

UWEC 440.A, Requesting Travel and Reimbursement Assistance

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Procedure #: UWEC 440.A

Intent

The intent of this procedure is to provide clear guidelines for requesting assistance from the Firstsource Support Team to book university travel and/or complete reimbursement on behalf of the traveler.

Scope

This procedure applies to requests for assistance for University sponsored travel regardless of traveler affiliation or funding source.

Definitions

Expenses: Relevant travel expenses including, but not limited to, registration, airfare, lodging, meals, gas/mileage, vehicle rental, etc.

Traveler: An individual (employee, student or non-employee) who has been authorized to travel on behalf of the University on official University business or sanctioned purposes. All University travelers are required to comply with UW System and university policies and procedures.

University Sponsored Travel: Travel that is:

- paid for in full or in part by the University;
- paid directly or indirectly by the University;
- organized by the University with participants or sponsors paying;
- organized by others outside the University and paid for by the University; and/or
- sponsored by the University in the form of name, organization, communication, management, staffing, transportation, or space provision

Procedures

- [Requesting Travel and Reimbursement Assistance](#)

Requesting Travel and Reimbursement

Assistance

Step	Action
1.	<p>Spend time planning your trip by considering the following:</p> <ul style="list-style-type: none"> • Are you an employee or student/guest? <ul style="list-style-type: none"> ◦ Employees ONLY: Do you have a Concur profile? ◦ Concur – User Registration form • What is the business purpose of your trip? (Research, Conference, Other) • Prior authorization may be required. Please check with your department. • How are you planning to travel? • What needs to be booked? Be sure to think about registration and ground transportation needs that you will arrange. • What is your destination? • What is your preferred Departure/ Destination Locations, Date and Time? • Is this trip for an individual or a group? • Are other faculty, staff, or students traveling with you? • Will this trip include extra days or personal travel? • How will you pay for your trip? • Who is funding your trip? How much?
2.	<p>Complete the Travel and Reimbursement Information Process (TRIP) form. The traveler, faculty leader or academic department associate should complete the form and are responsible for ensuring it is completed fully and correctly.</p>
3.	<p>Email the completed form to the Firstsource Support Team of the ASK Center (askcenter@uwec.edu).</p>
4.	<p>Make an appointment with the Firstsource Support Team to book your travel by calling 715.836.3131 or emailing askcenter@uwec.edu. Be sure to bring payment, if needed.</p>
5.	<p>After your travel, make an appointment with the Firstsource Support Team to request a reimbursement by calling 715.836.3131 or emailing askcenter@uwec.edu. Be prepared to provide (if applicable):</p> <ul style="list-style-type: none"> • Itemized receipts • Trip agenda • ORSP award letter • Funding string(s)

Resources

[Practice Directive UWEC 440, *Travel and Reimbursement Assistance*](#)

[Travel and Reimbursement Information Process \(TRIP\) eform](#)

[UW-Eau Claire Firstsource and Travel webpage](#)

[UW TravelWise webpage](#)

[Lodging and Per Diem Calculator](#)

[Driver Authorization & Vehicle Use webpage](#)

[Credit Cards \(Procurement + Travel Cards\) webpage](#)

[Concur user registration form](#)

[Receipt Requirements webpage](#)

Procedure Administration

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Division	Finance & Administration
Department	University Accounting
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1.0	January 19, 2023	Initial issuance	Shawn Seuferer