

IMPORTANT TRAVEL REMINDERS **YOU ARE RESPONSIBLE FOR FOLLOWING ALL UW TRAVEL** **POLICIES**

All rules and regulations must be followed in order to be reimbursed for your travel or purchases.

1. Review pre-trip procedures, especially if there is foreign travel
<http://www.bussvc.wisc.edu/acct/travel/tabtriplanning.html>
2. Air travel **MUST** be booked through Concur or Fox World Travel. Any other means of booking will not be reimbursable. Concur can be accessed through UW Travel Wise
<https://uw.foxworldtravel.com> Fox World travel contact info is: 1-866-230-8787. Exceptions **ARE NOT** made to this rule.
3. Lodging **MUST** be booked either through Concur/Fox World or directly through the hotel. Lodging booked through third party booking (Expedia, Air B&B) will not be reimbursed.
4. Employees who drive for UW business must first be an authorized driver in the driver authorization database. Please see Amy Bell in the ISyE department office (ME 3270) for information and forms. New driver authorization forms should be turned in to Amy. If driving personal vehicle for UW business, please follow these instructions.
<http://www.bussvc.wisc.edu/acct/policy/travel/privateveh.html>
5. Vehicle rental **MUST** be booked through Big Ten Contract accessed through UW Travel Wise portal
 - a. **Do not use the pre-fueling or refueling option** when signing the contract at the time of pickup; Gas receipt has to be included in your expense packet to show that you had refueled vehicle yourself
 - b. *When booking through Concur it does give an option to include in-car GPS system or ski rack. Please note these items are not reimbursable if you choose these options.*
 - c. For domestic car rentals, do not purchase extra insurance beyond what is automatically provided. Extra insurance is not reimbursable.
6. **Expense reports MUST be submitted 90 days from the last day of business travel or from the purchase date of supplies. Expense report cannot be reimbursed if submitted past 90 days. You will get an alert when entering the expense report if it is past 90 days.**
7. The system will default to set amounts for daily meal per diem. Any provided meal at a conference must be marked provided and deducted from your total meal per diem. If you want to claim a lower amount, indicate to Amy Bell the amount you want to reduce the meal per diem to. The system will not allow you to change the default amounts.
8. To create an expense report, follow this link: <http://www.bussvc.wisc.edu/acct/e-Re/index.html>. **You are responsible for attaching electronically to your report or turning in to Amy Bell in the ISyE department office the following:**
 - a) All receipts should be itemized and show payment. See the chart below for required receipts.
 - b) If attending a conference you must include the following
 - a. Conference agenda/program
 - b. Recommended hotel list
 - c. Registration information detailing what is included in the registration fee
 - d. General conference information showing name, location and dates
 - c) Additionally, Mechanical Engineering requires an approval form (<https://www.engr.wisc.edu/app/uploads/2016/02/E-Reimbursement-4.pdf>) with funding signed by the PI whose funding you are using (if traveler is not PI).

Receipt ALWAYS Required	Receipt Required When Claimed Expenses Exceed \$25	Receipts Not Required for Expenses Included in the Meals & Incidental Expenses (M&IE) Per Diem Allowance
<ul style="list-style-type: none"> • Airfare • Books and miscellaneous supplies/purchases • Currency processing/foreign transaction fees • Fleet vehicle rentals • Gasoline for rental vehicles • Hosted meals/events • Internet connectivity for business use while in travel status • Lodging • Registration fees • Train fare • Travel visa fees and inoculations • Vehicle rentals 	<ul style="list-style-type: none"> • Baggage and seat fees • Bus fare • Limos • Parking • Shuttles • Subway fare • Taxis • Tolls 	<ul style="list-style-type: none"> • Bottled water • Fees and tips given to restaurant staff, porters, baggage handlers, hotel housekeeping or other service staff, valets, train or ship service staff, etc. • Laundry, dry cleaning and pressing of clothing • Mailing and other expenses associated with filing expense reports • Personal meals • Phone calls (business and personal) • Transportation between places of lodging or business to obtain meals