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Corporate Travel Planners: Concur Online Reservation Tool and Travel Arrangers/Guest Travel (AM685/686)

Disbursements and Travel Services

Presenters: Ken Allen, VP of Customer Success for CTP

Ana Anaya, DTS Coordinator

Summer 2022

Approved UT System Travel and Car Rental Agencies

- Travel Agencies (UTSA travel agencies since January 2009)
 - Corporate Travel Planners (CTP)
 - Anthony Travel
- Car Rental Agencies
 - Avis/Budget
 - Enterprise/National
 - Hertz

Type of Travelers Required to Use Travel and Car Rental Agencies

- All employees of UT System and The University of Texas Investment Management Company who will be requesting reimbursement for travel. This includes UTSA employees.
- All student(s)/guest(s) whose travel is booked by UTSA using a One Card

Groups Exempt from Using Travel Agencies

- Athletic Travel
- Group (student) travel
- Student(s)/Guest(s) paying for travel up front
- Employees not requesting airfare or car rental reimbursement from UTSA

Travel Agency Benefits

- Streamlined contract management
 - Uniform service standard requirements
 - Management fee provides a lower overall cost system-wide (replaced “per transaction” fee)
- Enhanced Service Requirements
 - Experienced agents/Designated account manager
 - Minimal hold time (average 1 min 4 seconds)
 - Institution’s travel policy experts.
- Travel agency agents
 - Airline content: UT Contract rates and State Rates
 - Can provide airline executive desk status for assistance with waivers and fare matching

Travel Agency Benefits (cont'd)

- Auto enrollment in [On Call International](#)
 - Effective 12/31/2021
 - All reservations including domestic can be tracked during emergency situations
 - Complies with UT System requirements
 - [Visit Global Initiatives – On Call International](#)
- Innovative use of technology
 - Concur (online reservation tool)

Travel Agency Options

- Corporate Travel Planners (CTP)
 - Full service - Call agent (higher cost, varies based on service)
 - Online booking tool (Concur) – robust system, lower cost
- Anthony Travel
 - Full service – Call agent
 - No online system available

Please note: The supplier ID for CTP was updated effective 9/25/20 – must use ID #0000113119

Booking Requirements

- Flights
 - Must use designated travel agencies
- Car Rentals
 - Must use designated car rental agencies
- Hotels
 - Can call or book directly through hotel website, or use Concur

Traveler Booking Requirements

- Travel Authorization ID (10-digit number) if employee; if other, type in “Student” or “Guest”
- Cost Center to which the management fee will be charged
- State credit card (One Card) to maximize UT System discounts and savings; required if traveling on Grants or State funds

Travel Agency

- Airline options
 - Can book with any airline as long as agency is utilized to book flight
 - However, American(AA), United(UA), Southwest & Delta provide 2% - 20% discounts based on the fare paid and destination
 - Agency must be notified when airfare is subject to Open Skies/Fly America Act (applicable to grants)

Travel Agency

- **Basic Economy** Flights blocked in Concur
 - Applicable to American, United and Delta
 - Do not guarantee seating (travelers are on stand by)
 - Non-refundable tickets but lower in price
 - No changes allowed; does not allow for upgrades
 - Traveler is in last boarding group
 - No baggage or carry on luggage allowed in overhead
 - Found under “*View More Fares*”
 - Users may see alert “*No Fares Available/Unable to Price Selected Results*”

Car Rental Agency Options

- Car Rentals
 - Must use designated car rental agencies (Avis, Budget, Enterprise, National or Hertz)
 - Three choices for booking:
 - Through designated rental agencies (no transaction cost)
 - Through approved travel agency
 - Through Concur

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
- Additional services provided
 - Box trucks
 - Car Share programs (e.g. Zipcars
<https://www.zipcar.com/universities/university-of-texas-san-antonio>)

Hotel Reservation Options

- The State Travel Management Program (STMP) has contracted with online reservation provider Hotel Engine to offer booking in Texas and globally. Because booking through Hotel Engine is optional for Higher Education institutions, UTSA has opted out at this time. Travelers must continue to book hotels nearby business points. Travelers must always request government or State rates when available—or lowest cost to the State.
- Compliant with GSA per diem lodging rates
- Booking options
 - Use Concur (commissions earned)
 - Reserve lodging using the travel agencies
 - Other methods (contact hotel directly or use hotel website)

UT System Approved Exceptions

- Travel cost paid by an outside entity (not including grants)
- Emergency situations (flood, hurricane, etc.)
- For exact comparisons (apples-to-apples)
 - UTSA's travel agency 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 (x=6915) or Nora Compean (x=4831)
 - Provide written documented proof of lower fare. Flight must be on the same day with the same restrictions/booking class criteria

Non-Compliance

- Traveler/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 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 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 VP
- Will be handled by VP consistent with progressive disciplinary process

Handling of Management Fee

- UTSA is invoiced monthly (lag between months)
- Divisions will cover the costs when payment is processed
- Some divisions will charge back departments (check with your department managers)
- Online transaction fee significantly lower than full service fee

How to Get Setup in Concur

- Send email to DTS inbox (disbursements.travel@utsa.edu) requesting self-registration link (user must be an employee)
- Complete self-registration and wait for access approval (within 1 working day)
- Once approved, new user will receive a Concur generated email providing link to setup the new account (link expires in 24 hrs)
- User/traveler must setup password and complete traveler profile

How to Get Setup as Travel Arranger

- Special access required to book student/guest travel
- Complete training (AM685)
- Request special access to DTS inbox and provide training date (disbursements.travel@utsa.edu)

Resources

- UT Systemwide Contracted Travel Vendors

<https://www.utsa.edu/financialaffairs/services/disbursements-travel/travel/travel-vendors.html>

- Concur

<https://www.concursolutions.com/>

- Travel Reimbursement Guideline

<https://www.utsa.edu/financialaffairs/resources/financial-guidelines/0904.html>

- UTSA Travel Guidelines (Global Initiatives)

<https://www.utsa.edu/roadmap/operations-policies/travel-guidelines.html>

- On Call International

<https://www.oncallinternational.com/>

- CTP Covid-19 Travel Resource Page

<https://ctp-travel.com/coronavirus/>



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