

TRAVEL TIPS

Meals

The State of Wisconsin does not use per diems. Meal claims must be reasonable and necessary and represent the amount actually spent. Maximums for each meal are shown in the Travelers Reference Guide or are available on the Financial Services website.

For a claim to be reimbursed in excess of the maximum, a receipt or detailed charge card slip must be provided, and there must be documentation showing that the cost was incurred outside of the employee's control. This generally means that the employee had no choice in selection of the restaurant or the menu items therein.

If an employee is buying a meal for someone else (who is also doing university business or is an interview candidate), the employee must provide a receipt for both meals and indicate the person's name and explain the business conducted on the Travel Expense Report (TER) to be reimbursed for both meals. Meal maximums apply.

On the TER, meals must be itemized by day - do not use a lump sum amount for the trip.

On any particular day, an employee entitled to reimbursement for two or more consecutive meals may divide claims between meals as desired, as long as the maximum is not exceeded. Each day is considered separately for application of this policy. If meal maximums are not reached on one day, the savings do not accrue and cannot be applied to meal or other costs incurred on another day.

Departure/Return Times

breakfast, departure must be **before** 6:00 a.m.

lunch, departure must be **before** 10:30 a.m. and return **after** 2:30 p.m.

dinner, employee must return **after** 7:00 p.m. or leave from headquarter city for overnight travel **before** 6:00 p.m.

These times are applied literally, so please be sure you record accurate times for depart and return.



1. Purchasing Airfare for a University Employee or a Student

Fox World Travel is the State's contracted on-line travel agency. You will need to create an on-line profile to use the system. The website for travelport is <http://portals.foxworldtravel.com/state/> or www.travelport.net. If you plan to book a flight on-line, you must start with this vendor. If you find a price that is better than this vendor, you must get a quote from this vendor first. Be sure you are comparing the same information on flights dates and times. The State has prohibited the use of Orbitz.

There are two travel agencies in Whitewater that you may wish to do business with instead of booking on-line.

When searching for airfare you cannot give preference to a particular airline, or require a non-stop flight. If the airfare is over \$500, be sure to obtain additional quotes and purchase the lowest reasonable fare. If your conference kicks off with an opening reception the evening before it begins, you should travel on the day of the reception. If your conference ends at noon on the last day, you would be expected to travel that day if flights were available to get you home at a reasonable hour (before 10PM)

If you are considering two different flights because a Saturday night stay is less expensive, you must have documentation of that if you decide to extend your stay and want to be reimbursed for the extra costs. You must show the costs for both flights, specifically they must show same times, same airline, same date of booking to verify the extra night is why the fare is cheaper. You must also show the calculation of the flight cost plus costs incurred as a result of the extra day's stay-hotel, meals, etc.

Payment for airline tickets must be made using either a University liability Travel Procurement Card or an employee liability US Bank Corporate Card. If using a Travel Procurement Card, remember to include all procurement card purchases on your TER in the shaded "Direct Billed Expenses" column and attach a copy of the procurement card receipt and itinerary.

Documentation needed for airline tickets include the original ticket receipt and itinerary if you are being reimbursed for this cost (copy of these if already paid on a university procurement card). If changes are made after the purchase, the original ticket receipts and all the subsequent documents are required to show all costs. If your ticket cost more than \$500.00 you will need to provide the additional quotes you obtained, unless you have used our online agent, Fox World Travel. They will do this for you so no quote is necessary. These quotes should be on the same (similar) dates as the ticket purchased to demonstrate you have selected the lowest reasonable airfare.

2. Purchasing Airfare for a Guest Speaker, Interview Candidate, etc

There are two methods to purchase airfare for a guest speaker, interview candidate, etc.

- The speaker or candidate can make arrangements for their own airfare and request reimbursement from the University via a TER. They cannot be reimbursed for first class airfare or business travel. The department should obtain prices ahead of time to ensure the lowest fare is being obtained.
- Arrangements can be made using the department procurement card and the contracted on-line agency or a travel agency.

Lodging

1. Employee Lodging

University employees must pay for their lodging using either a Travel procurement card or a US Bank Corporate card.

The employee must provide an original itemized lodging receipt if claiming reimbursement, or a copy of this if paid by a Travel Procurement card. Expenses are itemized by day on the TER.

Some cities are considered High Cost cities. Different maximums apply to these cities. Before traveling check the Travel website to see if higher rates apply to your travel destination.

If you will be attending a conference and staying at the conference site, higher reimbursement for hotel costs are permitted. This does not apply to hotels simply recommended by the conference sponsor, it must be the conference site. If this is the case, provide a copy of the brochure, program or registration info that specifies that the hotel is the conference site.

With the exception of Milwaukee, Racine and Waukesha counties where the lodging maximum is \$80, the maximum amount reimbursable per day for in state lodging is \$70, excluding tax. The maximum amount reimbursable per day for out-of state lodging is the greater of \$70 or the rate for specific high cost cities.

If you are sharing a room with another employee, one employee may pick up the entire room cost, but both must indicate this on their respective TERs.

2. Lodging for Speakers, Interview Candidates, etc.

- A. The hosting department can make arrangements for guests; i.e. speakers, candidates, etc. The lodging maximum of \$70 per night applies. The following methods should be used for payment.
1. Arrange with the hotel to charge a university Travel Procurement Card for the lodging. The University will pay for lodging only, no movies, room service, etc, so the guest will need to pay for these charges personally. NO taxes should be charged, as we are tax exempt (Tax exempt number is ES40706). The \$70 lodging maximum per night applies.
 2. The Guest pays the lodging bill and then requests reimbursement on a TER, attaching an original, itemized lodging receipt. The \$70 lodging maximum per night applies. Since the person does not have a tax exempt card, the department should still make the reservation and provide the tax exempt information at that time so that taxes are not charged.

Vehicles



Mileage Reimbursement

When claiming mileage on the Travel Expense Report (TER), for each day include the times departed and arrived; indicate the starting point and destination and the miles. Provide detail as to why you are traveling - do not use "attending a meeting" or "attended a conference" - give the name of the conference/meeting. If you are on a multi-day trip, a starting day and time and an ending day and time are sufficient, with the total mileage for the trip recorded. As of 12-1-07, all mileage is paid at one rate. See the travel website for the current rates.

Additional amounts can be claimed for:

use of a personal vehicle when used as an emergency vehicle or when the installation of special equipment is required, such as the pulling of trailers, or under conditions which cause excessive wear or depreciation.

transporting two or more passengers in addition to the driver in a privately owned vehicle, provided the passengers are also engaged in UW business. The names of employee passengers must be listed on the TER of the driver when seeking reimbursement in excess of the standard reimbursement rate.

handicapped persons who use a privately owned, specially equipped van on UW business.

use of privately owned motorcycles on UW business.

Charges for repairs, tow service, locksmith services, jump starts, lubrication, traffic citations, parking tickets, etc. are the employee's responsibility and are not reimbursable.

At the employee's request, reimbursement for gasoline cost in lieu of using the mileage rate will be allowed if receipts are provided and the total claim does not exceed the mileage rate that would have been allowed.

Keep in mind when claiming mileage, the beginning point to the destination must be the most cost effective for the University. Whitewater is considered the headquarter city for all employees, which means that employee travel to Whitewater from home is not reimbursable. Further, if the employee lives in Milwaukee and goes to Racine on business, since the shorter distance is from the employees home to Racine, it would be most cost effective to leave from Milwaukee and go directly to Racine, rather to come to Whitewater first, so the employee would be paid the shorter distance. If however, the employee lived in Madison and traveled to Racine from home, it would be more cost effective to go to Racine from Whitewater, so the employee would only be paid the distance from UWW to Racine.

Mileage from UWW to most Wisconsin cities is listed in a chart on the Travel website. This is the mileage used to review TER mileage. If excess mileage is claimed on a trip, an explanation should be noted, i.e. picked up passenger also going to airport; detour; etc.

Rental Vehicles

A rental vehicle may be used in situations where it is the most cost efficient means of transportation, or when the efficient conduct of UW business precludes the use of other means of transportation. Be prepared to justify the need for a rental car, as most often shuttle services are available at reasonable prices.

All rental car costs must be paid for with a Travel procurement card or US Bank Corporate card. When obtaining reimbursement for a rental vehicle, the original rental agreement and receipts for gas purchases must be submitted. Employees should fill the gas tank before returning rented vehicles unless the contract specifies other options that are less costly to the UW.

The vehicle rented should be reasonable in terms of size, cost, number of passengers and cargo to be transported. Claims for reimbursement of other than subcompact, compact or midsize models for reasons such as three or more passengers, bulky equipment, etc., must be documented in writing. Only individuals involved in State/UW business shall be included in the count.

The State of Wisconsin and the Big 10 have contracts with Enterprise National and Hertz rental companies for discounted rates that include insurance coverage. Employees who rent vehicles must use a contract vendor. All contract rates for domestic rentals include free collision and liability insurance, therefore, if such coverage is inappropriately offered by the rental agent, it should be declined. The contract number and if in-state, tax exempt number, must be provided to the vendor.

If a contract vendor cannot provide a vehicle, another vendor can be used. The TER must state that the contract vendor could not provide service. If renting from a non-

contract vendor, the collision/theft damage insurance (LDW) is reimbursable and must be purchased. If you are charging the cost of the rental to a UW Travel card, insurance coverage is provided with some limitations (be aware of what is provided before you rent so excess costs are not incurred). Reimbursement for the cost of renting from a non-contract vendor is limited to the lowest contract rate that would have been incurred had a contract vendor been used.

For vehicle rentals in foreign areas, collision/theft (LDW) insurance must be purchased with both contract and non-contract vendors.

Information about the contract vendors follows:

Enterprise (For Rentals in Wisconsin only)

Booking Code: For Whitewater WI24013

Special Services: Will pick up employees at workplace and transport to and from rental location or will provide free parking of employee's car at rental location.

National Car Rental

Booking Code/ID # 5004463 UW business only

Booking Code/ID # 5766241 for combined business and personal trips, or when including non-UW passengers

Perk: Emerald Club: Available to all UW travelers. Offered at most major airports, the service takes you away from counter lines directly to the Emerald Aisle. Emerald Club members drive full-size cars at mid-size prices. Special Services: Provide a 24 hour, toll-free phone number to obtain road service assistance.

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