Travel: Students, Candidates, and Guests

Specific requirements for travel arrangement and reimbursement are in place for University travel. The Firstsource Team is one of seven departments consolidated in the ASK Center, and the go-to campus experts for travel booking, reimbursement, and support. We advise our clients on all travel topics in accordance with UW System travel policy and procedure.

- The Firstsource Team in the ASK Center is available to assist students, faculty and staff with travel booking, planning, and reimbursement.
- ORSP offers funding for student travel Contact ORSP for application and processing information at 715-836-3405 or orsp@uwec.edu.
- If you are an undergraduate student who is traveling, consult your faculty lead to help you plan your trip.
- Use the Visitor’s Travel Guide as a guide to book travel for students, candidates and guests. The guide provides both parties with details about transportation, lodging, meals, canceled/rescheduled travel and reimbursement. The guide also includes a log where the traveler can record all trip-related expenses.
- Reference UW TravelWise for travel policy and procedures, Concur Self Booking Tool, and UW Agency Contact Information

NOTE: Graduate students are to follow the guidelines for employee travel and reimbursement.

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Getting Started
If you are an undergraduate student who is traveling, contact your department first for instructions. The Firstsource Team in the ASK Center is available to assist with booking travel and with approved expense reimbursements.

If you are arranging travel through Concur on behalf of the student, candidate, or guest traveler, you must have “travel coordinator” status. Contact the UW-Eau Claire Travel Manager at the ASK Center Email or 715-836-3131, to obtain travel coordinator status.

Use the Visitor’s Travel Guide as a guide to book travel. The Visitor’s Travel Guide provides both parties with details about transportation, lodging, meals, canceled/rescheduled travel and reimbursement. The guide also includes a log where the traveler can record all trip-related expenses.

**Plan and Purchase**

Departments are to pre-pay expenses as often as possible for travelers (i.e. paying for arrangements in advance with a PT card/US Bank Corporate Travel card, cash advances provided by lead staff throughout the trip, etc.). The traveler will personally pay for whatever is not pre-paid by the department and will be reimbursed later when a travel expense reimbursement report is submitted.

**Non-Employee ID**

Employee ID numbers are required for travel authorization and reimbursement. The host department (faculty or assistant) will complete and submit a Non Employee Vendor eForm to obtain an Employee ID for non-employed students, candidates, and guests. The Firstsource team in the ASK Center is able to assist with this process.

The following information is required:

- Full Name
- Permanent mailing address where the reimbursement check is to be sent
- Dates of travel
- Funding string (for example, 000-0-000000)

Once the non-employee vendor ID is created, a notice with the ID will be emailed to the travel coordinator.
Following the trip, the travel coordinator will use this ID to complete an expense report on the traveler's behalf.

**Travel Authorization**

**Pre-approval is required for all travel and related expenses**

Per the Chancellor’s guidelines posted on the May 14 Insider Travel Guidelines, all travel and related expenses through June 30, 2021, are to be pre-approved at the division level. In the spirit of being safe and budget-conscious, the generalized guidelines are intended to strictly limit travel and expenses. The restriction applies to faculty, staff, students, and guests. Virtual event attendance is of budget concern. Please consult with your chair or director to determine the approval requirements for your particular division.

To accommodate a consistent manner of application and approval, requests are to be submitted through the Shared Financial System (SFS) Travel Authorization module.

- The person assigned as Expense Manager will approve the travel authorization request.
- Then the UW-Eau Claire travel manager manually forwards the request to the administrator assigned to head the respective division for evaluation of safety and budget.
- To complete an expense reimbursement report (TER), simply convert the TA to a TER to save time. Attach any approval email with receipts and other supportive documents.
- When completing a PT-log, download and attach the TA and approval email to the log.

**Transportation**

**Flight**

Out of state trips will often include airfare as the mode of transportation. Airfare must be booked through the UW System contracted agency or by using the Concur online booking tool. Travelers must provide the travel coordinator with the following information:

- Legal name of traveler – As it appears on legal, government issued ID
- Date of Birth – TSA requirement, must be provided in order to issue airline tickets
- Dates – Departure and return date
- Times – Preferred times of departure
- Form of payment - Charge cards only, in compliance with your institution's payment policy

Below are options for booking and purchasing airfare for guests:

1. Book airfare for a guest through Concur on behalf of the traveler
   - You can do this by using a university-issued travel card or the traveler's personal charge card
2. The department may call the UW System contracted agency to make arrangements and put the airfare on a university-issued travel card (PT card) or the traveler's personal charge card
3. If you have multiple guests, or will be doing many bookings through the year, consider establishing an administrative group with Travel Incorporated
This allows you to keep a departmental purchasing card on file, and allows the guest to call into the agency to make their own reservations based on the parameters that the administrative group coordinator establishes upon setup.

4. The student traveler may schedule an appointment with the Firstsource Team, 715-836-3131, for assistance to book airfare.

**NOTE:** Airfare is non-refundable if the traveler cancels the visit. The value remains with the traveler and must be paid back to the University if the airfare was pre-paid.

For additional assistance, contact the Firstsource Team in the ASK Center, 715-836-3131.

## Vehicle Rental

Public transportation is often the least expensive mode of transportation, depending on the traveler’s destination. If the traveler does require vehicle rental, is 18 or older, and has an approved VUA, the Big Ten Alliance contract for Enterprise and National Car Rental may be used. If neither Enterprise or National are available, you may use our secondary contract, the State of Wisconsin/NASPO Hertz Contract, which may be used by employees only. For more information, please refer to the contract procedures.

Below are options for reserving a rental vehicle for the traveler:

1. Book the vehicle for a guest through Concur on behalf of the traveler
   - You can do this by using the traveler’s personal charge card
2. When additional airfare and lodging is required, the department may contact the UW System contracted agency to make arrangements on behalf of the traveler and put the vehicle rental on the traveler’s personal charge card.
3. If you have multiple guests, or will be doing many bookings through the year, consider establishing an administrative group with Travel Incorporated
   - This allows you to keep a departmental purchasing card on file, and allows the guest to call into the agency to make their own reservations based on the parameters that the administrative group coordinator establishes upon setup.
4. The student traveler may schedule an appointment with the Firstsource Team to reserve a rental vehicle, either through Email or phone, 715-836-3131.

**NOTES:**

- The UW-Eau Claire student traveler must have Driver Authorization completed and approved prior to driving.
- The UW-Eau Claire student traveler must receive university funding in order to be eligible to rent a vehicle using the contract.
- The charge card used to reserve and pay for the rental must be that of the driver of the vehicle and be presented at the time the vehicle is picked up.
- The person picking up and dropping off the vehicle is required to provide UW System identification, such as the UW System’s tax-exempt wallet card, in order to receive tax exemption.
- Miscellaneous items (Fuel Service/Re-fueling, GPS unit, car seat, etc.) are not reimbursable.
- 12-15-passenger vans are allowed with proper training and approval. Contact Firstsource Team in the ASK Center for more information.
- Receipts for fuel purchased are required if you want to receive reimbursement.

**Driver Authorization**

All UW-Eau Claire drivers, including students, must have prior-approved Driver Authorization regardless of driving a rental or personal vehicle if their driving is business-related.

- Please complete and submit the Driver Authorization application at least ten business days prior to the first day of travel.
- Student driver authorization must be renewed annually. Students authorization expires annually on

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**Lodging**

UW System has identified and contracted with merchants at top UW System travel destinations in the United States. Lodging must be booked through the UW System contracted agency or with the Concur online booking tool, unless staying at a conference-designated hotel. Whenever possible, a UW System-contracted "Most Preferred" hotel is to be chosen for travelers.

The expense for lodging must be within the maximum lodging rate, however, this requirement is deferred when staying at a recommended conference hotel.

Determine the maximum lodging rate with the Lodging/Meal & Incidental Calculator.

The room charge is the only reimbursable expense; and Wisconsin Sales Tax is not to be paid. Other related charges like meals, phone calls, parking, internet, etc. must be personally paid for prior to check-out.

Below are some options for how to book and purchase lodging for the traveler:

1. The accompanying faculty or staff traveler may make arrangements and pay for the student’s room at
2. The travel coordinator may contact the UW System contracted agency to make arrangements and put the lodging on a procurement travel (PT) card or the traveler's personal charge card.

3. The travel coordinator may book lodging for the traveler through Concur and put the lodging on a procurement travel (PT) card or the traveler's personal charge card.

4. The student traveler may contact the Firstsource Team, 715-836-3131, for assistance in reserving lodging.

**NOTE:**

*If the department is paying for the traveler's lodging, the merchant must be contacted for instruction on how to process a "card not present (CNP)" transaction. DO NOT provide credit card information in an email.*

### Meals

The traveler is eligible to be reimbursed for out-of-pocket meals and incidentals in accordance to the state per diem rate and may be limited to the travel funding limit.

- The meal allowance is adjusted to the geographic location of the meal.
- Determine the traveler's meals and incidentals with the Lodging/Meal & Incidental Calculator.
- Receipts are not required for meals.

### Reimbursement

#### Provide Evidence/Receipts

After the trip, the traveler must provide documentation and detailed/itemized receipts for reimbursable expenses, including:

- Agenda/brochure of the event
- Airfare ticket receipt/invoice
- Airline change/cancel fees
- Vehicle rental agreement/receipts
- Rental car gas (fuel service option through enterprise is not allowed)
- Daily personal vehicle mileage
- Lodging receipts
- Conference hotel information, if price exceeds maximum for city
- Conference registration receipt and copy of agenda
- All miscellaneous receipts if over $25
- Receipts for airline baggage, parking, taxis/shuttles, bus/subway, business internet, tolls

For more information on the necessary receipt documentation, visit Receipt Requirements.
Travel Expense Report

To request reimbursement for travel expenses and account for the trip, a Travel Expense Report (TER) is created and submitted.

Below are some options for obtaining reimbursement for the traveler:

1. The student traveler is encouraged to schedule an appointment with the Firstsource Team, call 715-836-3131 or email the ASK Center Email

2. The travel coordinator, as appointed, can complete the expense report on behalf of the travelers.
   - If you are not an alternate for this individual, contact the Firstsource Team in the ASK Center for alternate status.
     - Start the Travel Expense Report in Shared Financial Services (SFS)
     - Please use the following guide How to Start a TER as an Alternate if you are unfamiliar with the alternate process
     - See the TER Header Help Sheet for additional resources

- UW-Eau Claire student employees will receive reimbursement as an ACH deposit in their payroll bank account.
- Non-employees will receive their reimbursement check via USPS at the address provided on the Travel Expense Non-Employee Vendor Setup form 5-7 business days after the TER is approved.

For additional assistance, contact the ASK Center, 715-836-3131 or ASK Center Email