Math Department’s Travel Reimbursement Process

UW Travel Policies & Procedures can be found on the UWTravelWIse site: https://uw.foxworldtravel.com/

Assign Alternates
This can be found by going to https://uw.foxworldtravel.com/
Under REIMBURSEMENT click on E-Reimbursement Log In. Choose UW-Milwaukee and enter your ePanther credentials.
Click “Assign an Alternate“ and add:
00807911 Katie (Kathleen) Wehrheim - travel reimbursements
00353735 Jane Miles - event, supply, other reimbursements

Before your trip:
1) Complete the TAR (Travel Approval Request)


Complete and sign the form. Submit the form to Katie Wehrheim for review and approval. We will not accept online TARs. Only the Math L&S TAR will be accepted.

- If you will be taking personal travel time before or after a UWM funded trip you will need to establish that your personal travel will not incur extra expenses for UWM.
  - Use the Concur Travel site to print the cost of a flight that departs the day before and returns the day after the conference/event you attend. UWM will only reimburse your airfare up to this amount.

2) Airfare must be booked with Fox World Travel agents or on their online booking tool, Concur Travel.
Airfare Purchase & Payment Procedures: https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/purchase-payment-of-business-air-travel/
Fox World Travel Agents: https://uw.foxworldtravel.com/reservation-options/
Concur Travel online booking tool:

- If you are faculty or staff, you must have a Concur profile to book online.
To create a Concur Travel profile: https://www.concursolutions.com/registration/register_form.asp?regcode=C01W73FWTCT

- Graduate students should contact Katie Wehrheim to book airfare.
- Department Guests should work with Jane Miles to book airfare.
- Under no circumstance will airfare be reimbursed if it is not booked through Fox World Travel/Concur Travel.

3) Lodging must be booked directly with the hotel, conference site or on the Concur Travel site.
- Booking through third party agents (i.e. BookIt, Expedia, Travelocity, etc.) cannot be reimbursed.
- If you have any concerns, please check with Katie Wehrheim before making a reservation.
4) **Driving** (personal vehicle or rental), you must be a UWM Authorization Driver, and you must book with Enterprise, National, or Hertz. Failure to do so may result in the **denial** of your reimbursement request. To see if you are an approved driver, check the list on the Risk Management site:
- If your name doesn’t appear on the list, fill out the driver’s authorization form before you travel: [https://pantherfile.uwm.edu/groups/sa/usa/public/Risk/d.pdf](https://pantherfile.uwm.edu/groups/sa/usa/public/Risk/d.pdf)
- Be sure to note that you are a UWM authorized driver on your TER and include a screenshot of your name on the aforementioned list as proof.

5) **Review** the UWM Travel Policies & Procedures before traveling: [https://uw.foxworldtravel.com/](https://uw.foxworldtravel.com/)

**Pro tip:** Prepay as many expenses as possible with your or the department’s P-Card to avoid potential liabilities and having to front the cost of your trip. Please note that UWM policy generally does not allow us to prepay lodging beyond a one-night deposit.

**Pro tip:** There are no exceptions to UWM’s booking policies. If you book off policy, you will pay out of pocket for the expenses incurred. If you have questions, please ask Katie Wehrheim for clarification.

**During your trip:**
1) Make sure to keep and bring back a daily agenda/program/schedule for the event(s) you attended. This agenda should cover the entire conference, not just the day(s) you presented.
2) You must submit a detailed hotel receipt showing an end balance of $0.00.
3) Meal receipts are no longer required, most other receipts are needed to justify reimbursement.
4) Be aware that if you exceed the Lodging/Meal & Incidental maximums you will have to eat the extra cost. The only exception to this is if the lodging is listed as a conference hotel.

**Pro tip:** When in doubt keep the receipt. It is best if we have a full understanding of your trip and it will help us determine what is needed on your reimbursement form.

**Pro tip:** When traveling in the state of Wisconsin you should not be paying sales tax. See Jane Miles for a tax exemption card. UWM will not reimburse you for Wisconsin sales tax.

**When you return:**
**Important:** The entire reimbursement process must be completed within 90 days of the end of travel. It is recommended that you complete a TER within 30 days of the end of your trip so that the department, L&S and UWM travel have sufficient time to review your TER.

1. Gather your relevant receipts, itinerary, programs, and other documents relating to your trip. Write down which expenses you would like to be reimbursed. Please also note what expenses were paid for by your or the department’s P-Card.
2. Scan all receipts, itineraries, programs, and other documents relating to your trip. You will need to provide travel itineraries and lodging information even if you are not calming those expenses.
4. Your Expense Report name should be: **Last Name_Funding/PRJ_Location**
5. Upload your approved TAR form and check your Accounting Details
6. Enter your travel expenses into the Online TER. You can pull in your electronic TAR as a starting point to save time. The TER will auto complete M&IE totals but this will not take into account provided meals and first/last day of travel. You will need to personally alter those numbers when you fill out the TER.

7. You as the traveler, Katie, or Jane can submit your Expense Report for review and approval. Your report is then approved by Katie and Kyle.

8. Expect the reimbursement process to take 4-6 weeks.

**Pro Tip:** You can never provide too much documentation.

**Important:** If at any point a Travel Approver at the department, college, or campus level finds an issue with your TER they will send it back to you for revisions.

**Assistance with Flights, Registrations, Policy Clarifications, Faculty and Staff Travel:**
Katie Wehrheim (00807911); Email: wehrheik@uwm.edu; Hours: 8:30-1:00pm; Office E404; Phone: x4837

**Assistance with Policy Clarifications Faculty and Student Travel:**
Katie Wehrheim (00807911); Email: wehrheik@uwm.edu; Hours: 8:30-1:00pm; Office E404; Phone: x4837

**Assistance with Guest Policy Clarifications, Purchasing, and Travel:**
Jane Miles (00353735); Email: jmiles@uwm.edu; Hours: 8:00-4:00pm; Office E403; Phone: x4836

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