

WebTravel Reference Guide

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WebTravel (CABS) – Students and Guests Only

Central Airfare Billing System (CABS) requests are processed within the WebTravel system. WebTravel is an electronic solution for departments to submit for approval and generate payment for affiliates: Registrations, Travel Cash Advances, Travel Cash Advance Reconciliations, and Travel Reimbursements. WebTravel is for **student and guest travel only**.

- See [Concur](#) for faculty and staff travel.

Resources

Policies and Procedures

- [Business Travel](#) (1501) *applies to guest travel*
 - [Procedure on Pre-Travel Authorization](#) (1501.1)
 - [Procedure on Travel Advances](#) (1501.2)
 - [Procedure on Air Travel](#) (1501.3)
 - [Procedure on Ground Transportation Expenses Including Mileage Rates](#) (1501.4)
 - [Procedure on Per Diem Rates](#) (1501.5)
 - [Procedure on Lodging Accommodations](#) (1501.6)
 - [Procedure on Travel Expenses and Reimbursement](#) (1501.7)
- [International Travel](#) & [UNC Gillings International Travel Approval Process](#) *requires pre-approval*
 - [Policy on Insurance for Study and Travel Abroad](#)
 - [Procedure for Acquiring Insurance for Study and Travel Abroad](#)
- [Policy on Export Controls](#)
- [University-Related Business Entertainment Expenses Policy](#) (1263)
- [Expense Reimbursements](#)

Forms

- [Graduate Student Travel Restriction Exception: Advisor Approval](#)
- [Student Travel P-Card Pre-Approval Request Form](#) (1252.2.1f)
- [Student Travel T&E Card Pre-Approval Request Form](#) (1505.2.1f)
- [Guest Travel P-Card Pre-Approval Request Form](#) (1252.2.2f)
- [Domestic Vendors](#) *guests must be set up as a vendor to book travel/receive reimbursement*
- [Missing Receipt Affidavit Form](#) (1252.3.1f)
- [Group Travel Request Form](#) (1501.6.2f)

- [Non-Hotel Lodging Authorization Request](#) (1501.6.1f)
- [Excess Lodging Justification](#) (1501.6.3f)

Travel Tools

- [WebTravel Manual](#)
- CBT: [WebTravel for Travel Administrators](#)
- [World Travel, Inc \(WTI\) Contact Info](#)
- [UNC Travel & Expenses page](#)
- [SPH Global Travel Toolkit](#)
- [Business Travel FAQs](#)
- [Traveler Responsibilities, Travel Guide, and Travel Checklist](#)
- [Paying for Travel Expenses by Traveler Type](#)
- [Travel Allowances, Mileage and Per Diem Rates](#)
- [Currency Converter](#) (OANDA)

Traveler Processes

The Basics

- Plan as far in advance as possible.
- Review the [Travel and Expenses](#) and/or [International Travel](#) pages to understand University policies and procedures.
- Gillings has an [International Travel Approval Process](#) that corresponds with your position, you must receive travel approval prior to purchasing your ticket.
- When traveling abroad, please review the [UNC Global's Preparing for International Travel page](#) and enroll in the [Travel and Study Abroad Insurance Program](#).
 - If traveler is hand carrying or shipping out of the country any research equipment, biological material or non-biological scientific samples, see [Policy on Export Controls](#) before proceeding.
- UNC can pay for student airfare, registration, and hotel directly if the travel is for the University's benefit.
- UNC can pay for guest airfare and hotel directly if the travel is for the University's benefit.
- Students may request a travel advance (loan given before the trip). Students can request money for meals, transportation, and lodging if the trip is for out-of-country travel (note: lodging can be booked with a [P-Card or T&E card](#)). You do not have to provide an exact amount, just estimates.
- Transportation by commercial airlines is limited to main cabin seating.
- Travelers who have an approved medical accommodation from the Equal Opportunity and Compliance (EOC) Office may be eligible to upgrade their flights as outlined on their accommodation notice. Questions regarding the accommodation process may be sent to accommodations@unc.edu.

- Retain all expense receipts for reimbursement. Note: credit card statements will be rejected.
- You have **30 days** from the end of your trip to request reimbursement.

Pre-Travel: Students

- Obtain written pre-authorization (which includes the chartfield string) from the PI / Department / Unit in advance of booking travel.
 - Please note that if you are travelling on federal grant funds, a flight must be booked in compliance with the [Fly America Act](#).
- If you are thinking about driving vs. flying, please price out driving via personal car, renting a car and flying to determine what makes the most sense from a time and cost perspective.
- If you plan to use [Third-Party Lodging](#) (e.g., Airbnb, VRBO, etc.) you must complete [form 1501.6.1f – Non-Hotel Lodging Authorization Request](#).
- Students must be set up as a supplier in ConnectCarolina before using any functions of the WebTravel system, receiving reimbursements, and other payments initiated by a campus voucher. Students will need to complete the [Direct Deposit Authorization \(form 1218.1.2f\)](#).
- Work with department/unit business office to book travel and/or procure a travel advance.
 - Most units/departments have a travel request form for you to complete. Check out the SPH Finance [CABS Travel Request Form](#).

Pre-Travel: Guests

- Guests should work with the hosting school/unit on questions (e.g., booking process, what expenses will be reimbursed, family travel, etc.)
- To be reimbursed for travel expenses, a guest must be set up as a [Domestic Vendor](#), which requires a [W-9 form](#) and a [Direct Deposit Form](#). For international guests or for assistance with creating a domestic vendor, contact your unit/department business office.
- Once a guest is set up as a vendor, flights can be booked via [Central Airfare Billing System](#) (CABS).
- Direct billing is preferred for hotels (unit/department sets up the relationship with the hotel, invoice is then sent via CBM).
- Departments / Units should work with the business office to book travel.

Post-Travel: Students

Students have **30 days** from the end of the trip to request reimbursement. All receipts should have your name and show that the bill has been paid. A credit card or bank statement by itself is not sufficient documentation for anything other than exchange rates.

- If you received money before the trip (travel advance), you must provide documentation (lodging, transportation, etc.) for all the money you received.
 - If you spent more than you received, you will be paid the difference.
 - If you spent less than you received, you will need to pay back the difference by writing a check to UNC and giving it to your travel contact. Wait until they tell you the amount.

Post-Travel: Guests

Guests have **30 days** from the end of the trip to request reimbursement.

Reimbursement Documents

Ground Transportation

- If you drove your personal car, provide the origin, destination, and mileage of each leg of the trip. Include a screen shot of the map (mileage verification).
- For taxis or rideshares, list the origin and destination of each trip, include receipts (write the tip on the receipt if it's not already included).
- For rental cars, provide the rental receipts, any gas receipts you paid for, and a justification for renting a car rather than using public transportation or taxis.

Lodging

A booking or reservation is not a valid receipt. The hotel receipt should have your name as the occupant and list out the charges. Note that if you are using federal per diem rates, you cannot be reimbursed more than the federal room rate.

- If you used Third-Party Lodging (e.g., Airbnb, VRBO, etc.) include the [Non-Hotel Lodging Authorization Request](#) (1501.6.1f).
- If the lodging was paid by department P-Card / T&E card, make a note in the notepad indicating where the student stayed.

Meals

Meals are reimbursed at a fixed rate called per diem. For domestic travel, list each date and which meals out of breakfast, lunch, and dinner you are claiming on that date. Do not claim any meals that were provided by the hotel, the conference, or a host organization. For international travel, include the city and country you were in on each date. No receipts are necessary unless the sponsor itself requires them. For a more in-depth explanation, see [Travel Allowances, Mileage and Per Diem Rates](#).

Medical

If you are traveling internationally, you may be reimbursed for necessary vaccinations and prescriptions (such as antimalarial drugs). Provide receipts.

Other

Baggage fees, internet access, laundry (only for long international trips), parking, phone calls, phone cards (international only), poster printing, and other miscellaneous expenses must be accompanied by receipts. Tips to airport employees are reimbursable at \$2 a bag; no receipts are required.

Passport/Visa fees

Provide receipts as best you can. This may include photo fees, mailing/shipping fees, etc.

Registration/Abstract submission

Most conferences send email confirmations when you pay. You can print those to PDF to submit as receipts.

Missing Receipt Affidavit

Lost receipts can only be reimbursed by submitting a [missing receipt affidavit](#). A missing receipt affidavit will not be accepted for airfare, lodging, conference registrations, or rental cars.

- Cannot use missing receipt for airfare, hotel, conference registration, or car rental.
- If under \$20, you do not need to submit missing receipt affidavit.

Business Office Processes

Student and guest travel requests and expense reimbursement requests are submitted via the Central Airfare Booking System (CABS) within the WebTravel system. Before submitting a travel request, ensure that you have the proper approvals, [forms](#), and chartfield information.

- See [Concur](#) for faculty and staff travel.

WebTravel Guide – Helpful Resources

- Pg. 3 – Signing In
- Pg. 12 – Creating a Travel Authorization
- Pg. 7 – Creating an Airfare Request
- Pg. 18 – Creating a Travel Reimbursement
- Pg. 23 – Attaching Files and Submitting WebTravel Documents for Approval
- Pg. 26 – Checking the Status of a WebTravel Document
- Pg. 34 – Creating a Favorite Chartfield String(s)
- Pg. 37 – Using the Travel Reports Tab

PID/VID Verification

Sign into WebTravel (via ConnectCarolina) and follow the steps outlined in pgs. 3-5 of the [WebTravel Guide](#) to verify that the student or guest has been set up in the system. If the student/guest is not set up in the system, you will receive a red error message advising that the PID/VID is valid, but the person is not a vendor – follow the [supplier/vendor creation](#) steps below.

The screenshot shows the 'ConnectCarolina Web Travel' interface. At the top, it indicates the user is signed in as 'angiej19' and provides a 'Sign-out' link. The main header identifies the user as 'THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL'. Below this, there are links for 'Inbox', 'Help', and 'Exit'. The main section is titled 'Enter Traveler's Information:' and displays a red error message: 'The PID you have entered 730369695 is valid but the person is not a vendor in Business Unit UNCCH. Please submit a Campus Vendor request to add the traveler as a vendor. Please also note that ACH information is required for UNC employees when requesting a travel reimbursement. For additional assistance, please contact the Vendor Coordinator at vendor_coordinator@unc.edu.' Below the error message, there is a 'Business Unit' dropdown menu set to 'UNCCH'. There are two search fields: 'PID: 730369695' with a 'Search' button, and 'VID: ' with a 'Search' button. Below these fields is a 'Verify Traveler Information:' section showing the following details: Name: Angela Ross; Address: Traveler's Address is not Public; Email: angela.ross@unc.edu; Department/ Classification: 460105(SPH - Finance) Business Services Coor.

Supplier/Vendor Creation

- Students must be set up as a supplier in ConnectCarolina – see pg. 14 in the Requesting Suppliers & Independent Contractors Guide: [Requesting a New Campus Supplier](#).
 - If you do not have access to Create a Campus Supplier in Connect Carolina, email vendor_coordinator@unc.edu a request to add the student (include student name and PID).
- A guest must be set up as a Domestic Vendor, which requires a W-9 form. Once the guest is set up as a vendor, they will be assigned a VID. Follow the [Domestic Vendor process](#).

Travel Advance

Travel advances are considered loans to the traveler. Undergraduate students are eligible to request travel advances for domestic and international travel. Travel advances are available to Graduate students ONLY for foreign travel unless an exception is granted.

- The Travel Authorization is completed PRIOR to the traveler departing for his/her trip. Follow the steps beginning on pg. 12 of the [WebTravel Guide](#) to submit a travel advance request.
- Attach a copy of the [Travel Exception Approval](#) (email generated by Global Travel via RASR) or the request will be rejected by travel.
 - NOTE: **Travel advances are paid via check**, which is mailed to the traveler's home address. If you want the check held so you can pick it up, you must indicate it in the notepad section of the report (the check will be held at the Finance and Business Office, suite 3500 in the AOB building; 104 Airport Drive, Chapel Hill).

Registration

Conference registration can be charged to the departmental [P-Card](#).

- Optional activities not included in conference registration are not reimbursable.

Creating an Airfare Request

Log into [WebTravel](#) via [ConnectCarolina](#). Follow the [WebTravel Guide](#) to create an airfare request – see pg. 7. Once you save and submit for approval, you will email the [World Travel, Inc \(WTI\)](#) team the C# and travel details. WTI will enter the airfare request (from their end), complete ticketing, and email you and the traveler the confirmation. The chartfield will be billed through WebTravel.

- See pgs. 9-11 of the [WebTravel Guide](#) when entering the Chartfield string.
 - Note: When using contracts and grant funding (project ID#) the PC Business Unit (CHOSR) and PC Activity ID (1) will be required fields.

Details to include in the email to: uncch_travel@worldtravelinc.com

- Airfare request number C# (Cxxxxxx)
- Department ID # (from the chartfield)
- Flight details (airline, flight number, departure date, departure time, departure airport, destination airport, arrival time)
- Traveler's Name (as listed on license/passport)
- Traveler's email
- Traveler's cellphone
- PID/MID
- DOB
- Frequent Flyer # / Known Traveler Number (KTN)
- If international travel, include a copy of the passport

Booking Lodging

Prior to booking the lodging, verify the rate is within the per-diem guidelines ([policy 1501.6](#)) – there are three per diem rates which are based on travel location (e.g., [Continental US](#) or [HI, AK, US Territories & Possessions](#) or [International](#)). If Third-Party Lodging (e.g., Airbnb, VRBO, etc.) include the [Non-Hotel Lodging Authorization Request](#) (1501.6.1f).

- Travelers should secure lodging no more than 50% higher than the lodging rate set for their destination and dates of travel. Lodging rates only apply to the nightly room rate charged by the lodging establishment and do not include taxes and fees.

Student lodging may be paid for on a T&E Card (if traveling with an Accountholder), on a [P-Card](#) with prior approval, or with a personal credit card.

- [Student Travel P-Card Pre-Approval Request Form](#) (1252.2.1f)
- [Student Travel T&E Card Pre-Approval Request Form](#) (1505.2.1f)

Direct billing (the University has established relationships with several local hotels) is preferred for guest travel – call the hotel and request direct billing. Hotels can be charged to the [P-Card](#).

- [Guest Travel P-Card Pre-Approval Request Form](#) (1252.2.2f)

Submitting Reimbursements

Follow unit/department guidelines and submit reimbursements within 30 days of student/guest completing the trip.

- Follow the steps beginning on pg. 18 of the [WebTravel Guide](#) to submit a reimbursement request for a **student**.
- Follow the steps beginning on pg. 6 of the [Creating Campus Vouchers Guide](#) to submit a reimbursement request for a **guest**.
 - Naming convention is important, see “Reimbursements” section of the [Naming Conventions for Vouchers without Unique Invoice Numbers](#).

Need Help?

World Travel, Inc. (WTI) has been selected as the University's Authorized Travel Agency for all University Travel (excluding Athletics).

- e) uncch_travel@worldtravelinc.com
- p) 877-602-4950
- w) [World Travel, Inc](#)