



TRAVEL • PURCHASING • PROPERTY CONTROL

AUG/SEPT 2023

Welcome to the Travel/Purchasing/Property Control Bulletin!
We will highlight current events, answer some frequently asked questions, and review UW Policies.

TRAVEL

Did You Know?

A Trip Request Form or TRF (formerly known as the 'pink sheet') is required and must be approved for every trip **prior to** making any travel arrangements or incurring any expenses. The approval process ensures that the traveler has appropriate funding budgeted and available to cover the trip. Please submit the TRF to the travel@ssec.wisc.edu email as soon as possible as we deal with a large volume of requests, and approvals may take 7 – 10 days. Even if there's a chance the exact travel dates may change slightly, it's better to plan ahead and ensure the funding is approved – we can make some adjustments to the actual travel dates, if needed. The TRF can be found on the SSEC employee groups page at <https://groups.ssec.wisc.edu/employee-info>.



Policy Updates

- **Air Travel Cost Comparison** – this section of the Air Travel policy [UW-3016 Air Travel](#) has been updated to include the 80% rule and detailed requirements regarding cost comparisons. Travelers must obtain a cost comparison under the following circumstances:
 - A. Indirect routing or extra stops for personal reasons.
 - B. Travel prior to or after the required business travel dates.
 - C. Using transportation methods that are not the most efficient or cost-effective (i.e., electing to drive/take a train versus fly when flying would be the most efficient and cost-effective option).
 - D. Departing from/returning to an alternate city (not near campus/headquarter city) for personal reasons.
 - E. Any other situation where the traveler's itinerary is modified for personal reasons.

Either the traveler's actual flight or their comparison flight - **whichever is less expensive** - is payable/reimbursable. The University will not pay/reimburse excess costs related to personal travel. Cost comparisons are not required for non-employees.

Acceptable cost comparisons include Concur screenshots or designated agency documentation (such as emailed quotes) and must be done at the time of booking to be valid. Airfare payments or reimbursement claims submitted without a valid cost comparison will be paid or reimbursed at a flat rate of 80% of the total cost of the fare, no exceptions.

- **Vehicle Use/Rental** - Cost comparison language for mileage has been updated to reflect 1000 miles as the distance at which a cost comparison is required. [UW-3019 Vehicle Use/Rental](#)

PURCHASING

UW Policy Highlights

The best judgement threshold for purchases is \$5000. This means that any purchase over this amount needs to be processed through UW Purchasing, and if it's not being done through a ShopUW+ punchout vendor or a contract vendor requires some extra steps. Depending on the total cost of the order it will need to be done through a Simplified Bid, Non-Competitive Purchase (sole source), Waiver, or Sealed Bid. Please contact Melissa Steidl in the SSEC Purchasing office to get started with these purchases.

Even if your purchase is under the \$5000 threshold, no one should make commitments to vendors or secure goods/services without first ensuring that a mandatory contract does not exist for that category, and that the vendor is not on a State of Wisconsin Ineligible Vendor List. Please reach out to our purchasing office as we are happy to help you with this!

Helpful Hints:

Last summer we updated the SSEC Purchase Request form to simplify it and remove many areas that requestors did not need to complete. We also added spaces for the Business Purpose. All areas highlighted in yellow contain information that is needed to complete and enter a purchase. The updated form is attached to the email accompanying this bulletin and will be added to the employee groups page.



INVENTORY/PROPERTY CONTROL

UW Policy Highlights

At SSEC we use two types of inventory tracking:

1. We internally track all assets with a purchase value of \$500 or more, with the exception of component parts that are tracked as part of the larger asset. These items will all get one of our internal SSEC inventory stickers (**example 1.**)
2. Capital Equipment assets with a purchase value of \$5000 or more are also tracked at a campus level. This can be an individual item or a fabricated asset. These items will also get a capital equipment asset tag with either a U or F asset number based on whether it is University or Federally owned (**examples 2 and 3.**) There are additional tracking and audit responsibilities required of all capital equipment based on federal, state, UW, and sponsor policies.



Example 1



Example 2



Example 3

****Please let us know if there are specific topics or questions you would like to see addressed in future issues!****