

# YOUR *Business* CONNECTION

APRIL 2017

[www.uwlax.edu/business-services](http://www.uwlax.edu/business-services)

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## Welcome!

Business Services hopes you enjoy our April issue of *Your Business Connection*! We are pleased to be bringing you monthly updates, reminders, and highlights of the resources on our webpages. Each article links you to additional information. We know *Your Business Connection* will become a valuable tool for you!

## Fiscal Year End 2017

The end of the fiscal year (FY) is right around the corner. To help you prepare for it, please review the fiscal year end deadlines grid found [here](#). The grid provides the fiscal year end item, the submission date, and who to contact for assistance. Other fiscal year end items to note follow:

- Airfare can be booked in FY17 for travel occurring prior to October 1.
- Conference registration fees can be paid in FY17 for conferences occurring in FY18 provided the registration is identified as an Early Bird offering expiring before the end of the fiscal year.
- Conference registration fees can be paid in FY17 if the conference occurs prior to October 1 and a discount is available if booking in FY17.
- Purchase Requisitions should be submitted as soon as possible to allow for processing. Although most of the deadlines are in June, Purchasing has deadlines in May.

Additional fiscal year end reminders will be coming in our May issue of *Your Business Connection*!

## Cash Handling Training Requirement

Do you or your staff handle cash for UWL? If so, you are required to complete cash handling training hosted by Business Services. Protect yourself and UWL assets by receiving training prior to handling cash. The Cashier's Office offers two types of training dependent on your needs:

- Are you new to cash handling? Please call the Cashier's Office at 785-8545 to schedule your in-depth, in-person, training session held in the Business Services office.
- Is it time for your annual refresher? Please complete the [online training](#). This condensed version will revisit the highlights of the initial training session and takes less than fifteen minutes to complete.

To review UWL Cash Handling Procedures, please click [here](#).

## TRAVEL INFORMATION



### Who is Fox World Travel?

Fox World Travel is the University of Wisconsin's system-wide contracted travel provider.

All airline reservations for University sponsored travel must be made with Fox World Travel, either with agents or within the Concur online self-booking tool, per [UWSA Policy 410 – Purchase & Payment of Business Air Travel](#).

### What is Concur?

Concur is an online self-booking tool for Fox World Travel which allows travelers to book their own flights, hotels, and rental vehicles. Travelers have the option of booking online through Concur or contacting a Fox World Travel agent directly.

- [Click here](#) for Concur Booking Tool Quick Tips.
- [Click here](#) to access additional guides and tutorials for Concur and e-Reimbursement.

### Where is UWTravelWise?

UWTravelWise is UW System's travel site through Fox World Travel. There is a UWTravelWise button on the Business Services home page that takes you to Concur, the Lodging/Meal & Incidental Calculator, and other resources.

To book travel for guests, students, or a group, complete a [Travel Request Form](#) available on UWTravelWise under Reservation Options. This form is sent to Debbie Talbott, our UW System Onsite Travel Agent, who works directly with travelers to book through Fox World Travel.

### Airline Flights and Overbooking

In the wake of United Airlines involuntarily bumping boarded passengers on April 9, 2017, traveler concerns have been raised about the UW's preferred supplier relationship with United Airlines.

For more information regarding voluntarily and involuntarily bumping, click [here](#) for more details.

### What is a Delta Basic Economy Fare (E Class Fare)?

A Basic Economy Fare (E Class Fare) is Delta's restricted, low-cost airline ticket. Please be advised of the following limitations if purchasing these tickets:

- E Class Fare tickets are *non-refundable, non-changeable, and credits will not be issued*.
- Advance seat selection *is not* available. Seats are automatically assigned when checking in.
- Upgrades *are not* available.
- Same-day confirmed or same-day standby travel changes *are not* available, regardless of Medallion or other elite status.

Fox will send an email to any traveler who has booked a Delta Basic Economy fare to remind them of the restrictions and prompt them to void their ticket within the 24-hour period should they wish to purchase a ticket for a less restrictive economy fare.

For more information, please [click here](#).

### Cell Phone Field in Concur!

To better assist travelers in the event of airline delays and cancellations, as well as for outreach in emergencies, users will be required to complete the cell phone number field in their Concur profile. If a traveler does not have a cell phone, an office or home number can be entered.

- **New users:** The cell phone number field must be completed to save a profile.
- **Existing users:** When users launch the Concur search, the user will be prompted to complete the cell phone number field.

For more information, please visit the [Travel News & Updates Tab](#).

### ALTITUDE Flight Monitoring & Alert Notification

If you haven't done so already, sign up for ALTITUDE with your next air reservation. ALTITUDE is the UW System's free flight monitoring and alert notification application offered by Fox World Travel. ALTITUDE keeps you updated on the status of your flight(s) via text or email. Alerts include:

- Cancellations or diversions
- Departure delays
- Gate changes
- Flight connections

Travelers are strongly encouraged to [opt-in!](#)

# TRAVEL INFORMATION



## POLICY UPDATE: UWSA Policy 415 Purchase & Payment of Lodging

Hotel reservations, including local, are to be made through [Concur](#), the online self-booking tool for Fox World Travel.

If you are attending a conference that has a block of rooms reserved at a hotel, you are able to reserve your room directly with the property. However, you are highly encouraged to also search [Concur](#) for your conference hotel(s), as often there are rates available that are less than the conference rate.

[Click here](#) to learn about the policy changes.

### Travel Information at Your Fingertips!

Please view the new Travel and Expense Reimbursement pages.

Click on the following links for updates.

- [Travel News & Updates](#)
- [Expense Reimbursement Updates](#)

Click on the following links prior to traveling.

- Getting Started > [Top 10 Things You Need to Know Before You Travel](#)
- Getting Started > [5 Requirements When Submitting a Travel Expense Report](#)

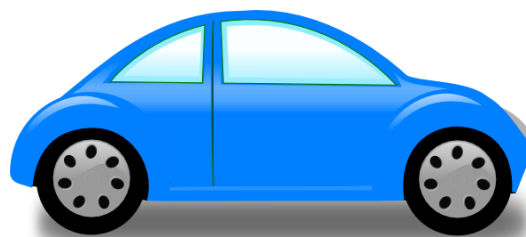
## POLICY UPDATE: UWSA Policy 425

### *Use of Personal Vehicles, Rental Cars, and Fleet for Business Transportation*

If a rental vehicle is determined to be the best mode of transportation, travelers are required to rent vehicles with Enterprise or National utilizing the UW System contract. Travelers are allowed to rent with Hertz under the State of Wisconsin (WSCA) contract when Enterprise and National do not have vehicles available or do not serve the travel location.

- Reserving a vehicle to pick up in La Crosse, use [Concur](#) or call Enterprise in La Crosse at 785-7400 #4 or National at the La Crosse airport at 781-5678. The contract ID number for both Enterprise and National is found [here](#) to provide when booking.
- Reserving a vehicle to pick up in locations other than La Crosse, use [Concur](#).

[Click here](#) to read more about UWSA Policy 425.



### New "Select Funding" Feature in e-Reimbursement

Have you seen the new feature called Select Funding in e-Reimbursement? You can now change the funding attached to your expense report or submit an expense report on behalf of another campus. [Click here](#) for more information.

## PURCHASING

### Print Purchasing

If you have a printing project of 500 units or more, contact John Elmer at 8503 or [jelmer@uwlax.edu](mailto:jelmer@uwlax.edu).

UW-La Crosse utilizes mandatory contracts for letterhead, envelopes, business cards, and brochures.



All print orders that exceed 500 units must be handled through Purchasing. Please allow a minimum of three weeks for processing.

Information regarding campus printing services can be found [here](#).

### THE GREEN SHEETS ARE GONE!

Please use our new and improved Purchase Requisition form now on the web!

As always, a Purchase Requisition form must be completed for purchases greater than \$5,000. The new form was updated just this month to include additional information and [definitions regarding items](#) that may cost less than \$5,000 but still require the submission of a [Purchase Requisition](#) to Business Services. Purchasing will review the requisition and create a Purchase Order to be provided to the vendor. For questions, please contact Paula Lund at 8724 or [plund@uwlax.edu](mailto:plund@uwlax.edu).

### How Many Ways Can You Say "Serial Purchase"?

Serial, split, fragmented, micro, and even stringing are all purchasing activities that can be viewed as an effort to circumvent purchasing policy. While there are many terms that loosely mean the same thing, designing the payment method to be the quickest and easiest for you at the moment may eventually result in a compliance issue.

Any purchase of \$5,000 or more to a single vendor, even if there are multiple items, shipping, or non-excludable tax, should be submitted on a [Purchase Requisition](#) to Business Services for the creation of a Purchase Order.

For example, if you would like to order several items from a vendor that individually are not over \$5,000, but when added together in that single order are over the \$5,000 limit, a Procurement Card (PCard) may not be used for the purchase. Even if the vendor could run the charge through in two separate transactions that are each under \$5,000, a Purchase Requisition must be submitted to Business Services and a Purchase Order will be created.

## BUSINESS SERVICES