# Travel Updates

Fiscal Year 2017 report and new for Fiscal Year 2018

# Travel Updates – Agenda Items

- Introductions:
  - Gretchen Waide, Tiffani Bowles, Amanda Snyder, Matt Cushing, Susan Wilhelm
- Booking Travel – Concur or Anthony agent assisted
  - $ amount of bookings has grown substantially
- Timings of Postings
- WEX/Grasp Pay/Travel Cards
- Basic Economy Fares
- Unused Tickets
- Terri Hall – dedicated travel agent from Anthony for U of L
- Travel & Expenses work flow
  - PeopleSoft T & E updates
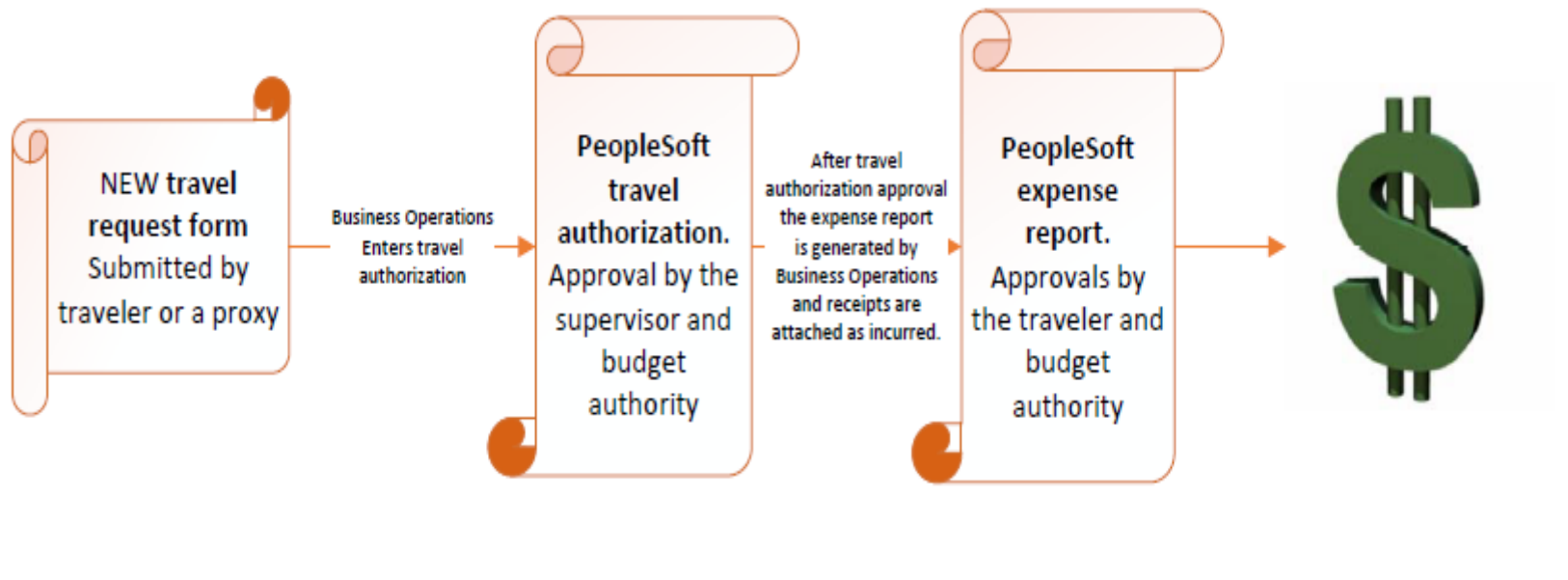  - Pre-authorizations – req'd for International travel

# Travel

- Parking Lot – issues still needing to be addressed

# Travel and Expenses Work Flow

- New process developed by Business Operations Travel team
- Pilot with A & S, VPFA – soft launch in August



NEW travel request form Submitted by traveler or a proxy → Business Operations Enters travel authorization → PeopleSoft travel authorization. Approval by the supervisor and budget authority → After travel authorization approval the expense report is generated by Business Operations and receipts are attached as incurred. → PeopleSoft expense report. Approvals by the traveler and budget authority → $

# Travel Updates

- **TSA Update: Real ID's required for air travel beginning 1/22/2018**
  - KY Driver's License extension until 10/10/2017
  - Passport, Passport cards, US Military ID, others – see TSA website
  - IN Driver's License is in compliance with Federal regulations
  - https://www.dhs.gov/real-id-public-faqs
- **Unused Tickets**
  - $39,942.88 in unused tickets (we may be able to recoup $25,000)
  - Communication directly to travelers
  - Unused tickets show up when booking travel for that person
  - Expires a year from original booking date
  - Minimum $200 charge to change to a different flight
  - If original traveler cannot use within 9 months, we will pay fee to change name to get some credit for original cost

# Travel Updates – Car Rentals

- (Almost) All Enterprise/National Car rentals have been posted for FY 2017
  - A few haven't been allocated because of missing speed types
- **Free** Car day rentals available – **call me! 852-6273**
- Reconciliation process developed, and will be done monthly
  - June – **only 51 out of 102 rentals** had valid speed types –
    - This may be a reporting issue that we are investigating
  - Many students renting cars
  - All drivers need to have a valid speed type to rent vehicles

# Travel Updates - Concur

- Broad use of Concur for travel booking
- Growth has been excellent
- We are going to automate the assignment of account numbers
- We will automate the assignment of speed types from the default
- We will automate the process of setting up profiles for all full time, regular employees as a part of the onboarding process
- Traveler (or arranger) can change the speed type from the default as needed on a trip by trip basis  Speed types will be validated in Concur
- Make sure travelers have a default speed type in their Concur profile
  - We will be reaching out with a list of travelers from your area to verify defaults

# Travel Updates – WEX/Grasp Pay

- WEX is an outside bank, Grasp Pay is their process
- Travelers get an email with the Virtual cards to use for Hotels only
  - Valid for the specific dates of travel
  - Valid for the booked hotel only
  - Will cover room, taxes, resort fees, WiFi, parking
  - When checking in, travel should verify that hotel has the Virtual card for room charges – show them the email copy if necessary – 502-369-4260 or 502-388-3770
  - Personal cards should be for extras only – movies, room service, mini bars
  - Travelers should **pick up and review folio** when checking out to verify accurate charges

# Travel Updates – Travel Cards

- Banking RFP is "on the street"
- Plan is to implement Travel Cards with Banking vendor
  - Need working group to develop travel card process/policy
    - Email Mary AC if you want to volunteer
  - We've already begun getting benchmark data from other schools
  - We believe this will eliminate most/all of the issues with hotels

# PeopleSoft T & E Updates

- Home Page
  - Navigation:  Employee Self Service Home Page>Expenses Tile>Create Expense Report
  - In the general Information Page, 'From' and 'To' dates have been added
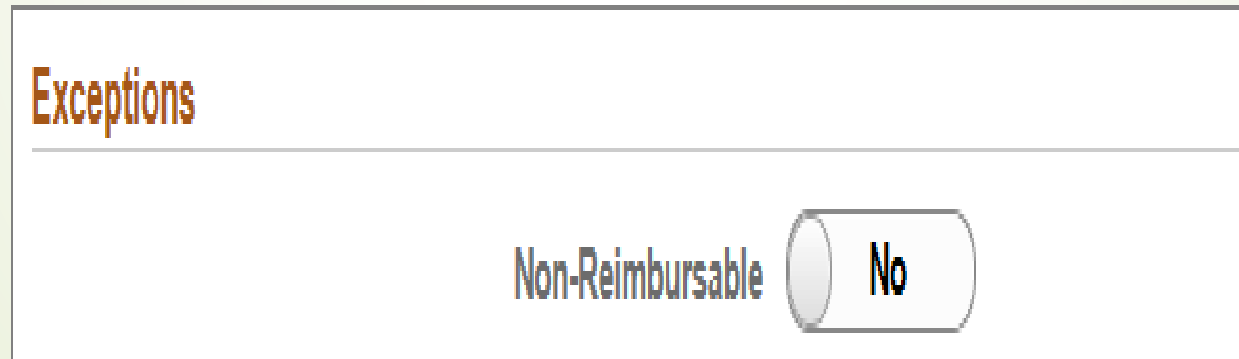
# PeopleSoft T & E Updates

- Exceptions
  - In the Exceptions section of the Expense report tile, the label for 'Reimbursable/Non-reimbursable' has been updated from 'Personal' to 'non-reimbursable' to align with the classic Expense report under the navigation menu.

**Exceptions**

Non-Reimbursable   No

# PeopleSoft T & E Updates

- Navigation Menu

- Employee Self-Service>Travel and Expenses> Travel Authorizations>Request Travel Authorization

- In the Projected Expenses section the 'non-reimbursable' check box is now available to edit upon entry and for those who approve

- **Non-refundable**
- **Non-changeable**
- Only single carry-on allowed – must fit under seat
- One checked bag is allowed at normal charge for that airline
- Final group to board – seat assignment not available ahead of time

# Additional Notes:

- They are working on a new reconciliation process for travel. They are hoping to (going forward) have all travel posted by the 15th of the month. They are still working on this.
- WEX/GraspPay is not working as well as they had hoped. Please encourage all travelers to take a copy of this with them upon check-in at hotels.
- They are possibly switching to travel cards. There will be limitations on who receives a travel card. The thought is anyone traveling 2+ times a year will have a travel card in their name.
- There will be updates to the T&E system to incorporate business ops. There will be a soft launch in August.
- If you have employees needing a rental car for a day, please call Mary Alexander-Conte. She has coupons for free rentals.
- Many of the issues with hotels not posting is related to the lack of a speedtype on the reservation, so making sure there is a speedtype will increase how quickly they post.
- Going forward, new employees will be added to Peoplesoft and Concur for travel when they are put on with onboarding. Still working out some kinks and will communicate info as it is received.
- If we have a hotel that has not posted, but is on the grid sent to UBMs, please send a note to Tiffany Bowles.

# Terri Hall, Anthony Travel Specialist Gretchen Waide, Director of Operations

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