



University Business Travel Procedure

Intent:

The purpose of this Procedure is to establish clear guidelines in support of travel-related administrative processes.

Scope:

This Practice Directive and Procedure applies to UW-Whitewater affiliated travelers intending to travel outside of the University campuses (Whitewater and/or Rock CIS) for work-related events or activities.

Definitions:

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 purpose. All University travelers are required to comply with 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.

Business Travel. Travel for the purpose of conducting business for the sole benefit of the University.

For the purposes of this Procedure document, “Business Travel” includes the following location scopes and timelines: In-State Travel, Out-of-State Travel, Overnight Travel, and Day Trips such as Local Conferences, Off-Campus Meetings, Inter-Campus Meetings, and Events. It is the responsibility of the traveler to report their own activities to their delegated approval authority(ies) as necessary and appropriate.

Expenses. Relevant traveling expenses include, but are not limited to, airfare, lodging, meals, gas, etc.

Day Trip. For the purposes of this Procedure document, “Day Trip” refers to business travels that do not require overnight stay. Some examples include: a conference in Madison, an event in Milwaukee, or training in Eau Claire.

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Procedure:

The University of Wisconsin-Whitewater expects all employee business travelers to comply with appropriate pre-travel authorization procedures before their trip, and submit their expense report via the [Travel E-Reimbursement](#) within ninety (90) days of their travel.

Authorized business-related travel should utilize funds and resources prudently. Travelers should understand and follow UW System travel policies, and report travel effectively and efficiently to ensure the University meets reporting requirements. In turn, business travel expenses will be reimbursed by the University when these expenses are reasonable, necessary and meet requirements.

Driver Authorization & Vehicle Use

All employees must be driver authorized to receive reimbursement for business travel.

Visit the [Driver Authorization website](#) to learn more about the driver authorization process and access additional resources.

Pre-Travel Expectations

Day Trips: Travelers do not need to obtain pre-approval for business travel that is a day trip (i.e. Conference in Madison, or Event at UW-Milwaukee), *unless their department requires it in support of their own best practices.*

Travelers who do not need pre-travel authorization are encouraged to notify their direct supervisor/approving authority via email about the trip, because this notice can be critical for departments to plan around certain anticipated absences in case of emergency or other situations that may arise.

All Other Trips: Travelers must submit information through the [Travel E-Reimbursement](#) process for pre-travel authorization approval. See below for more information.

Step	Action
1.	Go to Financial Services Travel web page .
2.	Click on the "Sign Into E-Reimbursement" link.
3.	Sign in using UW-W credentials.
4.	Select the "Travel Authorizations" tile.
5.	Select "Add Travel Authorization".
6.	Input the appropriate information for the required fields.

7.	Review and Submit your request.
8.	Travel.
9.	Submit Travel E-Reimbursement request upon your return, using the “Expenses” tile on the Travel E-Reimbursement homepage.

Employees using the pre-travel authorization process need to complete their submission in a reasonable timeframe, **ideally within two (2) weeks prior to their departure.**

Note: If a travel authorization is requested too close to, or after, the departure date then travel reimbursement may be denied by the direct supervisor/approving authority. This determination should be made on a case-by-case basis by the direct supervisor/approving authority.

Post-Travel Procedures

Active employee travelers must utilize the [E-Reimbursement System](#) to submit travel expenses for reimbursement.

If you are not an active employee traveler and are expecting to receive a reimbursement from UW-Whitewater for travel expenses, please check with your campus contact to determine the status of your expense reimbursement.

Travel Exceptions

In accordance with UW System Policy, travel expense reports should be submitted within ninety (90) days after the travel date to be considered compliant. Failure to do so may result in no reimbursement. Exceptions to this requirement, however, are reserved for extenuating circumstances which are reviewed on a case-by-case basis by the University Controller and approved by the Vice Chancellor of Administrative Affairs or designee.

If you believe you have an extenuating circumstance, and would like to request an exception, you may submit an [Expense Reimbursement Policy Exception Request](#).

Exceptions can include:

Serious Illness or Health-related Emergency

If extenuating circumstances exist, such as a health-related situation or emergency, that prevented a person from submitting the report on time the employee may be granted an exception for approval (non-taxable, if applicable).

Other

If extenuating circumstances exist **but should not** have prevented a person from submitting the report on time (i.e. lack of familiarity with UW System Travel expectations – new employee, or other unforeseen circumstance – organizational changes), the following may occur:

1. The employee may be granted a one-time exception. Their travel expense report will be approved and taxable.

- The employee must attend a [Travel 101 informational Session](#) before submitting another travel expense report. Visit the [Travel Information webpage](#) for more information about training opportunities.

An employee who continues to submit travel expense reports past ninety (90) days may be denied an exception, not allowed to travel on university business, and/or may have their travel cards revoked or suspended.

Resources:

[University Business Travel Practice Directive](#)

Administration:

Approval Details

Approval Authority:	UW System Administrative Policies: Administrative Policy 405 (formerly 1200 (ANS)): Travel and Expense – General Travel & Expense Policy , Administrative Policy 410 (formerly 1201 ANS)): Purchase & Payment of Business Air Travel , Administrative Policy 415 (formerly 1202 (ANS)): Purchase & Payment of Lodging , Administrative Policy 420 (formerly 1203 (ANS)): Travel & Expense – Meal and Incidental Expense (M&IE) Per Diem Allowance Reimbursements , Administrative Policy 425 (formerly 1204 (ANS)): Use of Personal Vehicles, Rental Cars and Fleet for Business Transportation , Administrative Policy 430 (formerly 1205 ANS)): Travel & Expense – Purchase & Payment Miscellaneous Travel Expenses , Administrative Policy 435: Headquarter City & UW System Sponsored Events Policy , Administrative Policy 312 (formerly F6): Official Functions , Administrative Policy 235 (formerly F31): Personal Services Payments. Regent Policy Documents: Regent Policy Document 21-5: University Travel Policies
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Revision History

Version	Revision date	Description of changes	Author
1.0	07/01/2019	Procedure established	Quality Assurance Improvement Manager

Contact Person/Unit

Contact Person/Unit:	University Controller
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Keywords

Keywords:	University Business Travel, University Travel, Business Travel, Employee Travel, Out-of-Office, Day Trip, In-State Travel, Out-of-State Travel, Overnight Travel, Travel Reimbursement, Travel Expense, Travel Expenses, Travel Reporting, Travel Authorization, Travel Exception, Travel Expense Report, Travel Expense Reports, TER, TERs, Travel E-Reimbursement, Reimbursement Exception, Travel 101, Travel Training, Travel, Flight, Hotel.
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