

# TRAVEL POLICY

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For complete UW policies, please visit:

<http://www.bussvc.wisc.edu/acct/policy/ppindex.html>

## **TRAVEL: LODGING INFORMATION**

### **When Booking Rooms:**

1. Reimbursement is limited to the single rate for a standard room. Employees of the same gender traveling together are encouraged, whenever feasible, to share lodging accommodations.  
\*If room is shared, the reimbursement may be divided equally. If it was paid by one person, the name of the other individual(s) must be provided.
2. Maximum rates: In Wisconsin the maximum amount per day for lodging is: \$62 (In Milwaukee, Racine and Waukesha counties, the maximum is \$72). For out of state visit: <http://www.bussvc.wisc.edu/acct/travel/storefront/domesticLodgingMax.html> to find the correct per diem for the place you are visiting. \*See Exceptions if over per diem.
3. Expenses for lodging at facilities which are not licensed as a hotel, motel, campground or tourist rooming house are generally not reimbursable.
4. If the lodging is within 50 miles of your home or UW-Madison campus, you will need prior written justification and supervisor approval for reimbursement.
5. Corporate, educational and government rates are available at many hotels/motels. Employees should, whenever possible, use contract properties and should request the lowest applicable rate available when making reservations  
\* <http://vendornet.state.wi.us/vendornet/travel/LodgingInfo.asp>
6. Use the following self booking sites if you book online: [www.hotelstravel.com](http://www.hotelstravel.com) , [www.lodging-wi.com](http://www.lodging-wi.com) , or [www.tourism.state.wi.us](http://www.tourism.state.wi.us)

### **Before Leaving:**

1. UW employees traveling in-state on official business should avoid the payment of tax on hotel/motel rooms by providing written documentation at check-in/check-out that they are traveling on UW business. <http://www.bussvc.wisc.edu/acct/travel/storefront/taxexempt.doc>

### **While Traveling:**

1. Tips and gratuities to hotel employees are reimbursable up to \$2.00 per night stay. Claims for higher amounts must be justified and supported by receipts.
2. An employee who is required to remain in one location for an extended period is expected to find lodging at reasonable weekly/monthly rates.

### **Receipt Information:**

1. Must have an original, itemized receipt. If you do not have the original, a faxed copy may be acceptable when properly justified in writing.

### **Exceptions:**

1. Any amount in excess of the maximums must be accompanied by a receipt and an explanation of the reasonableness of such expense.
2. An employee may stay at the conference site where lodging exceeds the maximum. Documentation corroborating that the site selected is the conference hotel is required. The employee's selection of a hotel from a list of properties recommended by the conference organizer is not in itself sufficient justification for exceeding the lodging maximum.

## **TRAVEL: FLIGHT INFORMATION**

### **When Booking flights:**

1. Book a flight with an American Flag Carrier.

#### **Major U.S. Flag Air Carriers:**

Airtran Airways	Continental Airlines	Northwest Airlines
Alaska Airlines	Delta Airlines	Southwest Airlines
America West Airlines	Frontier Airlines	Trans World Airlines
American Airlines	Hawaiian Airlines	United Airlines
American Trans Air	Midwest Express	US Airways

\*If you cannot book your flight with a Flag Air Carrier, please visit <http://www.bussvc.wisc.edu/acct/policy/travel/international.html> for instructions, or talk to Crystal BEFORE booking your flight.

2. When airfare is \$500 plus, two quotes from a travel agency or an airline are required.
3. When leaving or returning on a Saturday or Sunday to obtain cost savings in fare, provide total cost comparison and where it was obtained.

These are much easier to take care of when reservations are made. If you do not want to provide the quotes or the cost comparison, please tell Crystal when you reserve your flight so she can look them up in the same week as when you book your flight for comparable rates.

4. Use the following self booking sites if you book online. [www.travelocity.com](http://www.travelocity.com), [www.priceline.com](http://www.priceline.com) or [www.expedia.com](http://www.expedia.com).

### **Receipt Information:**

#### **Needed Information:**

Traveler's Name

Destination

Departure and/or return dates

Amount of fare

Routing

Class of travel (UW will not reimburse premium/first/business class airfare)

#### **Qualifying Receipts:**

1. The original "Passenger Receipt" plus any applicable original travel agency invoice/itinerary.

IF original Passenger Receipt is not available:

2. A reasonable copy or computer printout (internet/email confirmation) containing above information AND proof of payment, such as a credit card statement or check will be acceptable.

### **Fees for Changed Tickets:**

Provide an explanation for any fees charged for changing a non-refundable ticket, e.g., departed early to save on meals and lodging, dates of meeting changed.

## **TRAVEL: GROUND TRAVEL INFORMATION** (BUS, TAXI, RENTALS, ETC.)

### **BUS**

1. Reimbursement shall not exceed lowest cost of the most reasonable form of other public transportation.
2. Receipts are required for between city travel and are to be attached to the TER.

### **TAXI/AIRLINE SERVICES**

1. Reasonable and necessary charges for taxi and airline limousines, including tips at a maximum rate of 15% of the charge, are reimbursable when other modes of travel are not available or practical.
2. To avoid unnecessary taxi expenses, employees should utilize regularly scheduled airport bus or limousine service between terminal facilities and hotels, many of which offer complimentary shuttle services.
3. The starting point, destination and purpose should be indicated on the TER. Receipts must be provided if the one-way fare exceeds \$25.

### **TRAINS**

1. Travel by train must be limited to coach, if available, unless overnight, where accommodations must be limited to a roomette.
2. Reimbursement shall not exceed lowest cost of the most reasonable form of other public transportation.
3. Receipts are required for between city travel and are to be attached to the TER.

### **VEHICLE RENTAL**

1. Reimbursement is limited to the contract, midsize rates. Both Enterprise and National have State contracts for rentals in Wisconsin. National has the State contract for out-of-state and foreign rentals.
2. Original receipts are required for reimbursement for purchase of gasoline regardless of the amount.
3. Employees who rent vehicles must use the State's contract vendors unless there is documentation to support that a contract vendor could not provide the needed service, 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.
4. Most rentals from contract vendors include free collision and liability insurance; therefore, such coverage, if inappropriately offered by the rental agent, should be declined. If it is necessary to rent from a non-contract vendor, or if the contract vendor does not provide insurance for that location, collision and liability insurance must be purchased. Employees should verify that the State/UW's contract ID number is referenced on the rental agreement to assure contract coverage. All other types of insurance are not reimbursable.
5. Additional charges incurred for personal use by the employee when using a rented vehicle are not reimbursable.
6. The original rental agreement and receipts for gas purchases must be submitted for reimbursement.

**Note:** When renting vehicles within the state of Wisconsin for business purposes, employees should provide the vendor with our tax exemption certificate to avoid being charged for state, county and local taxes. Taxes on vehicle rentals may be avoided in several other states.

## PERSONAL VEHICLE USE

### **TRIP LENGTH:**

#### **Under 300 Miles**

1. Reimbursement is \$0.425 per mile for privately owned cars. (Motorcycle reimbursement rate is \$0.212 per mile. Reimbursement for Mopeds and Bicycles is not authorized.)

#### **Over 300 Miles**

1. If taking traveler's own privately owned car the reimbursement is only \$0.32 per mile. To receive \$0.425 per mile reimbursement for round trips over 300 miles, attach non-availability slips from both the UW Car Fleet Office and the DOA Car Fleet Office.

### **DURING TRIP:**

1. The daily starting point and destination should be stated on the TER. An explanation must be provided for mileage in excess of normal map mileage.
2. Parking charges incurred at the employee's permanent work site are not reimbursable. Other parking charges, tolls, etc., incurred while on authorized official business are reimbursable. Receipts are required for claims in excess of \$25.00.
3. Charges for repairs, tow service, locksmith services, jump starts, lubrication, traffic citations, parking tickets, etc., are the employees' responsibility and are not reimbursable.

### **Exceptions:**

1. An additional 1¢ per mile may be reimbursed to an employee for the 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.
2. An additional 1¢ per mile may be reimbursed to an employee for 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.
3. An additional 4¢ per mile may be reimbursed to an employee when a privately owned vehicle is operated off the roadway (construction areas, etc.).
4. Persons with disabilities who use a privately owned, specially equipped van on UW business, shall be reimbursed at the rate of 60 ¢ per mile. When a state-owned van, specially equipped for disabled employees is available, the reimbursement rate shall be 55¢ per mile unless a certification of non-availability is provided or blanket approval has been granted under the ADA procedures. Please contact your Human Resources area for information on ADA accommodations.
5. 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.

**\*\*Note:** If you are a new employee or have never driven a fleet vehicle, you will need to be authorized to drive by the Office of Risk Management. Please refer to the Risk Management website regarding driver authorization guidelines and forms:

[http://www.bussvc.wisc.edu/risk\\_mgt/drivetable.html](http://www.bussvc.wisc.edu/risk_mgt/drivetable.html)

**\*\*Remember that you must be listed on the website in order to even reserve a vehicle, so advance planning is advisable.**

## **TRAVEL: MEAL INFORMATION**

### **While Traveling:**

#### **1. Departure times for meal eligibility while in travel status**

\* Breakfast, provided the employee leaves home before 6:00 a.m.

\* Lunch, provided the employee leaves his/her headquarters before 10:30 a.m. and returns after 2:30 p.m.

\*Dinner, provided the employee returns from travel status after 7:00 p.m. or departs his/her headquarters for overnight travel before 6:00 p.m.

2. Meals already included in the cost of conference registrations, lodging, served on board airplanes, etc., are not separately reimbursable and are not to be included in this calculation.

3. Meal Maximums are listed below. For international travel, visit:

[http://aoprals.state.gov/web920/per\\_diem.asp](http://aoprals.state.gov/web920/per_diem.asp) to find the correct per diems – this will tell you the per diem total per day. The breakdown is: 20% Breakfast, 30% Lunch, 50% dinner. Be sure to correct the date on top to match the travel date.

4. Tips are reimbursed to the maximum of 15% of the charge of the meal.

### **Receipt Information:**

1. If meals are over the maximums allowed, a business related justification accompanied by an itemized receipt is required
2. Times of departure and/or return are required if meals are being claimed on the day of departure and/or the day of return.
3. When purchasing a meal for another person, a receipt and an explanation are required.

### **Exceptions:**

1. When an employee is entitled to, and personally incurs the cost for two or more consecutive meals in a day s/he may exceed the allowed maximum on one or more of those meal claims as desired, as long as the total allowable maximums for the consecutive meals is not exceeded and the costs were actually incurred. Savings do not accrue and cannot be applied to expenses claimed on another day or to lodging expenses.

<b>Instate Meal Maximums (inclusive of tax and tip)</b>			
<b>Breakfast</b>	<b>Lunch</b>	<b>Dinner</b>	<b>Total</b>
\$8.00	\$9.00	\$17.00	\$34.00

<b>Out of State Meal Maximums (inclusive of tax and tip)</b>			
<b>Breakfast</b>	<b>Lunch</b>	<b>Dinner</b>	<b>Total</b>
\$10.00	\$10.00	\$20.00	\$40.00

\*NOTE: For long term travel: Where a consistent pattern of meal claims at the maximum is noted, the supervisor may require the employee to submit itemized receipts in the future to document the amount claimed.

## TRAVEL: RECEIPT INFORMATION

\*Receipts must have an amount paid, paid in full, etc. line, not just total charges to be reimbursed.

Travel Related Expense	Limits/Detailed Receipt Requirements
Airfare  **The business purpose of the trip must be clearly stated on the reimbursement form.	<b>Needed Information:</b> Traveler's Name, Destination, Departure and/or return dates, Amount of fare, Routing, Class of travel (UW will not reimburse premium/first/business class airfare) <b>Qualifying Receipts:</b> 1. The original "Passenger Receipt" plus any applicable original travel agency invoice/itinerary. <b>IF</b> original Passenger Receipt is not available: 2. A reasonable copy or computer printout (internet/email confirmation) containing above information AND proof of payment, such as a credit card statement or check will be acceptable.
ATM/Travelers Checks	Transaction/Purchase fees are reimbursable with justification.
Bus	Receipt required for one way trip in excess of \$25.00. Intercity travel requires receipt regardless of amount.
Gas for personal vehicle	Receipts required for all purchases and cost cannot exceed the mileage rate that would have been allowed.
Laundry	Laundry with receipt is reimbursable for stays exceeding three days, not more than once a week.
Lodging	With detailed receipt showing, daily room rate, guest name(s), dates of stay, single/double accommodations, and all other room charges.
Parking	Receipts required for parking claims in excess of \$25.00. Parking at headquarters (worksite) is not reimbursable.
Passports, Visas and Inoculations	Passports & Visas are reimbursable and require receipt if in excess of \$25.00. Inoculations not covered by insurance are reimbursable with explanation. Receipt required if over \$25.00
Phone calls, personal	One call, not exceeding \$5.00, per night of stay, while in travel status.
Porterage	\$1.00 per piece of luggage. Claims for higher amounts involving unusual situations should be explained.
Registration	Reimbursable with the following documentation: a copy of the brochure or registration form showing dates, location, title of conference, amount of fee and breakdown of items included in the cost. Receipts required in excess of \$25.00. Non-business related activities included in the fee, such as sightseeing tours, golf outings, etc. are not reimbursable. Prepaid registration must be filed for reimbursement using the Direct Payment/Employee Reimbursement Form.
Taxis	Receipt required for one way trip, including tip, in excess of \$25.00. Intercity travel requires receipt regardless of amount.
Tips to Hotel Employees	\$2.00 per day of arrival, \$2.00 per day of departure, \$2.00 per night of stay.
Water, Bottled	Reimbursable up to \$7.50 per day for foreign travel.
** Foreign Travel Receipts - Receipts received in foreign language should be translated at the time they are received and prior to submitting for reimbursement. How the transaction was paid for should also be listed on the receipt.	

## **NON-REIMBURSABLE EXPENSES**

Following is a list of expenses which are not reimbursable. Note: The list is not all inclusive.

- Alcoholic beverages
  - Greeting Cards
  - Lost/stolen cash/personal property
  - Spouse or family member's travel costs
  - Personal internet charges, personal fax charges
  - Expenses which do not show UW-business
  - Items that require a receipt and no receipt showing payment is provided
  - Personal items and services, e.g. toiletries, luggage, clothes, haircuts, etc.
  - Laundry, cleaning, pressing costs for trips of three days or less
  - Avoidable expenses for non-business related activities, such as sightseeing tours, etc.
  - Traffic citations, parking tickets and other fines
  - Extra fuel costs incurred to have vehicle rental vendors refuel vehicles.
  - Additional charges incurred for personal reasons involving vehicle rentals
  - Locksmith charges on either fleet, rental or personal vehicle, except when fleet or rental vehicles experience mechanical problems
  - Excess cost of circuitous or side trips for personal reasons
  - Parking costs at the assigned workplace
  - Repairs, towing service, lubrication, etc., for personal vehicles
  - Meals included in the cost of airfare, registration fees, lodging, etc.
  - Pay for view movies in hotel/motel room
  - Extra costs for additional person(s) in room
  - Additional charges for late checkout or un-cancelled guaranteed reservations (unless justified)
  - Lodging cost at unlicensed facilities unless there is a substantial cost benefit to the UW (must attach justification)
  - Lodging within 50 miles of the headquarters city (unless properly justified and approved)
  - Extra baggage charges for personal items, such as golf clubs, skis, etc.
  - Airline, car, hotel, corporate card club membership dues
  - Decorative Items – The purchase of decorative items (plants, paintings, flowers, etc.) from University-administered funds is allowable only if the items are placed in a general reception area frequented by students and/or the general public. Additionally, decorative items may be purchased for an event if the participant's fees cover payment for the items. The purchase of items placed in employee lounges, assigned offices or other work areas are not allowable.
  - Employee Consumables, Appliances, and Furnishings - The purchase of employee consumables (beverages, food, plates, cups, etc.) for recurring meetings with University funds are not payable/reimbursable. The purchase or payment of break room appliances & furnishings (microwaves, refrigerators, coffee makers, etc.) unless part of an approved building project are not payable through the University. These types of expenditures are considered personal in nature unless they are part of a prior approved business function or the items are placed in a common area for use by the general public.
  - Insurance - Insurance is not reimbursable, including flight insurance. All insurance must be processed through Risk Management. Trip insurance is not normally reimbursable. Exceptions may occasionally be granted for foreign travel when it is cost/risk justified and approved in advance by Terri Gill, UW Travel Manager.
  - Services - Payments to other individuals must be paid by other mechanisms because they may be tax reportable to the individual. Services should not be paid by our employees and claimed for reimbursement.
- Childcare costs
  - Kennel fees
  - Personal entertainment