

## So you're planning an event through the JD Grants Committee...

(last updated 9/6/18)

1. Request funding using the forms on the [JD Grants Committee webpage](#).
2. Submit the request by the [JD Grants deadline](#) that is at least 6 weeks before the date of the event you want to fund.
  - Example:
    - anticipated date of event: 11/10/18
    - JD Grants deadline for all events after 10/31/18: 9/15/18
    - you would need to submit by 9/15/18
    - not by 9/29/18 (6 weeks before event date)
3. Fill out and submit the necessary paperwork:
  - a. If the event is local, fill out [Local Event Funding Request](#)
  - b. If the event requires travel, fill out either:
    - i. Student organizations: [Travel Funding Request for Individuals and Student Organizations](#)
    - ii. Co-Curriculars: [Travel Funding Request for Co-Curricular Activities](#)

### Names to know:

- [Jennifer Hanrahan](#) (Law School faculty secretary)
- [Jennifer Gardner](#) (Law School accountant)
- [Adam Bushcott](#) (Law School main office manager)
- [Mary Ann Polewski](#) (JD Grants Committee)
- [Ursula Weigold](#) (JD Grants Committee chair)
- [Emily Kite](#) (Assistant Dean for Student Affairs)

# Travel guidelines

## GENERAL (explained in detail on the following pages)

- **Visitors/speakers**
    - These travel policies also apply to visitors/speakers for local events
    - It is your responsibility to inform your visitor/speaker of these policies
  
  - **Student orgs vs. individuals**
    - We will only be able to reimburse **individuals**; we cannot reimburse **student orgs**
  
  - **Required documentation**
    - For any travel or event:
      - approval (JD Grants form, email, etc.)
    - For airfare, lodging, and registration fees:
      - schedule, program, brochure, email invitation, etc.
    - For indirect routing, extra personal days, etc.:
      - cost comparison at the time of booking
    - If the event-lodging price exceeds the maximum:
      - proof that the event recommended that specific lodging
  
  - **Required receipts (digital copies are allowed!)**
    - Airfare
    - Car rental & gas
    - Lodging (use the itemized folio/receipt given at check-out)
    - If more than \$25.00: taxis, baggage, parking
  
  - **Meals**
    - Students cannot be reimbursed for meals when traveling
  
  - **14-day deadline**
    - Reimbursement requests are due 2 weeks from the conclusion of the event or last day of travel.
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# AIRFARE

## To book:

1. Send an email to Jennifer Hanrahan, noting the travel location and purpose, and provide the names and birthdates for all travelers, including visitors and speakers for local events.
2. Once the travelers have been added to Fox/Concur's approved travelers list, Jennifer Hanrahan will email you instructions for how to book (by email or by phone).

-These instructions will include a group reference code; you must use this reference code to prove the travelers have been approved.

3. Book the travel with a Fox/Concur agent; Fox/Concur will request final approval from Jennifer Hanrahan.
4. Once Fox/Concur receives that final approval, the airfare will be booked, and Fox/Concur will forward a copy of the itinerary(ies) to you and Jennifer Hanrahan.

- **Indirect routing/personal leg**

- Allowable:

- as long as no additional costs occur

- or*

- if there are substantial savings (including extra hotel rooms, parking, etc.)

- **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!)

- **Seat assignment fees**

- “Additional fees associated with booking coach/economy aisle, window or exit row...are allowable.”
- No fare class upgrades (first class, business, etc.) of anykind

- **Baggage**

- First bag within the airline’s limits—no questions asked  
-any bag after that, please explain
  - Student travelers will be reimbursed for baggage fees after the trip
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## **REGISTRATION/EVENT FEES**

- To pre-pay these on Law School purchasing card ahead of travel, please contact Jennifer Hanrahan
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## LODGING

- **Booking (both in Madison and out of town)**
  - To book, contact the hotel directly
  - When booking, explain that we will provide a credit card authorization form
    - the hotel should provide this form, but if the hotel doesn't, ask for it
    - if the hotel does not have a form to provide, the Business Office has a general form we can use
  - Forward credit card authorization form to Jennifer Hanrahan with hotel confirmation info
    - Jennifer Hanrahan will complete the form and forward it to the hotel ~2-3 days before your scheduled travel
  
- **Maximums**
  - Use [UWTravelWise Calculator](#) before travel for estimates
  
- **Issues during check-in**
  - If any issues occur at check-in (missing credit card authorization, etc.):
    - during business hours**, contact [Jennifer Hanrahan](#) (608-890-0202)
    - evening and weekend hours**, contact [Emily Kite](#)  
[-emily.kite@wisc.edu](mailto:emily.kite@wisc.edu)
    - office: 608-890-0115
    - cell: 608-405-2033
  
- **Please note:**
  - No guests: the only people authorized to access or stay in the room are UW Law students
  
- **Tax exemptions**
  - Tax exemption for lodging in Wisconsin, as well as:
    - Colorado -Florida -Idaho -Illinois -Kansas -Kentucky -Maine -Michigan -Minnesota -Mississippi -Missouri -New Mexico -N. Carolina -N. Dakota -Ohio -Rhode Island -Tennessee -Utah -Vermont -Virginia -W. Virginia*
  - Please see Business Office for documentation to provide to hotel
    - often we can include this with the credit card authorization form
  
- **Check-out**
  - Once you have returned from travel, forward the original check-out folio/receipt to Jennifer Hanrahan **ASAP** (digital copy is acceptable)

## DRIVER AUTHORIZATIONS

1. Confirm that all students who may be driving are authorized to do so through Risk Management's database and have familiarized themselves with Risk Management's rules. To check the database:
    - a. Use the Enterprise Fleet Management System [page](#) (you will need to be logged into your MyUW account to access this)
    - b. Logon as a UW "employee," then select "UW Madison" campus; this will take you to the main page.
    - c. Navigate to "Reports" at the top, and click on "Driver Summary"
    - d. Enter the driver's name and click "View Report"
  
  2. If the drivers are not currently authorized, they will need to register as a new user:
    - a. Review the [Policies and Procedures Manual](#)
    - b. Fill out the [Vehicle Use Agreement form](#)
      - if the driver has held a WI license for less than 2 years, or
      - holds a valid out-of-state license,
      - Risk Management will require a supplemental "driving abstract"
    - c. List Jennifer Gardner as the "Supervisor"

-It takes **10 working business days** to process driver authorizations.

-Due to volume, Risk Management cannot do rush jobs, so please plan accordingly!

-Student driver authorizations are valid for 1 year.
  
  3. Driver rules apply only to people associated with the University. Visitors and speakers for local events do not need authorization if they are driving their personal vehicles or rented vehicles.
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## FLEET VEHICLES

- **300 miles**
    - Use fleet vehicles if trip is more than 300 miles roundtrip
    - Examples:
      - Madison → Milwaukee = ~160 miles roundtrip
      - Madison → O'Hare = ~270 miles roundtrip
      - Madison → Minneapolis = ~540 miles roundtrip
  - **Driver authorizations**
    - Confirm that anyone who would be driving is authorized to do so by Risk Management (See previous section "Driver Authorizations" for information on checking the database and applying for authorization)
  - **Reservations**
    - Contact Jennifer Gardner to make reservations
  - **FYI**
    - If you need to cancel, do so within 24 hours the first day of the rental 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 the 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 alternative parking location! (receipts required if more than \$25.00)
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## PERSONAL VEHICLES

- **Driver authorizations**
  - Confirm that anyone who would be driving is authorized to do so by Risk Management (See previous section "Driver Authorizations" for information on checking the database and applying for authorization).
- **vs. fleet vehicles**
  - If trip is less than 300 miles roundtrip, a personal vehicle may be used
    - you may then be reimbursed for mileage (\$0.545/mile)

- **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.
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## **CAR RENTAL**

- **Booking**
    - University contracted
      - must use Enterprise or National
    - Send a request to Jennifer Hanrahan to book
      - will need the name of the driver & person who will pay
      - can't prepay, the driver will need to request reimbursement
      - must make separate reservations per car
    - 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.”
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## **TAXIS**

- Receipts required if more than \$25.00
  - Ubers & Lyft = taxis, are allowed!
  - Cannot be reimbursed for taxis to meals, sightseeing, etc.
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# Reimbursement

- **Student orgs vs. individuals**
  - We will only process reimbursements to individuals
    - In the past, we did process reimbursements directly to student orgs
    - However, the labor-hours in this process are prohibitive, and the IRS would need to be involved (so tax implications are too great ).

## DOCUMENTATION

- **Actual Expenses Report form**
  - Fill out the [Actual Expenses Report form](#).
  - This form is due to Mary Ann Polewski two weeks after the end of the event.
  - This report is required even if the Law School prepaid all expenses and no reimbursement is requested.
- **JD Grants Reimbursement Form**
  - Fill out the [JD Grants Reimbursement Form](#)
    - if multiple people are being reimbursed for one event, complete one reimbursement form per person
  - If you **are** currently employed by the university, Jennifer Hanrahan will send you a request to be an alternate via the Guided Expense Tool (GET) system
    - an email will be sent to your wisc.edu email
    - reimbursement will be direct deposit, like your paycheck
    - this is the fastest, least labor-intensive reimbursement process and is therefore the preferred method
  - If you **are not** currently employed by the university, Jennifer Hanrahan will send you a follow-up email, requesting:
    - the last four digits of your US taxpayer identification (SSN, ITIN, or EIN) or nonresident alien information
    - reimbursement will be a check mailed to the address you provided on the reimbursement form

- **Receipts**

- Provide any necessary original, itemized receipts, such as:
  - taxis more than \$25.00* -*internet fees* -*car rental & gas*
  - Google map (for mileage)* -*flight cost comparison (for indirect routing)*
  - flight itinerary* -*original hotel folio/check-out sheet (ASAP)*
- Digital copies are allowed

- **Documentation**

- JD Grants Committee decision letter
  - or email message from the Committee approving funding for the event
- Event documentation
  - Such as a program, schedule, or agenda

*You may turn in hard copies to Adam Bushcott in the Main Office or Jennifer Hanrahan's mailbox, or email digital copies to Jennifer Hanrahan.*

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# Local event guidelines

- **Event Planning Guide**

- For local events, please consult the Law School's [Event Planning Guide](#).

Of particular note:

-Student organizations and individual students need to obtain permission from Emily Kite before hosting an event in the Law School or on Law School grounds.

-You are responsible for disposing of food, putting away tables, straightening tables/chairs, etc. after your event.

-If the event or meeting is on property owned or leased by the University and food will be served, a university caterer must be used. Contact University Housing Catering or Union Catering.

-“Casual dining” food (subs, pizza, etc.) is not considered catering; can be purchased from any licensed restaurant

-Food purchased and prepared by students or staff, at home or elsewhere, is never allowed due to risk management issues.

-Alcoholic beverage service on University property requires its own protocol. Please contact Emily Kite for help.

-Visit the [Digital Print Center](#) on the 2nd floor of the Law building for copying of flyers, signs, brochures, name cards, etc. The design of original materials is up to you. If the Print Center cannot meet your needs, please contact Jennifer Hanrahan for assistance.