Date: September 2, 2005

To: UW System Travelers

From: Doug Hendrix,  
UW System Associate Vice President, Financial Administration

Subject: New State Travel Policies Affecting UW System Travelers

The State of Wisconsin has entered into mandatory use contracts with travel agencies, car rental companies and in-state hotels. The state’s new policies surrounding the use of these contracts are summarized on the attached document. Additional information concerning the UW System’s implementation of these contracts is also provided. Among the key points to note:

1. Use of these contracts is mandatory in all cases where the travel is paid through UW accounts, even when the costs are being reimbursed in whole or in part by third party organizations or where a portion of the travel is self-funded by the traveler. Use of these contracts is required for employee travel, student travel and non-employee travel that is paid for through UW accounts.

2. Where air travel is involved, travelers will be required to make flight reservations through one of the four contract travel agencies:

   • Effective November 1, 2005, athletic team travel is to be arranged through Worldtek Travel. A teleconference is scheduled for September 12th from 9:00 to 10:30 to provide additional information to personnel responsible for this type of travel.

   • Effective November 1, 2005, student travel is to be arranged through STA Travel. We are scheduling a series of regional campus meetings that will include state Department of Administration and STA representatives to address the many issues and questions that those responsible for this type of travel have raised.

   • Effective January 1, 2006, other air travel must be booked either through Orbitz for Business, which is primarily intended to be used as
an online service, or through Adelman Travel Group, a traditional travel agency. Travelers will be required to set up a profile the first time either of these vendors is used. Further information regarding implementation details will be forthcoming from the campus business office. Meanwhile, travelers should continue making flight arrangements as they have in the past.

3. Effective immediately, travelers are required to stay at one of the approximately 325 in-state lodging properties with which the state has contracted “whenever accessible.” Likewise, a contracted hotel should be used whenever possible for meeting and conference needs if a state/UW-owned/leased/operated facility is not available.

4. Enterprise continues to be the state’s contract vendor for in-state car rentals and National continues to be the state contract vendor for out-of-state rentals. The attached document lists a number of new and newly re-emphasized state polices regarding car rentals.

5. Effective October 17, 2005, use of an institutional liability purchasing card for all reimbursable airline tickets, travel agency service fees, hotel room rates and car rental costs will be required. If they so choose, employees have the option of utilizing the state-provided personal liability travel card instead of or in addition to the purchasing card for travel-related expenses incurred while in official travel status. Campus business offices will establish and communicate the procedures that each campus will use to comply with this new state policy. Due to the administrative workload associated with using procurement cards for lodging, some UW institutions may strongly encourage travelers to obtain and use the state-provided personal liability travel card.

By September 16th, these new state policies will be incorporated into the UW System’s Travel Regulations, found at http://www.uwsa.edu/fadmin/fppp/fppp36.htm, and in the Travelers’ Reference Guide, found at http://www.uwsa.edu/fadmin/travpub.htm.

Please contact your campus business office with any questions regarding the new travel policies.
State of Wisconsin Enterprise Travel Program

During 2005-2006, the State of Wisconsin is implementing a new “enterprise travel program” that will affect UW System travelers in significant new ways. Components of the enterprise travel program at this time consist of contracted travel agencies, car rental companies, in-state lodging and the state’s charge cards. In the near future the state Department of Administration intends to add airline and out-of-state lodging contracts to the program.

**Applicability**

Enterprise Travel Program contracts must be used where the travel is paid through UW accounts, even when the costs are being reimbursed in whole or in part by third party organizations or where a portion of the travel is self-funded by the traveler. Use of these contracts is required for employee travel, student travel and non-employee travel that is paid for through UW accounts regardless of funding source.

**Travel agencies**

*New state policies affecting UW travelers:*

1. For all trips involving air travel use of one of the four contract vendors is required. Effective November 1, 2005, WorldTek Travel is to be used for athletic team travel and STA Travel for student travel. Effective January 1, 2006, other air travel must be booked either through Orbitz for Business, which is primarily intended to be used as an online service, or through Adelman Travel Group, a traditional travel agency.

Note: As of September 2, 2005, DOA has not yet awarded a contract for non-student group travel as was anticipated when the state did its RPF for travel agency services. Until further notice, personnel responsible for arranging non-employee and non-student group travel (e.g., educational travel targeted to alumni) should continue making these type travel...
arrangements as at present, while giving first consideration to the state’s four contract travel agencies.

2. Prior to each trip the traveler and/or travel arranger will choose which travel agency (Adelman or Orbitz) to contact for that trip. A traveler profile must be completed with the travel agency prior to making reservations for the first time.

Note: As of September 2, 2005, procedures for establishing traveler profiles have not been finalized. Until further notice, travelers should continue making airline reservations as at present.

3. The state’s contracted fees with travel agencies and any other contract discounts negotiated by the state will only be used by the state/UW employee for official state/UW-related travel. When a family member or friend is traveling with the employee, the travel agencies will charge the state-contracted service fee for the employee’s travel and the general public service fee for the non-employee. Employees utilizing the contracted travel agencies for purely personal travel will not receive the state’s contracted service fee.

4. When there is an accompanying traveler whose expenses are not reimbursable, Adelman should be used or Orbitz should be called ($15 fee) since there is no way to specify alternate payment arrangements when using Orbitz for Business online.

**In-state lodging**

*New state policies affecting UW travelers:*

1. The state has contracted room rates with approximately 325 hotels in Wisconsin. The listing of these hotels may be found at [http://www.uwsa.edu/fadmin/fppp/fppp36e.htm](http://www.uwsa.edu/fadmin/fppp/fppp36e.htm). Effectively immediately, state/UW employees traveling on official business will stay in contracted hotels whenever accessible and follow the policy in the UW System Travel Regulations which follow the state policy for travel reimbursement. The state lodging allowance may never be exceeded excepted as provided in the UW System Travel Regulations.

2. Personal use of contracted hotel rates is not allowed. Employees must be in official travel status when using a contracted rate or requesting a non-contracted hotel to honor the state’s contracted rate.
3. Appropriate UW identification must be displayed by employees upon check-in to secure the state rate and avoid paying the state tax.

4. Non-employees conducting official business for the state/UW, where state/UW funds or accounts are used to pay for the hotel may use contracted rates.

5. A state/UW-owned/leased/operated facility should be used whenever possible for meeting and conference needs. When suitable state/UW facilities are not available, a contracted hotel should be used whenever possible.

**Rental cars**

*New and newly re-emphasized state policies affecting in-state rentals:*

1. Travelers should always check for the availability of a state vehicle first.
2. Use of the state’s contract with Enterprise is required for in-state rentals.
3. The state’s Fleet Driver and Management Policies and Procedures (http://www.doa.state.wi.us/docs_view2.asp?docid=3962) apply to all vehicles driven for official state/UW business including rental cars.
4. The size of the vehicle rental is determined by the number of travelers and amount of equipment to be carried. If one or two travelers are using the vehicle, an economy sized vehicle shall be rented. A larger size vehicle may be rented and fully reimbursed if there are three or more travelers involved in state/UW business or extra equipment. Claims for larger vehicles must be justified in writing.
5. Traveler/arranger should call Enterprise directly or use the Enterprise web site.
6. Always decline insurance since it is included in the state negotiated contract.
7. Fill up tank with gas just before returning rental car.
8. Employees may be required to show UW ID at time of rental pick-up to secure rate. Non-employees traveling must present a letter on institutional letterhead to secure the contract rate.
9. No personal use of the state’s contract rate is allowed.
10. Rentals over 29 days are not allowed.

New and newly re-emphasized state policies affecting out-of-state rentals:

1. Use of the state’s contract with National is required.
2. The state’s Fleet Driver and Management Policies and Procedures (http://www.doa.state.wi.us/docs_view2.asp?docid=3962) apply to all vehicles driven for official state/UW business including rental cars.
3. Traveler / arranger should contact the contact travel agency to reserve in when an airline ticket is involved. When no airline ticket is involved the vehicle should be reserved directly with National either online or by calling.
4. The size of the vehicle rental is determined by the number of travelers and amount of equipment to be carried. If one or two travelers are using the vehicle, an economy sized vehicle shall be rented. A larger size vehicle may be rented and fully reimbursed if there are three or more travelers involved in state/UW business or extra equipment. Claims for larger vehicles must be justified in writing.
5. Decline collision and theft insurance for all domestic rentals since it is included in the state negotiated contract. However, that insurance should be accepted for all foreign rentals in those countries where National does not provide coverage in the contract.
6. Fill up tank with gas just before returning rental car.
7. Employees may be required to show UW ID at time of rental pick-up to secure the contract rate. Non-employees traveling must present a letter on institutional letterhead to secure the contract rate.
8. No personal use of the state’s contract rate is allowed.

State charge cards:

New state policies affecting UW travelers:

1. Effective October 17, 2005, employee use of an institutional liability purchasing card for all reimbursable airline tickets, travel agency service
fees, hotel room rates and car rental costs will be required. If they so choose, employees have the option of utilizing the state-provided personal liability travel card instead of or in addition to the purchasing card for travel-related expenses incurred while in official travel status.

2. When using a purchasing card is used for lodging, only the room rate and any applicable taxes may be charged. Other charges for room service, telephone calls, movies, etc. may not be charged to the purchasing card.

3. No personal charges may be made to the institutional liability purchasing card.

4. The state-provided personal liability travel card may be used for non-reimbursable expenses that are reasonably incidental to business related travel expenses where it is not practical for a merchant to separate the non-reimbursable charges onto a different bill (e.g., a meal that exceeds the maximum allowed where only part of the cost will be reimbursed).