Frequently Asked Questions on the New Travel Policy

Airfare Booking – Section 2.2

- All employees must book their airfare through Carlson Wagonlit Travel (CWT) or our online booking tool Concur.
- Students must book their airfare through Carlson Wagonlit Travel (CWT), our online booking tool Concur or through Travel Cuts.
- Direct airfare bookings can be made when traveling to remote areas within a foreign country not available through Concur or CWT. The UofM issued T & E card or cash may be used in these cases.

FAQ

Q. What is the advantage of booking through CWT and/or Concur?

A. There a number of advantages, but here are the main ones compared to travelers booking on their own:

- The UofM has negotiated vendor discounts, such as 10% off WestJet, 2% off Delta, and a range of discounts off of AirCanada flights (5% within Canada, 10% to USA, 11% to Asia and India, 2% other international) which would not be possible if each person booked on their own. These discounts are passed directly to the operating or research grant. In fact, one staff benefit of working at the UofM is if you want to book personal or family vacation with CWT, you can take advantage of these vendor discounts as well using your UofM employee ID at your time of purchase.
- Airfare cancellation credits with vendors such as WestJet can easily be transferred to other employees.
- In cases of emergencies, such as wars, natural disasters, etc. there are mechanisms in place which allow the travel agency to let us know if we have any travelers in danger zones.
- About half of all University travel is related to research, and the largest source of research funding is the Canadian government through the Tri-Agencies. The Tri-Agency Financial Administration Guide has been used as the standard for air travel expenses, “Air travel must be claimed at the lowest rate available, not to exceed full economy fare.” The data capturing capability of the online booking tool and travel agency allows us to report to our granting agencies what flight was booked compared to what was available.
Q. What if I find a better deal elsewhere?

A. The UofM is committed to spending public funds in a prudent manner and wants to seek out the best deal for airfare. This is why we have the vendor relationships in place that we do.

For online bookings, Concur pulls from the same database of flights and pricing information as other online competitors such as Expedia and Orbitz. If you are not getting the lowest airfare, try expanding the scheduled departure or arrival in your search parameters.

For agency bookings, CWT has a price matching guarantee. If you find a lower price from a reputable site (good example would be Expedia, bad example would be Kayak), feel free to send them the quote for them to compare and match the price.

If you are not able to come to a resolution, and need to book outside of Concur or CWT, approval in writing will need to be obtained from a Vice-President prior to booking and provided to Travel Services.

Class of Airfare – 2.2.2

- Airfare selected must be lowest cost available, not to exceed full economy class.
- Scheduling and routing preferences can be used to justify airfare up to the greater of $100 or 10% above lowest cost available.
- Exceptions under 2.1.2 must be made in writing and provided to Travel Services before the airfare is booked.

FAQ

Q. What does “lowest cost available, not to exceed full economy class” mean?

A. This language is based on expectations of our funders including the federal granting councils. On Air Canada for example, airfare would usually be restricted to Tango for lowest cost. If all Tango flights are sold out, then Flex fare is acceptable. Latitude, and Business class are non-permissible options however as they are designated as a higher class then “full economy”.

In the example below, the third flight is the lowest cost and should normally be chosen. However, if scheduling requirements dictate an earlier return, the first or second flights may be chosen as they are within the 10% or $100 threshold allowed for scheduling and route preference modifications.
Q. Am I expected to wake up at 4am, or travel the day before in order to fly on the cheapest airfare given the 10% or $100 restriction?

A. Travelers or their administrative assistants, when searching for a flight using Concur, enter the time parameters available to them into the booking tool. Often they will use +/- 3 hours which is the default window established within Concur, however, individual travelers can broaden or reduce this window depending on circumstances. The $100/10% thresholds are not based on forcing travelers to leave work early or travel at inconvenient times.

The wording that has been approved for this policy is consistent with wording used by major funders and is intended to help us remain compliant with their expectations.

We have also found that the vast majority of travelers already book travel at lowest cost or within the $100/10% round-trip window, so for most this new policy will have no impact. The policy has been made more explicit to provide better guidance and allow for more consistent treatment of travelers. Although an exception process is available, this is a more difficult process intentionally to discourage expensive choices. The policy was designed to help constrain spending during a time when budgets are being reduced and public scrutiny of University travel expenses is being increased.

Q. What is the per-diem allowance?

<table>
<thead>
<tr>
<th></th>
<th>Breakfast</th>
<th>Lunch</th>
<th>Supper</th>
</tr>
</thead>
<tbody>
<tr>
<td>In Canada $50</td>
<td>$10</td>
<td>$15</td>
<td>$25</td>
</tr>
<tr>
<td>Foreign $60</td>
<td>$15</td>
<td>$15</td>
<td>$30</td>
</tr>
</tbody>
</table>
Q. If I have meal receipts while travelling (outside of Winnipeg), how much can be claimed?

A.

Daily limit for actual costs of meals

<table>
<thead>
<tr>
<th></th>
<th>In Canada $50</th>
<th>Foreign $60</th>
</tr>
</thead>
</table>

- One-over-one supervisors may approve up to $25 more than the receipted daily amount.
- Deans, or Associate Vice-Presidents may approve up to $50 more than the receipted daily amount.
- The President and the Vice-Presidents may approve amounts above these limits.

Please note that any alcohol costs would be included in the limits and must be separated from the meal cost and coded to the 713314 account code. Any non-allowable alcohol costs must be marked as a personal expense (ie, such as those on a grant) and not be reimbursed.

Q. How much am I allowed to spend on taking someone out to dinner? (referred to in the policy as hospitality or staff events)

A. In order to incur meal hospitality expenses, the following conditions must exist:

- The meal must be an approved business expense
- It must be approved by the one-over-one approval authority at the level of Dean, Associate Vice-President, Vice-Provost, Vice-President, or President;
- Costs must be reasonable in the circumstances; and
- The claim only includes those participants directly relevant to the circumstance (list of attendees must be included).

<table>
<thead>
<tr>
<th>Per person total costs</th>
<th>Dean or Associate Vice-President may approve up to:</th>
<th>Vice-President or President may approve up to:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meal maximum</td>
<td>$40</td>
<td>$65</td>
</tr>
<tr>
<td>Full day event maximum</td>
<td>$75</td>
<td>$100</td>
</tr>
</tbody>
</table>
Please note that all hospitality meal costs must be coded to the 713313 account code. Any alcohol costs would be included in the limits and must be separated from the other hospitality costs and coded to the 713314 account code.

Q. I normally work at the Fort Garry Campus, but have a meeting at the Bannatyne Campus today. If I leave from home, go to my meeting, and drive back home, can I claim these kilometers driven for reimbursement?

A. No, only incremental kilometers driven above the distance from residence to the normal work location may be claimed.

Q. I found a receipt from two years ago that I forgot to claim. Can I submit it for reimbursement?

A. No. Expenses submitted more than one year past the receipt date will not be reimbursed. Expenses submitted outside the fiscal year in which they occurred may be denied, so it is important to make sure that expenses are submitted in a timely manner.

Q. I have difficulty with Concur, where can I get help?

A. Call the Aurora Finance help desk at 204-480-1001 or send them an email at travinfo@umanitoba.ca

Q. If I have a question about the policy, who should I speak to?

A. First speak to your Dean’s office or Business office. If they do not know the answer to your question, they can call Travel Services for clarification on the policy.