

## **Travel Guidelines for Supervisors**

### **School of Education - Education Academic Services - UW-Madison**

- The School of Education provides university vehicles for supervision travel or reimburses supervisors for use of their own cars.
- In limited situations we will also reimburse for meals. Occasionally, we will reimburse for lodging.
- Because we are a public institution, there are very specific procedures and rules for doing all the above.
- Caitlin Flannery, [cflannery@wisc.edu](mailto:cflannery@wisc.edu), 262-1652, processes travel reimbursement requests for supervisory travel and answers questions about this.
- Look at our website for information: <http://www.education.wisc.edu/eas/universitystaff/>.

### **Using a Fleet Car to Travel to Your Supervisory Sites**

#### **Getting Authorized to Drive a University Vehicle**

All supervisors must be approved and authorized by the campus Office of Risk Management before driving a State vehicle. Please note the following important points:

- Prospective drivers must obtain a “Driver Authorization Form” from the Risk Management website ([http://www.bussvc.wisc.edu/risk\\_mgmt/risk\\_mgmt\\_forms.html](http://www.bussvc.wisc.edu/risk_mgmt/risk_mgmt_forms.html)) or the Risk Management Office. Graduate students use the “Student or Volunteer Driver Authorization” form; faculty and staff use the “Faculty and Staff Vehicle Use Agreement” form.
- Complete the form, obtain signature of your direct supervisor and Associate Dean Jeff Hamm, and return it to Risk Management, 21 N. Park St. Suite 6101.
- Individuals holding an out-of-state driver’s license, and individuals having a Wisconsin driver’s license for less than three years (due to previously being licensed in another state/country) must also complete, have notarized, and submit a special form, “Notarized Statement of Driving Record.” Obtain this form from the web at [http://www.bussvc.wisc.edu/risk\\_mgmt/risk\\_mgmt\\_forms.html](http://www.bussvc.wisc.edu/risk_mgmt/risk_mgmt_forms.html).

Drivers must be authorized before a car can be reserved. Faculty and staff will not normally have an expiration date. LTEs are approved for a maximum of 2 years at a time; drivers are responsible for insuring that their authorization is current. Risk Management requires **ten working days** to process authorizations.

#### **Reserving a University Vehicle**

All fleet car requests must be made through Caitlin Flannery, [cflannery@wisc.edu](mailto:cflannery@wisc.edu), 262-1652, EAS’s travel coordinator. Provide your name, driver license number, number of occupants, the date(s) of trips, times of pick up and return, and destination(s). Do not contact the fleet car office directly; cars must be reserved by EAS staff.

Request to reserve a car as far in advance as possible. If you know your supervision schedule for the entire semester, you may submit all requests at once via email or paper. **Allow at least one week’s processing time before your first reservation.** If you have left a voice mail or e-mail reservation and do not receive a confirmation within 24 hours, check back to be sure that your message was received and processed.

Inform EAS of all changes in fleet car plans. We are assessed a daily charge for all reserved vehicles not cancelled prior to **noon the day before the scheduled pick up**. Please call Caitlin Flannery, [cflannery@wisc.edu](mailto:cflannery@wisc.edu), 262-1652, if your plans change, and we will cancel the reservation.

## **Picking Up a University Vehicle**

During office hours, 6:00 a.m. - 3:30 p.m. weekdays, excluding holidays: Pick up keys at 27 North Charter St., Room 110. The vehicles are located in nearby Lot 50 (formerly Lot 51) between Mills and Charter Streets, just north of Regent St., behind the McDonald's restaurant at the corner of Mills and Regent.

Outside office hours and on weekends and holidays, visit the UW Police Office at 1429 Monroe St. and see the dispatcher. Ask for a fleet car key and tell the dispatcher the driver name and/or reservation number. Then go to Lot 50 per above.

## **Using Your Own Car to Travel to Your Supervisory Sites**

Supervisors who elect to use their own vehicles are currently reimbursed at 32 cents per mile. Supervisors who reserve a fleet car but must use their personal cars because no fleet car is available are reimbursed at 42.5 cents per mile. See the EAS mileage chart on our website (<http://www.education.wisc.edu/eas/universitystaff/Mileagechart.asp>), which shows one-way mileage from campus to specific schools or towns. If you are traveling between your home and the school site, monitor and report your odometer mileage. **Note that you will be reimbursed for the lesser amount of the home-school mileage or the campus-school mileage.** If two trips are taken consecutively – e.g., leave campus at 8:00 a.m. to Madison East High School, leave East HS at 10:00 a.m. for Oregon, return to campus at 1:00 p.m. – monitor your odometer and report the mileage. Without odometer readings we will reimburse per mileage chart.

Required: When listing mileage for school sites, list both the School and the City. When listing mileage for all non-school sites, list the Site name and the complete address (Street address, City, State and Zip, e.g., WI Div. of Voc Rehab, 1819 Aberg Ave., Madison (04)).

EAS will not reimburse travel expenses for field trips, conferences, or other non-supervisory travel. Check with your department for possible travel reimbursement.

## **Getting Reimbursed for Meals and Lodging**

Meal reimbursement is not common and is based on distance and time of travel. Trips must be at least 15 miles from Madison for meal reimbursement. To receive breakfast reimbursement, the traveler must leave before 6:00 a.m. Lunch requires that the trip begin before 10:30 a.m. and end after 2:30 p.m. Dinner reimbursement requires a return after 7:00 p.m.

Overnight lodging for supervisors is considered quite unusual. Requests for lodging reimbursement must be made in advance to Associate Dean Jeff Hamm. Original, paid receipts are required for all lodging claims.

See this site for both meal and lodging reimbursement rates: <http://www.bussvc.wisc.edu/acct/travel>.

## **Processing the Travel Worksheet for Reimbursement**

To be reimbursed for any travel expenses, you must complete and submit a travel worksheet to Caitlin Flannery, 116 Rust-Schreiner Building. You must list your name on the worksheet as it appears in *University payroll records*. In most cases, this includes official first name (no nicknames), middle initial, and last name. Find blank worksheets and a completed sample on the EAS web site:

<http://www.education.wisc.edu/eas/universitystaff/>.

So we can monitor costs more effectively, please submit travel worksheet forms **monthly**. However, if a monthly reimbursement request totals less than \$15, we will hold it until subsequent worksheets bring the total to at least \$15.

Please note that processing a reimbursement request includes several steps:

- (1) The travel coordinator reviews submitted worksheets and completes an official travel expense report.
- (2) The travel coordinator sends the official travel expense report form, with the original worksheet attached, to you for your signature. Please return the original signed form and the original worksheet to us as quickly as possible so processing can be completed. You should keep the included copy for your files.
- (3) The original signed form is reviewed and signed by Jeff Hamm.
- (4) The form then goes for review and signature to the School of Education Business Office and to the campus Business Services office.
- (5) A check is issued and mailed to you.

### **Important deadlines**

Given the time-consuming reimbursement process and campus deadlines, end-of-the-school-year reimbursement requests must be received by Caitlin Flannery, no later than June 1 to insure payment. Requests submitted after December 1 will likely not be processed until late January.

**Please note that all rates and regulations are subject to change without notice. All travel claims will be reimbursed in accordance with the latest State of Wisconsin travel regulations.**

If you have questions, please review the campus travel web site: <http://www.bussvc.wisc.edu/acct/travel> or these materials. If your questions persist, call Caitlin Flannery at 262-1652.