



NEW TRAVEL REGULATIONS EFFECTIVE 10/5/15



GENERAL/MISCELLANEOUS

- **University will not reimburse for travel expenses after 90 days from return trip date.**
- Any travel related purchase that is not in accordance within travel policy will be deemed unauthorized and will not be reimbursed.
- All expenses must be reflected on Travel Expense Report (TER) including pre-paid expenses to create full picture view of trip for auditors
- Passports will no longer be reimbursed

Meals & Incidentals

- Pay Meal & Incidentals (M&IE) as a daily per diem allowance based on federal rates for individual travelers based on city you spend the night in. Per diem only allowed for full/24 hours of travel
- 75 percent of the daily allowance on 1st/last days of travel
- Travelers must deduct any provided meals from the daily per diem allowance (20% - Breakfast, 30% - Lunch, 50% - Dinner)
- No leave/return times are required
- No receipts required
- Same day, **tax reportable meal allowance of \$15 for day trippers without overnight stay** when expected to incur out of pocket costs. No same day trip allowance paid if traveler receives any provided meals.

Meals & Incidentals

- Incidentals are defined as follows:
 - Fees and tips
 - Laundry
 - Dry cleaning and pressing of clothing
 - Bottled water for foreign locations
 - Transportation between place of lodging or business to obtain meals when not obtainable within the immediate vicinity.

Lodging

- ▣ Rates for single/standard lodging will be paid/reimbursed for the location and dates of stay.
 - In-State – Maximum federal rate (excludes tax and travelers responsible for obtaining tax exemption)
 - Out of state - Maximum will be at 125% of federal rate. (Maximum rate excludes tax)
 - International – Maximum federal rates (includes Alaska, Hawaii, US Territories). Maximum rate includes tax.
 - Externally sponsored conferences - Conference site hotel now includes any conference recommended lodging options and will be reimbursed at actual cost.
 - Internally sponsored (University) conferences - Maximum federal rate based on location

Lodging (cont'd)

- Current policy prohibits the use of online lodging brokers, like Airbnb and the more familiar Hotels.com, Expedia, Priceline, Travelocity, etc. and will no longer be reimbursed
- Maximum reimbursement rate is based on the city you spend the night in and is calculated via the rate calculator.
- Conference site hotels can be utilized over the high cost city maximum – proof of conference site is required and department approval needed

LODGING BOOKING METHODS

Booking methods allowed:

- Online with Concur booking tool
- Fox Travel agents
- Directly with hotel property
- Conference site or recommended conference site hotels

SPONSORED EVENTS

- Food & beverage costs related to hosting candidates or recruits are part of this policy and rate structure as well as receipt and other documentation requirements.
- Faculty & staff that elect to pay for group/team meals during the course of travel or for other identified business purposes are to follow the rate maximums and receipting requirements of this policy.
- An individual traveler's personal meal & incidental expense (M&IE) per diem allowance **cannot be used to pay for items related to University Sponsored Events** or any other related business entertainment activity that includes meals, food or beverages whether the expense is incurred in travel status or at the headquarter location.
- Travelers cannot claim M&IE on the behalf of another person. (i.e. co-worker)

Sponsored Event Rates

- Itemized Receipts required
- New Rates:

In-State

- Breakfast - \$12
- Lunch - \$18
- Dinner - \$30
- Breaks - \$10

Out of State

- Breakfast - \$15
- Lunch - \$23
- Dinner - \$37
- Breaks - \$10

GROUP TRAVEL

- Reminders when using Fox Premier to book airfare:
 - Provide Preferred travel dates
 - Budget
 - Routing
 - Destination
 - Airline Preference
 - Any Deviations

Airfare

- Effective July 1, 2015, all airfare must be booked using the Concur (online) self-booking tool, Fox World Travel Agency, or Debbie Talbott (UWSA Travel Agent). Airfare booked outside of the program will no longer be reimbursed.
- This includes domestic and international airfare for both individuals or groups for all of the following persons:
 - Employees
 - Students
 - Guests (i.e. Interview Candidates, Speakers, Entertainers, etc.)

TRAVEL RESERVATION REQUEST FORM

UW Oshkosh Travel Reservations Request

☐ Guest ☐ Student ☐ Job Candidate

**For student travelers: The student should contact their sponsoring department to initiate a booking.
The sponsoring department should submit a student travel request form on their behalf.*

1 – Traveler Information

Name (first, middle, & last):

This is how it appears on traveler's government issued ID

Gender:

☐ Male

☐ Female

Phone Number: (include area code)

☐ Home

☐ Work

☐ Cell

Email Address:

Date of Birth:

Passport Number:

TSA Redress #:

TSA Pre✓

Must be collected from traveler prior to ticketing. In the event that you are unable to collect this information, we will contact the traveler directly to obtain the required information prior to issuing tickets. Please Note: Any delay could cause a fluctuation in pricing and flight availability.

Effective 2009, in accordance with the secure flight program, the Transportation Security Administration requires airline carriers to collect this information to ensure it is added to reservations for pre-flight screening. You must provide this information for the travel reservationist to complete your request. For more information, visit www.tsa.gov.

2 – Provide Flight Information

☐ Round Trip

→ Flight Information →

☐ One-Way

From (City, State):

To (City, State):

Departure Date:

Return Date:

3 – Attach the airfare itinerary containing price information to this completed form.

4 – Obtain Account Authorization

UW-O Account to be Billed:

Authorized Signature: _____

5 – Send this original form to Michelle Highley, highlevm@uwosh.edu, 920-424-0837

Miscellaneous Expenses

- Miscellaneous expenses include:
 - Registration Fees
 - Phone/Business Internet
 - Taxi service/Shuttle
 - Parking
 - Gas for rental car
- All miscellaneous expenses can be paid for with
 - Cash
 - Personal credit card
 - Personal liability corporate card
 - Need receipts for anything \$25.00 and over

PERSONAL VEHICLE MILEAGE

- Standard rate increases to \$.575 per mile
- Motorcycle rate increases to \$.545 per mile
- Gas receipts will not be paid in lieu of standard mileage rate

Vehicle Rentals

- Big Ten Contract with Enterprise and National is required for employees and non-employees over the minimum driving age of 21.
- WSCA contract with Enterprise, National and Hertz must be used by employees and students between the ages of 18-20 (youthful driver)
- Do not purchase the FSO (fuel service option) or refueling service at rental location. It is a non-reimbursable expense
- Tax exemption for in state car rental
- GPS is a non-reimbursable expense



DOA Minimum Driving Standards

- Employees and students who are required to drive on University sponsored business must be authorized to drive. Anyone who is not an authorized driver will not be reimbursed for mileage or rental car.
- The Driver Authorization form can be found on UW Oshkosh's travel page under forms.
- Periodic checks will be made on every travelers driving record.

Corporate Travel Card

- Any employee who travels on UW Oshkosh business and will be reimbursed via any university account needs to acquire the Corporate Travel Card.
- Credit Card application process takes approximately **one** week (card stays open 22 months with no activity)
- Pre-payments for airfare and registration/conference fees are allowed

Corporate Travel Card

- Employees must use the corporate travel credit card to purchase all of their travel.
 - Airfare
 - Lodging
 - Car Rental
 - Meals



Departmental Purchasing Cards can be used to purchase registration.

NOTE: Student and guests (i.e. interview candidates, speakers, entertainers, etc.) may use a personal credit card.

Future changes

- Travel E-reimbursement – electronic filing of travel expense reports
- Group Travel Procurement Policy (lodging, ground transportation, program services, etc.)
- Sponsored Events Policy/Procedure
- Re-location (Moving) Policy

Rate Calculator

- TravelWise rate calculator is the “official source” for rates pre-trip
- Users look up the lodging and meal/incidental maximum rates based on city and dates of travel
- Calculator will automate the math and produce printable tabulation
- Printed copy of tabulation required for all TER's

M&IE Calculator

Lodging Maximums and M&IE Per Diem Allowance Calculation

Start Over



Trip Details

Is this trip for a single day?

☐ Yes ☐ No

Lodging Maximums and M&IE Per Diem Allowance Calculation

Start Over

Single Day Rates

DAY TRIP MEAL ALLOWANCE

Based on the preliminary questions you answered above, you do not qualify for the day trip meal allowance.

Day trips that do not require an overnight stay are not eligible for a M&IE per diem allowance. By University policy, those travelers that incur meal expenses for a day trip will be reimbursed a flat \$15 per day regardless of leave/return times. The \$15 is tax reportable to the traveler and no receipts are required.

Travelers that do not incur out-of-pocket costs or have any meals provided for their day trip travel are not eligible to receive any meal reimbursement, including the day trip allowance.

Start Over

Lodging Maximums and M&IE Per Diem Allowance Calculation

Start Over

Trip Details

Is this trip for a single day?

☐ Yes ☐ No

Lodging Maximums and M&IE Per Diem Allowance Calculation

Start Over

Select Destination

Country

United States ▾

State

Wisconsin ▾

City

Madison (Dane County) ▾

Note: If your destination city is not found in the list below,
please select the next closest city in the listed information above.

Next Step

Lodging Maximums and M&IE Per Diem Allowance Calculation

Start Over

How long will you be at Madison (Dane County)?

Do you have another stop after Madison (Dane County)?

☒ No ☐ Yes

Date you are going to Madison (Dane County)

Date you are leaving Madison (Dane County)

Previous Step

Next Step

Lodging Maximums and M&IE Per Diem Allowance Calculation

Start Over

Provided Meals

Please select any provided meals for each day of your trip.

Day 1 - Mon Oct 19 2015

- ☐ Breakfast
- ☒ Lunch
- ☐ Dinner

Day 2 - Tue Oct 20 2015

- ☐ Breakfast
- ☐ Lunch
- ☐ Dinner

Day 3 - Wed Oct 21 2015

- ☒ Breakfast
- ☐ Lunch
- ☐ Dinner

Previous Step

Verify Added Locations

Lodging Maximums and M&IE Per Diem Allowance Calculation

Start Over

Please verify all of the location information below is correct, and then click the Calculate Rates button. If the information is incorrect then please click the Start Over button to re-enter your trip locations.

Madison (Dane County) WI - UNITED STATES

Location Dates: 10/19/2015 - 10/21/2015

Provided Meals

Mon Oct 19 2015: Lunch

Tue Oct 20 2015: none

Wed Oct 21 2015: Breakfast

Start Over

Calculate Rates

Lodging Maximums and M&IE Per Diem Allowance Calculation

[Start Over](#)

Date	Lodging Maximum	M&IE Per Diem Allowance	Location	Provided Meals
10/19/2015 (Mon)	\$127.00	\$32.10	Madison, WI (Dane County)	✗ Lunch
10/20/2015 (Tue)	\$127.00	\$59.00	Madison, WI (Dane County)	
10/21/2015 (Wed)		\$36.15	Madison, WI (Dane County)	✗ Breakfast

Location Lodging Maximum: \$254.00*

Location M&IE Allowance: \$127.25*

Lodging Maximum (All Locations): \$254.00*
Total M&IE Allowance (All Locations): \$127.25*

Lookup Date: 09-28-2015 02:31:25 PM

✗ = Provided Meal Included

**Disclaimer: The UW TravelWise calculator is the official source of University travel rates and should be used to estimate travel maximums prior to making trip arrangements. Actual lodging maximums and M&IE Per Diem allowance calculations are based on the entry of month/date/location of travel. Users are advised that rates may change between the dates that are obtained pre-trip and post-trip reimbursement. Reimbursements are based on the date and rate that the expense was incurred. Please contact your department travel coordinator or institution's travel manager with further lodging/M&IE Per Diem questions.*

Print Rates 

How Are My Rates Calculated?

[illegible]

Assistance

- Contacts

- Michelle Highley (0837) highleym@uwosh.edu
- Nicole Richter-Smith(1309) richtern@uwosh.edu