UW Law School
Business Office Contacts

Adam Bushcott
Main Office Manager and Parking Coordinator
608-262-2240........... adam.bushcott@wisc.edu

Justin Boehm
Human Resources Manager
608-890-4466.......... justin.boehm@wisc.edu

CJ Ullrich
Building Manager
608-265-4655......... cj.ullrich@wisc.edu

Kelly Hallmark
Payroll & Benefits Specialist and HR Assistant—Students
608-262-3138......... kelly.hallmark@wisc.edu

Jennifer Hanrahan
Faculty Secretary/Assistant
608-890-0202........... jennifer.hanrahan@wisc.edu

Jennifer Gardner
Accountant
608-262-6297......... jennifer.gardner@wisc.edu

Stacy Humblet
Student Intern
accounting@law.wisc.edu

Bethany Pluymers
Associate Dean for Administration
608-265-7981.......... bethany.pluymers@wisc.edu
Welcome
to the Law School Business Office’s
Faculty & Staff
Financial Reference Guide!

In an effort to streamline, we have collected the financial information we believe best answers the most common questions we receive. This handy Reference Guide is yours to bring with you on your travels or to keep in your office—wherever you most need it!

Please note that while we attempted to hit the highlights, this Reference Guide does not contain all of the University’s detailed policies, which can be found on the Business Services website.

As always, the Business Office is available to answer any and all of your questions; in fact, questions are encouraged! The potential consequences to the DIY-method may mean incomplete reimbursement...
Reimbursements

GENERAL

- **90-day deadline**
  - “Travel related expenses must be submitted and substantiated within 90 days from the end of the business trip.”
  - “Non-travel related expenses must be submitted and substantiated within 90 days of the date the expense was incurred.”

- After 90 days, you may be reimbursed, but the reimbursement will be **taxable**
- Please submit earlier in case of Business Office questions, issues, etc.

- **Attach digital documentation**
  - Whether using GET or e-Reimbursement, please attach a digital copy of your documentation (receipts, schedules, etc.)

  - Digital copies = faster and more convenient for Business Office

  - If you need help doing so, please ask! We’re happy to show you

- **Cover sheet**
  - Please print off a cover sheet and turn in to Kelly Hallmark
    - this helps facilitate the “flow” between approvers and auditors
  - Examples in Appendix

- **DIY or using an alternate?**
  - It’s up to you:
    - prepare your reimbursement yourself...
    - have an alternate prepare it on your behalf...

  - But please keep in mind, the following will delay or prevent reimbursement:
    - missing documentation
    - vague descriptions
    - technical system errors

  - Either way, **we’re here to help!** Questions welcomed and encouraged!
General Travel

- If nothing else, remember...
  - When in doubt, ask
  - 90-day deadline
  - Concur is your friend!
  - Documentation is always helpful

- For detailed policies, please see the Accounting Services website.

GENERAL

- **Required documentation**
  - Out-of-State Travel Approval Form
    - when using 101 funds and traveling anywhere besides WI, Chicago, or Twin Cities
    - completed at pre-trip planning stage
  - Indirect routing, extra personal days, etc.
    - explanation and cost comparison at the time of booking
    - Fox/Concur is happy to provide...just ask!
  - Registration/conference fees (schedule, program, brochure, etc.)
  - Conference-recommended hotel (if the price exceeds lodging maximum)

- **Receipts**
  - What counts as a receipt?
    - date of purchase
    - amount paid
    - itemized list of purchases
    - form of tender (cash, last 4 digits of credit card, etc.)
  - **Credit card statement ≠ receipt**
  - Can be digital and/or emailed!

  - Required for:
    - airfare
    - car rental & gas
    - books, supplies, internet fees
    - lodging (use the folio/receipt given at check-out)
    - if more than $25.00: taxis, baggage, parking
• **Savings**
  o You never HAVE to be reimbursed for something
    - if you want to save that money for future travel, we can help you, so talk to us!
    - ex.: marking more meals as provided

• **My Corporate Card**
  o If you travel a lot, this may be a good option
  o US Bank personal liability for travel and business-related expenses while in travel status

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**MEALS**

• **Receipts**
  o No receipts required for regular meals when traveling
  o They ARE required for any hosted meals
    ▪ i.e. business event, taking out a new faculty member, etc.

• **Day trips**
  o Day trips (no overnight lodging) = $15/day

• **Overnight**
  o Varies by location
    ▪ use [UWTravelWise Calculator](#) before travel
  o First and last days of travel
    ▪ 75% of total based on location

• **Provided meals**
  o Note any meals provided by host/conference
    ▪ these will be deducted from your total
  o Meals reimbursement includes $5/day for incidentals
    ▪ even if all meals are provided, you can still get this $5/day
    ▪ ex: water, tips, laundry, mailing, etc.

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AIRFARE

- Generally:
  - Fox/Concur must be used
    - only exception: traveling within a foreign country
    - but: the flight to and from the U.S. must be through Concur
  - Provide your Fox/Concur receipt/itinerary
    - no boarding passes, check-in print-offs, etc.
  - Reimbursable as soon as you purchase
    - no need to wait until conclusion of trip

- Fox/Concur
  - Fox = travel agents; Concur = online booking tool
  - Must be used to book flights
  - In the event of airline delays, flight cancellations, or other disruptions:
    - contact Fox directly (they can work across all airlines)!
    - for 24/7 support, call: 866-230-8787

- Indirect routing/personal leg
  - Allowable:
    - as long as no additional costs occur (within ~$40)
    - OR
    - if there are substantial savings (including extra hotel rooms, parking, meals, etc.)
  - However:
    - “explanation and cost comparison obtained at the time of booking are required.”
    - Fox/Concur can provide this documentation, but you have to ask for it

- Seat assignment fees
  - “Additional fees associated with booking coach/economy aisle, window or exit row... are allowable.”
  - No fare class upgrades (i.e. first class, business class, etc.) of any kind are allowed

- Baggage
  - First bag within the airline’s limits—no questions asked
  - If more than one bag, or if bag is oversized—a business justification is required

- Economy vs. “basic” economy
  - The major airlines have introduced “budget” or “basic” economy fares in order to compete with “budget” airlines
While these “basic” economy fares are often cheaper...

- they are highly restricted and less flexible
- will not allow for any changes in your schedule
- if your plans change, you will need to purchase a whole new ticket

You are **not** required to select the “basic” economy fares!
(even if they’re the cheapest option!)

<table>
<thead>
<tr>
<th></th>
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<th>basic economy</th>
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</tr>
<tr>
<td>United</td>
<td>&quot;economy&quot;</td>
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</tr>
<tr>
<td>American</td>
<td>&quot;economy&quot;</td>
<td>&quot;basic economy&quot;</td>
</tr>
</tbody>
</table>

- If any other flight fees, issues, or questions ("preferred seat"/extra-legroom charges, change fees, cancellations, etc.) come up, please ask us...*the sooner, the better!*

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LODGING

- **Booking**
  - To book, contact the hotel directly or use Fox/Concur
    - If you do use Fox/Concur to book, please note that this can only be reimbursed upon completion of the trip (unlike airfare)
  - The UW is encouraging us to use Fox/Concur, so please check there first!
    - “Travelers and travel arrangers are expected to research rates and reserve lodging using Concur or Fox World Travel to take advantage of potential cost savings.”
    - “…rates found in Concur/Fox World Travel may be less than conference rates.”
    - “UW contract rates, which provide opportunities for lodging savings, are only offered within” Fox/Concur
    - The more we use Fox/Concur now, the greater potential for future savings
o DO NOT use Expedia, Priceline, AirBnBs, etc.
   —*This is a University-wide rule; we cannot reimburse*

o If you have any further questions (un-cancellable, extra fees, etc.), please see the Business Office before booking

- **Maximums**
  o Maximums vary by location
  o Use [UWTravelWise Calculator](#) before travel for estimates
  o If a conference supplies or recommends a hotel that exceeds this maximum, you can still be reimbursed for the whole amount!
    - please provide documentation showing the conference’s recommendation (brochure, registration form, etc.)

- **Tax exemptions**
  o Tax exemption for lodging in Wisconsin, as well as:

    - Minnesota  - Mississippi  - Missouri  - New Mexico  - N. Carolina  - N. Dakota
    - Ohio  - Rhode Island  - Tennessee  - Utah  - Vermont  - Virginia  - W. Virginia

  o Please see Business Office for tax-exempt documentation to provide to hotel

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**REGISTRATION/CONFERENCE FEES**

- Can be prepaid by the Business Office!
  - contact Jennifer Hanrahan or Adam Bushcott
- If you pay then request reimbursement—
  - please provide the required documentation (schedule, program, brochure, etc.)

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INTERNATIONAL TRAVEL

- **Check-list**
  1. **Out-of-State Travel Approval Form**
     - when using 101 funds and traveling internationally
     - completed at pre-trip planning stage
  
  2. Travel insurance by **Cultural Insurance Services International** (CISI)
     - international health and travel insurance when traveling abroad on business
     - includes diagnosis, treatment, hospital stays, prescription drugs, ambulance, replacement eyeglasses or contacts, trip delay/interruption, and more!
     - **required**, but the Law School will pay for it!
     - you may also purchase coverage for dependents traveling with you (but the Law School can’t pay for this)
     - contact Jennifer Hanrahan **at least 4 weeks** before travel to make the arrangements

- **Foreign currency**
  - Any purchase made using foreign currency **must be converted** to US dollars for reimbursement
    - if the Business Office is preparing your reimbursement...
      we will do the conversion
    - if you are personally preparing the reimbursement...
      - please provide the exchange rate documentation
      - use the date of the purchase (not today’s date)

- **EUROP ASSISTANCE** (previously MEDEX)
  - optional program provided at no cost while traveling
  - **NOT** the required health insurance
  - supplemental/optional, provides coverage for medical evacuation and repatriation only

_______________________________________
Vehicle Guidelines

TAXIS

- Receipts required if more than $25.00
- Ubers & Lyft = taxis, are allowed!

DRIVER AUTHORIZATION

- Risk Management
  - Must first be authorized by Risk Management to drive on UW business
    - this includes personal vehicles, rented cars, or fleet vehicles
  - To confirm your status, please visit the online database:
  - Driver authorizations take 10 business days
    - plan ahead!
  - But once you’re authorized, you won’t need to renew!
    - this does not apply to students
    - any negative change in your driving record may result in revocation of authorization

- WI license
  - Use the this portal if you have held a WI license for either:
    - the past three years
    - two years without being licensed anywhere else

- All other instances
  - If you have an out-of-state license, or have previously had an out-of-state license and have had a WI license for less than 3 years, you must complete:
    - a Vehicle Use Agreement
    - and Notarized Statement of Driving Record

_______________________________________
PERSONAL VEHICLES

- **vs. fleet vehicles**
  - If driving less than 300 miles roundtrip, fleet vehicle is encouraged
    - if more than 300 miles and personal vehicle is used, reimbursement will be limited to lower “turndown” mileage rate
  - If fleet vehicle is not available, provide documentation in order to get standard rate mileage
  - Standard car rate = $0.535
  - Turndown car rate = $0.352

- **FYI**
  - Madison —> Milwaukee = ~160 miles roundtrip
  - Madison —> O’Hare = ~270 miles roundtrip
  - Madison —> Minneapolis = ~540 miles roundtrip

- **Documentation**
  - Provide Google Maps or MapQuest documentation to show route taken and approximate mileage
    - this is especially important if there are additional stops, an abnormal route, etc.

FLEET VEHICLES

- **FYI**
  - If you need to cancel, do so within 24 hours of reservation, or you will still be charged
  - If there is no fleet vehicle available, you may put your name on a waitlist
    - but you need to keep checking status, as you are not informed if a car becomes available
  - There is parking at fleet vehicle lot for your personal vehicle
    - but it is limited—first come, first served basis
    - you can be reimbursed for a taxi ride to fleet vehicle lot or for an alternative parking location! (receipts required if more than $25.00)
CAR RENTAL

- Booking
  - University contracted
    - must use Enterprise or National
    - **only exception:** no Enterprise or National in the area
      (provide Fox/Concur documentation showing this)
  - Book via [Fox/Concur](#) or directly through Enterprise or National
    - If you do use Fox/Concur to book, please note that this can only be reimbursed upon completion of the trip (unlike airfare)
    - If you do book directly through Enterprise or National, the [Big 10 contract codes](#) must be provided
    - And yes, you may use Big 10 contract codes for personal use!
  - Do not take the insurance; **it cannot be reimbursed**

- Documentation and receipts
  - Must provide the original vehicle rental agreement
  - Receipt required for gas reimbursement
    - Do NOT opt for the gas pre-pay option
      - though this may sometimes look cheaper, we need a gas receipt
    - Do NOT return it with an empty tank to let the rental company fill it up
      - “If the traveler fails to return the vehicle with a full tank of fuel, the cost of the vendor refueling the vehicle will not be paid or reimbursed by the University.”
Purchasing Guidelines

GENERAL

- If nothing else, remember...
  - Business Office = “one-stop shopping”
  - We prefer that you buy through the Business Office
    - if you do buy, **90-day deadline** for reimbursement
  - Provide a business purpose
  - Ship to the Law School’s address
  - $5,000 limit

- **$5,000 limit**
  - If a total transaction is over $5,000
    - we need to involve UW’s Purchasing Dept.
    - please see the Business Office prior to purchase

- Special approval
  - Required when purchasing:
    * alcohol
    * furniture
    * insurance coverage
    * printing more than $49.99 (including while traveling)
    * any purchase requiring a signed contract

- Contracts
  - Please contact the Business Office
    - you cannot sign your own contracts, **no matter the amount**
    - a UW Purchasing Dept. official must sign
    - if you sign a contract, you (not the UW) are personally liable for it

  - Only the following “Five Golden Offices” may sign a contract:
    * Office of the Chancellor
    * Office of the Provost
    * Office of Industrial Partnerships
    * Vice Chancellor for Finance & Administration
    * Purchasing
SUPPLIES & TECH

- Office supplies
  - Please check the 5th floor supplies closet
    - we may already have what you’re looking for!
    - if not, please see the Business Office for specific requests
  - If traveling, you may purchase and request reimbursement
    - provided you supply necessary business purpose for purchase

- Tech & Computers
  - FISC have limits to certain tech
    - “Both [laptops and tablets] may be purchased, but not in the same fiscal year. Each may be replaced on a three-year cycle.”
  - Please see the Business Office to purchase
    - If we purchase directly through DoIT, we save on taxes and credit card fees
  - Bring any new computer to IT for security set-up and formatting help

BOOKS

- All personally-purchased items must be shipped to the Law School’s address:
  - UW Law School
  - 975 Bascom Mall
  - Madison, WI 53706

- Amazon
  - Please see the Business Office to request
    - we have Amazon Prime, which includes:
      - free 2-day shipping and tax-free
  - If you purchase Amazon items on your own, you shouldn’t be reimbursed for the tax

- Specialty supplier
  - Specific libraries, vendors, etc.
  - Please see the Business Office to request
    - can be purchased directly using Law School purchasing cards or...
  - Personally purchase and request reimbursement
RESEARCH & SCHOLARSHIP

- **Research (library resources)**
  - Access to many databases, archives, and research guides (LexisNexis & Westlaw)
  - Please see library staff for help and access

- **Scholarship submissions**
  - Submit your manuscript to many law reviews and journals all at once
  - The Law School maintains institutional accounts for ease of submission
  - Please see Business Office to get set up

- **ExpressO**
  - Each journal submission costs $2.95
  - If your submission totals less than $100:
    - you won’t be prompted to enter a credit card number
    - the Law School is billed directly for submissions less than $100
    - the money would come out of your funding sources (FISC, professorship funds, seed grants, etc.)
  - If your submission totals more than $100:
    - you will be prompted to enter a credit card info
      (you could break these submissions up to avoid putting in credit card info)
    - if you do put in a credit card, you may submit for reimbursement
    - the money would come out of your funding sources (FISC, professorship funds, seed grants, etc.)

- **Scholastica**
  - Each journal submission costs $6.50
  - As an authorized user, you won’t be prompted to enter a credit card number
    - the Law School is billed directly
  - If you are prompted to enter a credit card, you aren’t in the system correctly
    - please see Jennifer Hanrahan to correct this
  - The amount charged will come out of your funding sources (FISC, professorship funds, seed grants, etc.)

- **Note!**
  - Some journals only use ExpressO; some journals only use Scholastica
  - Some journals **use both** ExpressO and Scholastica
    - **be sure not to “double-up” and submit to the same journal twice!**
Catering & Meals

**UW-APPROVED CATERERS**
- Please see Business Office to plan
- Generally, on-campus events need to be catered by:
  - Wisconsin Union
  - University Housing
- If neither is available, we may use outside catering with:
  - documentation showing campus catering was not available
  - outside caterer’s insurance

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**MEAL AT YOUR HOUSE**
- Must be catered, not homemade
  - see University-approved caterers note above

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**HOSTED MEALS**
- **Definition**
  - “University funds may be used to provide meals, break items or non-alcoholic beverages at University sponsored events or business functions that are not purely social in nature.”
  - Hosted meal ≠ travel per diem meal
- **Examples:**
  - conferences, seminars, retreats, workshops, training, colloquiums, receptions, business meetings, interviews, recruiting, etc.
  - Law School faculty may use this to provide a lunch or treats for their classes
    - $100 per semester per class
- **Alcohol**
  - University will NOT pay for expenses related to alcohol
• Documentation
  o About the event (date, time, business purpose)
  o Itemized receipt
  o List of attendees (include name and affiliation)

• Maximum rates

<table>
<thead>
<tr>
<th>Expense</th>
<th>Within the State of Wisconsin</th>
<th>Outside the State of Wisconsin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakfast</td>
<td>$12</td>
<td>$15</td>
</tr>
<tr>
<td>Lunch</td>
<td>$18</td>
<td>$23</td>
</tr>
<tr>
<td>Dinner</td>
<td>$30</td>
<td>$37</td>
</tr>
<tr>
<td>Refreshment Break</td>
<td>$10</td>
<td>$10</td>
</tr>
</tbody>
</table>

• Recommended venues
  o University Club
    ▪ the Law School has a membership
    ▪ no need for individual memberships
    ▪ only for hosted meals, not personal
    ▪ please bring itemized receipt to Accounting
  o Please see Dianna Klein for other recommended options

• Spouses & partners
  o While spouses/partners are welcome to attend speaker and candidate dinners...
    - their portion cannot be reimbursed
    - unless the spouse is a part of the business being conducted
Student Hiring

STUDENT EMPLOYEE DEFINITIONS

- PAs
  - Perform high-level research; require special knowledge/skill
  - Duties can only be performed by law or graduate students

- PA percentage appointment
  - When you hire a PA at 33.3% time or more, they will receive a $6,000/semester tuition remission (which you will be charged for)

- PA hourly
  - Limited to max. of 13 hours/week (which includes any concurrent PA positions)
  - Pay rate is $19.04/hour

- Student hourly
  - Pay range is $9/hour or greater (you set the rate, but the Business Office can advise!)
  - Limited to a max. of 20 hours/week
  - Can be law or graduate students, but not required
  - You must go into HRS and approve student’s hours every two weeks

DOCUMENTATION

- Before hiring
  - Authorization to Hire a Student form (green sheet)
  - Copy of your Grad School award letter (if applicable)
  - Payroll/HR need these at least one week before the student begins work

- Before student can begin to work
  - (for PAs only) completed and clear Criminal Background Check
  - W-4, self-identification, and direct deposit forms from student
  - I-9 documentation needs to be completed
    - within the first 3 days of hiring, or
    - employment will be terminated

- Kelly Hallmark = Student HR Assistant
Appendix

REIMBURSEMENT COVER SHEET EXAMPLES

- e-Reimbursement
  - Click “Printable View” at the bottom (towards the right)
  - print and put in Kelly Hallmark’s mailbox

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**Expense Report**

**JENNIFER HANRAHAN**  
Employee ID: 00437746

**Report Date:** 09/11/2017 10:32:57AM  
**Status:** Pending

**Description:** Example  
**Business Purpose:** Business

**Comment:** Example

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<th>Merchant</th>
<th>Location</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>08/24/2017</td>
<td>Meals-Hosted</td>
<td></td>
<td>MADISON, WI</td>
<td>25.00 USD</td>
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</tbody>
</table>

**Expense Report Totals**

- **Employee Expenses:** 25.00 USD
- **Non-Reimbursable Expenses:** 0.00 USD
- **Prepaid Expenses:** 0.00 USD
- **Employee Credits:** 0.00 USD
- **Vendor Credits:** 0.00 USD
- **Cash Advances Applied:** 0.00 USD

**Total Due Employee:** 25.00 USD  
**Total Due Vendor:** 0.00 USD

---

I certify that the information provided above is an accurate record of expenses incurred.

_________________________  __________________________
Employee Signature        Date
GET
  - Click “Tools” at the top, then select “Printer-Friendly View”
  - print and put in Kelly Hallmark’s mailbox

GET ID: G03013793

Example

example

Business Purpose: Business
Preparer: JENNIFER MARGARET HANRAHAN
Traveler: JENNIFER MARGARET HANRAHAN
Location: DUBLIN, IRELAND
Trip Dates: 09/11/2017 5:00 AM to 09/16/2017 5:00 AM

Expenses

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<tr>
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Total: $1,020.50

Employee Reimbursement: $1,020.50

Funding

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<th>Fund</th>
<th>Project ID</th>
<th>Program</th>
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<td>2</td>
<td>Expense</td>
<td>Report</td>
<td>$1,020.50</td>
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Activity

JENNIFER MARGARET HANRAHAN created the report today at 10:39 AM
Please contact the Business Office with any questions or issues!