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

<table>
<thead>
<tr>
<th>Employee Services</th>
<th>University Group Block Services</th>
<th>NCAA Athletics Services</th>
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| 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  
  - Group Air Groups | 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 | Must be used for all NCAA related travel (individuals and groups) |

**Dedicated Team Business Hours:**
- Travel Incorporated: 7 am CST-8 pm CST Monday-Friday, excluding Holiday
- Fox World Travel: 8 am CST-5 pm CST Monday-Friday, excluding Holiday
- Short’s Travel Management: 8 am CST-5 pm CST Monday-Friday, excluding Holiday
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 eltinerary

- 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

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

- Emailed to traveler only
- Can be accessed by travel arrangers via link on eItinerary
- 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

- 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

• 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
Process Change for Hotel Booking in Concur

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”
UW TravelWise Website Change

New UW TravelWise is hosted by UW System

- Ease of finding information
- Enhanced Search Capability
- Policy Overviews

Agency Specific Webpages

Back to Travel Guides

Please bookmark the new website and visit it for all travel related inquiries/questions.
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
‘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 with any questions.
Q & A