Incorporated - UATP Invoice Example

## Travel Incorporated Sample Invoice



Ticket Number 006-7614052183  
 Account # U02380  
 Issue Date Mon, Oct 12, 2020  
 Booking ID 79RBPR  
 Issuing Location U6W  
 Booking Agent ID 110  
 Form of Payment TPxxxxxxxx00012  
 Transaction Type Electronic Ticket  
 Booking Currency USD

Name: [REDACTED]

Type	Carrier Equip	Flight # / Class Fare Basis	Travel Dates	City - Airport	Time
✈	DELTA AIR LINES CR9	4702 / Q QA0QA0MQ/XX42U Confirmation: G37LXF	Wed, 10/14/2020 Wed, 10/14/2020 Economy	Leave :: DETROIT (DTW) Arrive :: MADISON (MSN)	356P 413P
✈	DELTA AIR LINES CR9	4702 / Q QA0QA0MQ/XX42U Confirmation: G37LXF	Thu, 10/15/2020 Thu, 10/15/2020 Economy	Leave :: MADISON (MSN) Arrive :: DETROIT (DTW)	505P 721P

Description	Payment Date	Amount	Form of Payment	Reference #
Call In Air Equity Card	10/13/2020	\$18.00	Vlxxxx75693	039279

Fare	\$615.16
Tax	\$20.20
Total Amount	\$635.36
Amount Charged	\$635.36
<i>Air only indicated here.</i>	
Fee : Call In Air Equity Card	\$18.00
Air + Fee	\$653.36

Remark(s)  
U11/CHANCELLORS OFFICE

Description	Payment Date	Amount	Form of Payment	Reference #
Online Air Equity Card	08/12/2021	\$18.00	Vlxxxx65396	079411

Example #2

- Only Airfare (not agency service fees) is charged to the UATP card.
  - In this example, \$635.36
  - If “Form of Payment” starts with “TP” then UATP card was used.

### Service Fees (All campuses except UWEC)

- If a card **was not** previously saved in travelers profile before day of reservation – fee may be charged to a central UW card.
- To see what card was used for the fees, see “Air Equity Card”
  - for **UW Madison**, If the card ending in **65396** was used - do not submit a TER for the service fees.
- Other Campuses (except UWEC):
  - If the card ending in **75693**, was used, select ‘Prepaid Purchasing Card’ as the reimbursement method on the TER.
  - All UATP Transactions are charged an \$18 service fee, even if booked in Concur

# Double Check Travel Inc Invoices: UATP Cards and Process

- Employees will need to pay attention to invoice receipts when booking with Travel Incorporated to confirm if the UATP card paid for the airfare or if it was charged to the card on file for the individual, or the campus card.
- When creating an expense report, where the UATP Card was used for payment, be sure to select the UATP card

Airfare - 06/08/2020

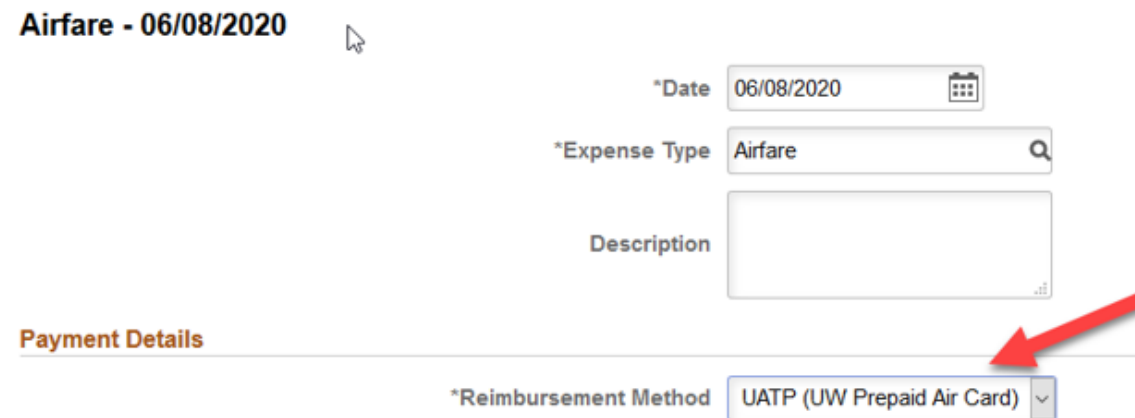
\*Date 06/08/2020

\*Expense Type Airfare

Description

Payment Details

\*Reimbursement Method UATP (UW Prepaid Air Card)



- Each UATP transaction will have a \$18 service fee – as an agent is handling behind the scenes
- Check invoices to see which card was charged to pay for the service fee
  - Note UW Eau Claire pays service fees centrally

# Concur Messaging

- Campus Specific COVID travel information
  - ✓ Some campuses have not yet opened Concur due to COVID restrictions
- Guest traveler bookings
  - ✓ All employee have guest booking access
  - ✓ Employees should never be booked as guests

**Welcome to Concur!**

We need a little more information to start booking your trip. Please take a moment to fill out the following fields and click **Next**.

Thank you.

Traveler Type [Required]

Employee  
Guest  
Student

Login Warning

⚠ Until further notice, all travel outside of Wisconsin requires pre-approval.

Employees should obtain both their VP & President's office approval and submit the completed [UWSA Covid 19 Travel Request Form](#) to a Travel Incorporated consultant to book travel. Bookings of In-State Travel are allowed.

If you have any questions please contact your Travel Manager Alma Ramirez [aramirez@uwsa.edu](mailto:aramirez@uwsa.edu).

Concur requires a credit card to complete the booking process. University funded UATP cards will be used for qualifying airline bookings. [Please review your Travel Inc invoice to determine the form of payment used.](#) Visit UW TravelWise for more information regarding the [University's unused COVID-19 tickets and UATP process.](#)

OK

? **New Travel Management Company/New Process!**


When searching for lodging please ignore the Concur calculated per diem rates.

The University's per diem rates are available at: [University Per Diem Rates](#) and will be automatically applied to your Concur search results.

Cancel Continue

# Process Change for Hotel Booking in Concur


### Trip Summary

 **Select a Hotel**

Nights: 1  
Madison, WI, USA

Check-in: Wed, 08/25/2021  
Check-out: Thu, 08/26/2021

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 **Finalize Trip**

### Hotel Per Diem Locations

in line with our UW Rates  
in line with our UW Rates  
in line with our UW Rates

Search for Locations near:

Country/Region (Select a Country/Region to get a list of locations or States)  
 ▾

State/Province ?  
 ▾

Location  
 ▾

Lodging Rate	Meals Rate	Incidentals Rate
\$ 131	\$ 56	\$ 5

**New Page in Hotel Booking Process**

- Required page per Concur Programming
- Disregard this page
  - ✓ No information is to be entered, it may not be in line with UW Rates
  - ✓ Simply hit "Next"

Please choose the per diem location for your hotel

Start Over

<< Previous

Next >>



# UW TravelWise Website Change





# Watch TravelWise Walkthrough



# Per Diem Calculator Change

## Per Diem Calculator

- Accessible through UW TravelWise (link on home page)
- Everything done with same system (SFS created and will host new rate calculator)
- Similar look and feel to E-reimbursement

Cancel Lookup

Search for: Location Code [Show Operators](#)

▼ Search Criteria

Location Description (begins with)

Country Code (begins with)

State Code (begins with)

▼ Search Results

Expense Location	Location Description	Country	State
MEMPH	MEMPHIS, TN	USA	TN

1 row

**Per Diem Calculation**

One Day Trip?  No

[How do I use this page?](#)

**Multi Day**

Location Code	Location Description	Country	*From	*To
1 <input type="text" value="DENV1"/>	DENVER COUNTY, CO	USA	10/12/2020	10/15/2020

Please click on the 'Fill Grid' button below once all data has been inputted above

Location Description	Date	First/Last Day?	Breakfast Provided?	Lunch Provided?	Dinner Provided?	Meals	Lodging
1 DENVER COUNTY, CO	10/12/2020	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No	\$ 57.00	\$ 244.00
2 DENVER COUNTY, CO	10/13/2020	<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No	<input checked="" type="radio"/> Yes	\$ 40.50	\$ 244.00
3 DENVER COUNTY, CO	10/14/2020	<input type="radio"/> No	<input type="radio"/> No	<input checked="" type="radio"/> Yes	<input type="radio"/> No	\$ 54.70	\$ 244.00
4 DENVER COUNTY, CO	10/15/2020	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> No	<input type="radio"/> No	\$ 57.00	\$ 0.00
5						\$ 209.20	\$ 732.00

5 rows

# 'Lite' Policy Changes – Effective July 1, 2020

- Changes to Lodging: allow for Airbnb, and full prepayment, continue to restrict Third Party Bookings (as is now)
  - ✓ Add clarity that hotels can be booked directly.
- Real IDs have been added to the list of non-reimbursable expenses
- Vehicle size – Allow up to mid size SUV
- Employees must resubmit 90 days after TER returned
  - ✓ Employees would be taxed if they don't resubmit after 90 days (same if they don't submit within 90 days originally)
- Day trip meal allowance, not requiring deduction if meal provided

**Still working on full Travel Policy Refresh for 2022**

# Return to Travel – Post Covid

- Check [Campus specific travel restriction](#)
  - ✓ Do you need approval to travel?
- Book in advance (especially rental cars)
- Hotel service are limited (housekeeping)
- Airline requirements
  - Check [Travel Inc COVID-19 Hub](#)
  - Visit individual airline websites/apps
- International travel (vaccine requirements & Covid testing requirements)
  - ✓ Visit [UW TravelWise COVID-19](#) page

# Helpful Tips and Reminders

- Bookmark the [UW TravelWise website](#). It's your one-stop shop for all things travel related.
- Sign up for the [UW TravelWise monthly newsletter](#) to stay informed on UW System travel news.
- [View past training webinars](#) on demand.
- The [FAQ document](#) is posted on the UW TravelWise website that addressed many questions asked during prior Open Houses
- Email [uwstraveloffice@uwsa.edu](mailto:uwstraveloffice@uwsa.edu) with any questions.

Q&A

A photograph showing four hands holding up large, red, three-dimensional letters that spell out "Q&A". The hands are positioned at the bottom of each letter, and the letters are arranged in a slightly staggered, horizontal line. The background is plain white.