Travel Process Reference Guide

**Complete these steps ONE MONTH prior to your trip date**

**Travel Authorization Form** — Fill in Name of Org, Destination, Departure Date, Return Date, Purpose of Trip, and Mode of Travel. **Student organization trip leader must sign the form.** Do not complete the Accounting Information section. This form should be returned to OFO along with the other information at least one month prior to your trip date. Once the OFO supervisor signs this form, your trip is approved.

**Travel Form** — Every person planning to travel must print their name legibly on this form and indicate whether they are a student or not. Special rules apply to non-students. Return this form to OFO along with the Travel Authorization Form. **NOTE: All who sign up are personally responsible for any funds spent that cannot be recovered, even if they do not go on the trip!**

**Drivers Authorization Form** — Anyone who is planning to drive a personal vehicle or rental vehicle must complete this form. This form is available at OFO or at http://www.uwgb.edu/fleet/agreement.asp. If completing it yourself, fill in your name, check that you’re a student, Department = OFO, email = your email@uwgb.edu, Supervisor’s name = Lea Truttmann, and Supervisor’s email = stofo@uwgb.edu. Once you click to submit the information, you will have to print the form, fill in your driver’s license number, state, date of birth and then sign and date the form. Once completed, return the form to OFO. This form needs to be completed for anyone wishing to drive for org trips and it needs to be redone every year after September 1. Non-students are NOT permitted to ride in a rented vehicle through the university. If a student will be driving their personal vehicle, a non-student can ride along, but the student needs to fill out a drivers authorization form and be approved. If a non-student takes their own vehicle on an org trip, we cannot reimburse them, but a UWGB student could ride along with them.

**Mode of Travel** — Please check the box of which mode of travel you plan on taking – Enterprise rental vehicle, plane, personal car, or other. Remember, regardless of whether you take rental or a personal car, anyone who is planning on driving must be driver authorized (process is above). Prior to the date of travel, you must get a form from OFO that authorizes you to drive the vehicle. If the trip requires driving over 300 miles in one day, each vehicle will need two or more authorized drivers. **If you wish to cancel reservation vehicle, you must tell our office at least 48 hours before you were planning on leaving.** If you are traveling via plane, see OFO prior to making any arrangements.

**Hotel Information Form** — OFO will make any reservations your org may need after your trip has been approved. The org must fill out the Hotel name, address, phone number, arrival and checkout dates, number of rooms, and type of room requested. Special rules apply if staying at a hotel in Wisconsin. Please see OFO for a list of approved hotels. Even if the university pays for the hotel, your organization may be required to present a credit card at the hotel for incidental charges only.

**Event Advertising** — Student orgs using SUFAC money to fund their travel must advertise in two forms of media throughout campus. Minimum information to include: event, location, dates, organization name, and contact information

**1/3 Contribution** — Student orgs using SUFAC money to fund their travel must contribute 1/3 of the total trip cost and any costs spent above your allocated amount. Ask OFO for more details.

**Registration Fees** — OFO is able to pay registration fees related to travel. Bring in billing info to OFO.
NAME OF STUDENT ORGANIZATION

DESTINATION

DATES
DEPARTURE RETURN

PURPOSE OF TRIP (Name of conference or event)

MODE OF TRAVEL

- Enterprise Rental Car or Van
  - Student Organization Trip Leader Date
- Plane
  - Organization Finance Officer Date
- Personal Car
  - Supervisor Date
- Other

ACCOUNTING INFORMATION

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PERSONAL/NON-UW AGENCY

TOTAL ESTIMATED COST

Note: If an airline ticket is charged directly to the University on the University’s corporate airfare charge card, a copy of this form and electronic approval must be forwarded to Travel Coordinator in the Controller’s Office, ES 109.

For travel problems/questions, call:
  If Monday-Friday during business hours, call OFO: Office: 920-465-2258
  After hours and on weekends, call Lea: Cell: 920-327-3023
  If OFO is not available, call John Landrum:
    Office: 920-465-2532
    Cell: 920-406-0562

Rev. 09/15/17
Travel Form for Student Organizations

DATE:_________________________

ORGANIZATION:_________________________________________

DESTINATION:___________________________________________________

DATE(S) OF TRAVEL:_________________________________________________________

PURPOSE:_________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________
__________________________________________________________________________________________

NOTE: All who sign up are personally responsible for any funds spent that cannot be recovered, even if they do not go on the trip!

MEMBERS ATTENDING
Name:        Student or Non-Student:

____________________________________   ________________________
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Hotel Information Sheet

Before your hotel request can be processed, your organization must fill out all Travel Authorization Forms.

Hotel Name: ____________________________________________

* All in-state hotel locations must be on the state pre-approved hotel list. Ask OFO for details.

Address:    ______________________________________________
            ______________________________________________
            ______________________________________________

Phone Number: (____)-____-______
Fax Number:  (____)-____-______

Dates:    Arrive ___/___/___   Checkout ___/___/___

Number of Nights: __________  Number of Rooms: __________

Type of Room:  2 Double beds         King          Queen          Other __________
Price per Room: $__________

OFFICE USE ONLY

Confirmation Number: _______________________    Name Under: ________________________
Confirmation Number: _______________________    Name Under: ________________________

Check in:  ____________________________               Check out:     _____________________
Cancellation Policy:     __________________              Quoted Rate: _____________________

Checklist:
Approved Hotel: ________   Tax Exempt: ________   Fax Charge Authorization: ________
Entered in Outlook: ________   Entered in Travel Log: ________   Contact org. with info: ______
**Enterprise Rental Program**

The University of WI Green Bay works in partnership with the local Enterprise rental company to provide rental vehicles to students traveling on University business. **Any person traveling on University business MUST be driver authorized prior to departure.** *(Please see Lea a minimum of two weeks in advance of trip date to complete paperwork)*

Enterprise will pick up/drop off vehicles during working hours ONLY and with proper notice (24 hours)

Enterprise hours are as follows:
- Monday-Friday 7:30am to 6pm
- Saturday: 9am to 11:30am
- Sunday: Closed

**Address:** 2260 Main St Green Bay WI 54311
**Phone:** (920) 469-5262

*Fill up vehicle with gas before returning. There is an additional charge if the vehicle comes back empty. This charge will be the student’s responsibility!*

*If returning vehicle after business hours, Enterprise has a drop box for the vehicle car keys. Please make sure to lock the vehicle and put the keys in the lock box.*

**Rates are as follows:**
- Full size vehicle (Nissan Altima, Toyota Camry, Chevrolet Malibu, or similar) $34/day
- Minivan (Dodge Stow N Go, or similar) $54/day

*Gas is NOT included in price. This is the responsibility of the student. If you would like to be reimbursed for, gas, please keep all gas receipts and verify with org trip leader to receive reimbursement approval. You will be reimbursed for gas receipt amounts only.*

*All vehicles include unlimited free miles per day and per week.*

**In case of an accident:**

The procedures for reporting an accident are consistent with the information provided online [http://www.uwgb.edu/risk-management/operation-of-vehicle-on-university-business/overview/] and in the drivers authorization materials;

**Accident Reporting**

In the event of an accident, it is the responsibility of the driver to immediately report the accident to the following:

- Police
- University Supervisor/Manager
- University Risk Management
- Rental Vehicle Supplier

Additional procedures can be found at [UW System Risk Management](http://www.uwgb.edu/risk-management/operation-of-vehicle-on-university-business/overview/).
**Roadside assistance:** Breakdown assistance is NOT included in the Big Ten contract. Enterprise charges $5/day for this protection. Enterprise will not automatically add this to the bill; drivers are given the choice to add this coverage. The cost of this service is the responsibility of the driver. **UW System policy does not allow for reimbursement for roadside services/towing.**

**What if my Enterprise car has service problems or breaks down?**

If service problems arise during normal business hours, you can call the local Enterprise branch or you can call Roadside Assistance at **800-307-6666**. Please keep in mind, Roadside Assistance charges will vary depending on the situation. Most preventable issues such as running out of gasoline or locking keys in the vehicle will result in a service fee assessed to the rental by Enterprise Rent-A-Car.

**Enterprise gas or additional charges agreement.**

I, _____________________________________________________, understand that by renting a vehicle from Enterprise Rental under the University contract, that I am responsible for filling up the vehicle with gas PRIOR to returning it to Enterprise. I am also responsible for any damages. Any such charges will be recovered from the student organization or the individual driver before the semester or school year ends.

Date___________________

Signature________________________