Disbursements & Travel Services Office

Travel Updates

UTSA Faculty Senate
March 21, 2013
Travel Agency and Car Rental Agency History

- 82nd Legislature, Senate Bill 5
  - Exempted higher education from requirements that govern participation in state travel contracts

  - Must use approved travel agency, airlines, and car rental agency
  - Goal is to minimize cost while improving overall service
UT System – Issued RFP/Goal

• Streamline contract management
• Improve reporting
• Minimize Cost
• Improve overall service focusing on traveler
• Provide innovative use of technology
• System wide savings of 15%
New Requirements

All travel bookings effective May 13, 2013 & after

• Flights
  – Must use designated travel agencies

• Car Rentals
  – Must use designated car rental agencies

• Hotels
  – No change
Approved System-wide Travel Agencies

- Corporate Travel Planners
- Anthony Travel
  - Both have been UTSA travel agencies since January 2009
Travel Agency Options

• Corporate Travel
  – Call agent – full service (most expensive, varies based on services)
  – Use On-line System (called CONCUR) – robust, less expensive

• Anthony Travel
  – Call agent – full service
  – No online system available
Travel Agency

Airline options

• Can book with any airline as long as agency is utilized to book flight
• However, American, United, Southwest, Jet Blue provide 2%-40% discounts based on the fare paid and destination
• Agency must notified when airfare is subject to Open Skies/Fly America Act

Note: CLIBA card must be used to purchase airfare to receive contracted rates
Travel Agency

• Traveler is responsible for notifying travel agency when airfare is subject to Open Skies/Fly America Act.

• Applicable when airfare is purchased with grants and federal funds.
Travel Agency Benefits

• Streamlined contract management
  – Uniform service standard requirements
  – Travel Agency – Management Fee provides a lower overall cost system-wide (replaces “per transaction” fee)

• Enhanced Service Requirements
  – Experienced agents/Designated account managers
  – Minimal hold time
  – Familiar with institution’s travel policy
  – Agents have
    • the ability to view all airlines schedules and fares
    • airline executive desk status for assistance with waivers and fare matching
Travel Agency Benefits

• Auto enrollment in ISOS
  – All reservations including domestic can be tracked during emergency situations.
  – Complies with UT System requirements

• Innovative use of technology
  – On-line travel tool (Called “Concur”)

The University of Texas at San Antonio
Travel Agency Benefits

• Improved Management Reporting
  – Improved reporting on travel cost
  – Lost savings and realized savings
  – Automated notification to travel for unused ticket
Approved System Wide Car Rental Agencies

- UTSA travelers are required to use one of the approved car rental agencies
  - Avis/Budget
  - Enterprise/National
  - Hertz
Car Rental Agency Options

• Car Rentals
  – Must use designated car rental agencies
    (Avis/Budget, Enterprise/National, or Hertz)
  – Two choices for booking:
    • Through designated rental agencies (no transaction cost)
    • Through approved travel agency
Car Rental Agency Benefits

• Multiple options on rental company, car type and rental locations
  – Each agency has express service option
  – Frequent rental rewards
  – Discounts on international rentals
  – Free car upgrades and choose your own car options

• Additional services provided
  – Box trucks
  – Car Share Programs
Hotel Reservation Options

No Change in Choices:

- Continue to refer to the State Comptroller contract hotels listed on the state website
- Reimbursement – no change (based on the per diem rate)

• Booking Options
  - Make hotel reservations using the travel agencies
  - Other methods (contact hotel directly or hotel website)

• Online tool

• GSA lodging rates still applicable (no change to justification)
Transition to Management Fee

• Current travel agency fee
  – Per transaction
  – Charged at the time airfare is purchased

• New Management Fee
  – UTSA will be invoiced monthly by travel agency
  – Departmental accounts will be charged back for management fee
  – Expected to be 15% less than the current “per transaction” fee
  – On-line transaction fee significantly lower than full service fee
Travel Policy Changes

• Who is affected by these changes?
  – All employees of UT System and The University of Texas Investment Management Company to include:
    • Students
    • Guests
    • Consultants traveling on behalf of UT System
    • Patient travel when in the care of a UT Medical Institution

• Who is excluded?
  – Athletic Travel
  – Group (students) Travel
UT System Approved Exceptions

• Travel cost paid by an outside entity (not including grants)

• Emergency situations (flood, hurricane, etc)

• For exact comparisons
  – UTSA’s travel agency is unable to provide an airfare within $100 of a lower fare available
  – Approval required in advance of purchase:
    • Travel arranger must:
      – gain approval from Diana Macias-Ollervidez x6915 or Nora Compean x4831
      – Provide written documented proof of lower fare. Flight must be on the same day with the same restrictions/booking class
Non-Compliance

Travel/travel arrangers are given one exception

1st Instance of Non-Compliance/failure to use approved Travel Agency or Car Rental Agencies

- Notification will be sent to respective Vice President, Account Administrator/Supervisor and traveler/travel arranger
- Reminder to use approved agencies sent along with copy of the new policy
- Attendance at travel information training session will be encouraged
Non-Compliance (cont’d)

2nd Violation of non-compliance

- Notification sent to respective Vice President, traveler and travel arranger
- Another reminder to use approved agencies sent along with copy of the new policy
- Prior to future travel, both traveler and arranger will be
  - Required to attend travel training class (even if already attended)
  - Traveler required to submit a memo to respective VP explaining why approved agencies were not used
Further Violations – 3 or more

- Management including respective VP will be notified
- Traveler will:
  - not be reimbursed for policy-related trip expenses
  - Suspended from future travel until allowed by the VP
- Will be handled by VP consistent with progressive disciplinary process
Information & Training Sessions

• Memo distributed March 1, 2013

• Training Classes
  – Schedules to be distributed (March, 2013)
  – Attendance strongly encouraged for
    • Travelers, traveler arrangers, those responsible for authorizing travel arrangement, card payments and reimbursements
Thank you for your support and cooperation.

Questions:
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QUESTIONS?