



# Travel & Financial Reference Guide



Updated July 2022

## UW Law School Business Office Contacts

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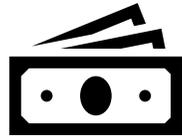
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# **PURCHASING GUIDELINES**



 **DISCLAIMER:** Please note that while this guide was created to serve as a quick reference to your travel and financial questions, it DOES NOT contain all of the University's detailed policies. ***It is the responsibility of each individual to ensure you are aware of and following the policies.*** Detailed policies can be found on the [Division of Business Services](#) website.

And as always, the Law School's Business Office staff are to assist you with any questions you may have.

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## General Purchasing Guidelines

- Documentation of a clear business purpose is required for all purchases or reimbursements using University funds. The more justification for purchase you can provide, the more likely you are to be reimbursed without any issues.
- Per [state statute](#), we are exempt from paying WI state tax as a public institution. You are encouraged to work with in-state vendors, and please note that we cannot reimburse sales tax if it is charged.
- There is a hard 90-day deadline for reimbursement submission. For travel-related reimbursements, the deadline is 90-days from the last day of business travel, though it is recommended that you submit conference registration and airline receipts for reimbursement immediately following purchase. For all other reimbursements, the deadline is 90-days from the date of purchase.
- A single transaction cannot exceed \$4,999. If you require a purchase over this amount, contact Jennifer Gardner-Brokmeier for assistance.
- You cannot sign your own contracts – no matter the amount. If you need a contract signed, contact Jennifer Gardner-Brokmeier for assistance.
- The purchase of printing-related items is regulated by Wis. Stats. Chap. 16. **Printing must be competitively bid for any purchase over \$49.99.** Please refer to the following link for the most common methods to acquire printing services: [How To Purchase A Printing or Copying Job.](#)

# TRAVEL



# UW Travel Agency

## Travel Inc. *(to book with a travel consultant)*

- Phone: 877-811-9898
- [UWTravel@travelinc.com](mailto:UWTravel@travelinc.com)
- Business Hours: 7:00 AM – 8:00 PM CST Monday-Friday (excluding holidays)
  - 24/7/365 Emergency Support is available outside of business hours; however, an additional (reimbursable) fee will apply

## Concur *(to book online)*

- <https://www.concursolutions.com/>
- [New User Registration Form](#)
- Designate someone from the Business Office to [book on your behalf](#)



**\*\*Booking flights, hotels, or auto rentals through third-party sites (e.g., Expedia, Priceline, Hotwire, etc.) is strictly PROHIBITED. You will not be reimbursed if booking through these sites.\*\***

# Travel Policies

## University Travel Policy UW-3015

<https://policy.wisc.edu/library/UW-3015>

- POLICY HIGHLIGHTS:
  - The University is generally exempt from the payment of Wisconsin sales and use tax.
  - The University will not pay or reimburse additional costs resulting from traveler preferences or changes in itinerary due to personal reasons.
  - The following policy-compliant expenses may be paid/reimbursed prior to travel:
    - Airline tickets and related charges
    - Conference and meeting registrations
    - Lodging, if required to prepay
  - Documentation of a clear business purpose is required for all purchases or reimbursements using University funds. **Provide your business purpose to Business Office staff when requesting a purchase or reimbursement.**
    - *Business Purpose is defined as one that supports or advances the goals, objectives and mission of the University. The stated Business Purpose must adequately describe the expense as a necessary, reasonable, and appropriate business expense.*

## International Travel Policy UW-3022

<https://policy.wisc.edu/library/UW-3022>

- POLICY HIGHLIGHTS:
  - Visas are payable/reimbursable when required for university business travel.
    - CIBT Visas
      - Visit <http://www.cibtvisas.com/wisconsin> or call 800-577-2428
      - Reference CIBT Account 32151 for reduced CIBT processing fees
  - Passport origination and renewal fees are payable/reimbursable when the need for a passport or renewal arises as a result of scheduled UW business travel.
  - Enrollment in [Cultural Insurance Services International \(CISI\)](#) travel insurance is required for all employees who travel abroad. The cost of the insurance is reimbursable.
    - Contact the Office of Risk Management if you have questions related to CISI: [travel-ins@bussvc.wisc.edu](mailto:travel-ins@bussvc.wisc.edu) or 608-262-8926
- Any purchase made using foreign currency must be converted to US dollars for reimbursement
  - [University-approved exchange rate calculator](#)
- [UW-Madison International Safety and Security website](#)



**\*\* Business travel is defined as one day before and one day after event dates for North American destinations, OR two days before and one day after event dates for other continental destinations.\*\***

## Airfare

<https://policy.wisc.edu/library/UW-3016>

- POLICY HIGHLIGHTS:
    - Flights shall be limited to the lowest, logical, non-refundable, coach/economy class fare available.
    - An international flight with eight hours or more of total flight time, including domestic segments, can be upgraded to Premium Economy class.
      - Premium Economy is located between Business and Coach and offers more leg room than Coach.
    - **Flights must be booked through Travel Inc. or Concur.**
      - Though rare, some foreign intra-country flights may be excluded from this policy. See the Business Office if you have questions.
      - **DO NOT USE THIRD-PARTY BOOKING SITES; THEY WILL NOT BE REIMBURSED.**
    - A cost comparison must be done **at the time of booking** if modifying business travel for personal reasons.
      - We recommend working with a Travel Inc. agent on cost comparisons; however, screen shots from Concur are also acceptable.
      - We can only reimburse for the lesser of the two cost comparisons.
  - When booking through Concur, be aware of “basic economy” fares. While often cheaper than economy, they are entirely nonrefundable and non-changeable – leaving you stuck with having to buy a whole new ticket if your plans change.
  - After booking with either Travel Inc. or Concur, you will receive an email from [UWTravel@travelinc.com](mailto:UWTravel@travelinc.com), and the subject line will include FINAL ITINERARY. In this email you will locate a copy of your e-invoice for reimbursement.
    - Please follow these [instructions](#) on how to retrieve your invoice from this email.
  - Submit your Travel Inc. invoice for reimbursement right after purchase – no need to wait until dates of travel to submit.
  - If you need to change/cancel your flight, the University will pay/reimburse for any additional fees, provided the circumstances were out of your control, e.g., the meeting dates were changed. You will need to provide supporting documentation for the change/cancellation when submitting for reimbursement.
  - A single piece of baggage within the airline’s weight and size limits is reimbursable. Additional luggage requires business justification. Receipts are required for baggage fee claims over \$30.
  - **\*NEW as of 7/1/2022\***: Additional fees associated with booking a coach/economy aisle, window, or exit row seat are payable/reimbursable. This is NOT to be confused with fare upgrades, which are typically not allowed.
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## Lodging

<https://policy.wisc.edu/library/UW-3017>

- POLICY HIGHLIGHTS:
    - You may book lodging one of the following ways:
      - Travel Inc.
      - Concur
      - Directly with lodging facility or conference organizer
      - AirBnB (all service fees should be included in daily lodging maximum)
    - DO NOT USE THIRD-PARTY BOOKING SITES; THEY WILL NOT BE REIMBURSED.
    - Travelers attending conferences or other business events not organized by the University may exceed the lodging rate maximum for the location if staying at the conference site or another hotel recommended by the conference organizer.
      - You will be reimbursed in full; however, you must supply documentation (e.g., conference brochure, email from conference organizer, etc.) that verifies the location of the event.
    - Travelers staying at non-conference hotels are limited to lodging maximums within the location rate.
      - [Lodging Maximum Calculator](#)
      - Some exceptions apply; see policy for details
    - **Please check with the Business Office before purchasing any lodging that requires prepayment.**
    - The University will not pay for lodging costs when travelers are within 50 miles of their home or headquarter city, unless the travel is for a multi-day event with an evening business-related activity that makes returning to the employee's home impractical.
  
  - Be sure to obtain and retain your hotel folio upon checkout. This document is required for reimbursement.
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## Meals and Incidentals Per Diem

<https://policy.wisc.edu/library/UW-3018>

- POLICY HIGHLIGHTS:
  - A meal and incidental per diem will be paid to you for your dates of travel. The per diem is determined by your travel location and dates of travel.
    - [Per Diem Calculator](#)
    - [Per Diem Calculator instructions](#)
  - There are per diem deductions for the first/last day of travel and for provided meals.
    - In your reimbursement documentation, please be sure to clearly note any meals provided to you as these will be deducted from your per diem reimbursement.
    - Note: Continental breakfast provided by a lodging facility or conference do not require a deduction from your per diem allowance.
  - Day trips with no overnight lodging can still receive a \$15/day per diem if the travel is expected to incur meal costs.
  - Per diem automatically includes \$5/day for incidentals (e.g., tips, transportation between places of lodging or business to obtain meals, laundry, bottled water, etc.)

- Please note that the per diem only applies to personal meals while traveling -- no receipt collection necessary!
  - However, if your meal is with others and business is conducted, it is considered a business meal, and a receipt must be provided for reimbursement. Learn more about business meals on page 15.

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## Vehicle Use/Rental

<https://policy.wisc.edu/library/UW-3019>



**\*\*Employees must be authorized drivers prior to using a vehicle on University business. This includes personal vehicles, rented vehicles, or UW-Madison fleet vehicles.\*\***

- Please refer to the Division of Business Services' website for instructions on how to [become an authorized driver](#).
  - Complete the [Vehicle Use Agreement \(VUA\)](#)
    - Log into the Enterprise Fleet Management System
    - Click on "Vehicle Use Agreement" under New Fleet Driver in the upper left box
    - Upload your out-of-state driver's license and a copy of your driving record, if needed
    - Complete the form
      - UW UDDS Code = UA451000
      - Supervisor = Jennifer Gardner-Brokmeier, [jennifer.gardner@wisc.edu](mailto:jennifer.gardner@wisc.edu)
  - Driver authorizations can take up to **10 business days**. Please plan accordingly!
- **PERSONAL VEHICLES / MILEAGE**
  - Reimbursable at the Standard Rate of \$0.625/mile.
  - If driving more than 300 miles roundtrip, a rental car or fleet vehicle is encouraged (see more about fleet vehicles below).
    - If using a personal vehicle, trips exceeding 300 miles roundtrip will be reimbursed at the turndown rate of \$0.405/mile.
      - Note: Rates listed above took effect as of July 1, 2022.
  - Travelers are reimbursed the lesser of the two:
    - Mileage to/from their *personal residence* to/from their destination; or
    - Mileage to/from *UW-Madison campus* to their destination.
  - Mileage reimbursements must be documented by a [Google Maps](#) printout or screenshot.
- **VEHICLE RENTAL**
  - Book through Travel Inc. or Concur.
  - Must use Enterprise or National.
  - Limited to mid-size SUV vehicle classes and below.
  - Travelers are responsible for refueling the rental vehicle prior to return, which is a reimbursable expense (receipt required). Vendor refueling or prepay fuel packages are not reimbursable.

- Do not take the insurance; it cannot be reimbursed. (UW contracts already include collision [CDW] and liability [LDW] insurance coverage for U.S. originating rentals.)
- Submit the original vehicle rental agreement for reimbursement.
  
- **UW-MADISON FLEET VEHICLE**
  - The University has a fleet of vehicles that can be reserved for business use.
  - Recommended if driving more than 300 miles roundtrip.
  - A member of the Business Office will book on your behalf.
  - For more information, visit the [Transportation Services](#) website.

## **Taxi/Subway/City Bus, etc.** – includes Uber and Lyft

<https://policy.wisc.edu/library/UW-3020>

- Receipt required for claims over \$25
  - Maximum of 20% gratuity is allowed to be reimbursed
  - Unless easily identifiable on the receipt, be sure to indicate origin and destination of travel for each transaction
  - Please note that transportation to meals is included as part of your per diem and cannot be claimed separately
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## **Parking**

- Receipt required for parking claims over \$25
  - Unless easily identifiable on the receipt, be sure to indicate the location of parking and how long you were parked
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## **Tolls**

- Receipts required for claims over \$25
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## **Registration Fees**

<https://policy.wisc.edu/library/UW-3021>

- Can be paid with Business Office purchasing card (Pcard) when the event does not include an online/virtual component, otherwise best paid for by the faculty/staff member and reimbursed
- Supporting documentation needed for reimbursement, which should include:
  - Name of the event
  - Business purpose for attendance
  - Event dates and location
  - Amount of registration fee
- Submit for reimbursement right after purchase – no need to wait until the event to submit

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# **EXPENSE REIMBURSEMENT**



# Expense Reimbursement

<https://policy.wisc.edu/library/UW-3024>

- POLICY HIGHLIGHTS:
    - **Claimants have 90 days to submit their expense reports.**
      - Travel-related expenses = within 90 days from the end of the business trip
      - Non-travel-related expenses = within 90 days of the date the expense was incurred
    - Documentation of a clear business purpose is required for all purchases or reimbursements using University funds. **Provide your business purpose to Business Office staff when requesting a purchase or reimbursement.**
      - *Business Purpose is defined as one that supports or advances the goals, objectives and mission of the University. The stated Business Purpose must adequately describe the expense as a necessary, reasonable, and appropriate business expense.*
  - You can complete your expense reimbursement one of two ways:
    - Complete it yourself
      - [Procedure 3024.1 – Creating and Submitting an Expense Report in e-Reimbursement](#)
    - Have one of the Business Office staff (i.e., Adam Bushcott or Erin Chuzles) complete it for you
      - [Procedure 3024.2 – How to Assign an Alternate](#)
  - Payments are processed within 3-5 business days of an expense reimbursement's final approval.
    - Employees who receive their paychecks via direct deposit will receive their reimbursement payments via direct deposit as well. It will be a separate deposit from the employee's regular paycheck.
    - All others will receive payment via check in the mail.
  - Note that credit card statements cannot be substituted for receipts.
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## Travel Reimbursement

- Items needed for travel reimbursement:
  - Business purpose
  - Conference/meeting information including dates, location, agenda
  - Completed [Law School Business Office E-Reimbursement Form](#)
  - Airfare: Invoice from Concur/Travel Inc.
    - Can be reimbursed immediately after booking; no need to wait until dates of travel to submit for reimbursement
  - Baggage: Receipt if over \$30; business justification needed if more than one bag
  - Hotel: Folio received at checkout
  - Mileage: Google Maps printout of the route taken
  - Vehicle Rental: Original rental agreement
  - Taxi/Subway/City Bus: Receipts if over \$25

- Parking: Receipts if over \$25
  - Tolls: Receipts if over \$25
  - Registration Fees: Brochure, flyer, or similar with event details and amount paid
    - Can be reimbursed immediately after booking; no need to wait until dates of the event to be reimbursed
- No receipts necessary for personal meals. You will be paid a [per diem](#) based on the location of travel.

## Other Reimbursable Expenses

- **PROFESSIONAL MEMBERSHIPS**
  - Membership fees to professional associations are allowable at *annual increments*; multi-year renewals are not permitted by the University.
- **SUBSCRIPTIONS**
  - Subscriptions to print or digital media are allowable at *annual increments*.
- **CLASS TREATS**
  - The Law School has a \$100 per class per semester treat policy that allows professors to purchase treats for students throughout the semester.
  - When submitting for reimbursement, include an itemized receipt and a copy of your class roster (without photos)
- **BUSINESS MEALS**

<https://policy.wisc.edu/library/UW-3039>

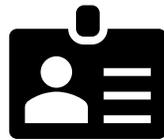
  - Definition of a business meal: *A breakfast, lunch or dinner with a UW business purpose attended by multiple individuals. Business meals are not catered, do not require a contract, and do not require a space or room rental.*
    - e.g., taking a guest speaker or job candidate out for dinner after an event
  - Payment/reimbursement of business meals using UW funding is limited to the following, per person, including tip:

Type of Meal	Within Wisconsin	All Other Continental US	International (+ HI & AK)
Breakfast	\$20	\$23	\$35
Lunch	\$21	\$24	\$40
Dinner	\$35	\$43	\$60

- Amounts in excess of the allowable per person limits or expenses for alcohol may be charged to Wisconsin Foundation and Alumni Association funds, if available.
- Alcohol reimbursement cannot exceed \$25/person.
- Tips are limited to 20%.
- Sales tax is not payable/reimbursable for business meals in Wisconsin.

- Present the Department of Revenue approved tax-exempt wallet card to your waitstaff prior to payment.
      - The wallet card can be obtained from Adam Bushcott in the Main Office.
  - While spouses/partners are welcome to attend speaker and candidate dinners, their portion cannot be reimbursed, unless the spouse/partner is part of the business being conducted.
  - When submitting for reimbursement, complete the [Law School Business Office Events-Meal Payment Form](#), and attach an itemized receipt that also indicates the tip amount, a list of those who attended the meal, and a meeting agenda/flyer for the event.
- **BOOKS**
  - The Business Office recommends purchasing books through our tax-exempt Amazon account. Please contact Adam Bushcott or Erin Chuzles to request purchase.
    - When requesting purchase of a book, please be sure to include a **business purpose** for the purchase.
    - Books purchased from Amazon will be shipped to the Law School and typically arrive in 2-days. Books will be placed in your mailbox upon arrival.
    - NOTE: If you purchase books from Amazon yourself and submit for reimbursement, the sale tax is NOT reimbursable.
  - If purchasing with a specialty supplier, you can purchase on your own and submit for reimbursement OR contact a member of the Business Office to purchase on their p-card.
    - NOTE: All personally purchased items (books, magazines, newspapers, etc.) that will be reimbursed with University funds, MUST be shipped to the Law School's address: UW Law School, 975 Bascom Mall, Madison, WI 53706. Exceptions may be granted under special circumstances.

# 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 \$24.82/hour
  - **STUDENT HOURLY**
    - Pay range is \$10/hour or greater (you set the rate, but the Business Office can advise)
    - Limited to a max. of 20 hours/week when school is in session
    - Can be law or graduate students, but not required
    - You must go into HRS and approve students' hours every two weeks
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## Hiring 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 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

Questions regarding student hiring?  
Please contact Kelly Hallmark.  
[kelly.hallmark@wisc.edu](mailto:kelly.hallmark@wisc.edu) | 608-262-3138