



# **4 STEPS TO A SUCCESSFUL RETURN TO TRAVEL**

A Practical Guide





## Policy Pop Up



Creating short term policy changes as you phase in a return to travel.

[View More >](#)



## Traveler Readiness



Traveler assistance before and during their trip.

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## Spend Recovery



Tools and recommendations to help you prioritize your unused travel spend.

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## Safety and Security



Risk management best practices and traveler tracking tools.

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# 4 Steps to a Successful Return to Travel

A Practical Guide





# POLICY POP-UP

**CONSIDERATIONS FOR SHORT TERM  
POLICY CHANGES AS YOU COMMENCE  
YOUR RETURN TO TRAVEL**



## POLICY POP-UP

### Aligning with Executive Management & Key Stakeholders

Your return to travel program should be based upon **traveler health and safety, business essentials and growth requirements**. Ensure alignment with key stakeholders from each department within the company, and backed by Executive approval.

### Outline Risk Management Guidelines for Travelers

As with all guidelines and areas to reduce any company liability, it is imperative to **review recommendations** with your HR, Risk Management, and/or Legal teams.



#### TI TOOLKIT

[Download Practical Guide - Policy: Concur Messaging](#)

[Download Practical Guide - Policy: Adjustments](#)

### Air Travel vs. Ground Transportation

While many airline schedules remain limited, you may wish to recommend ground travel via personal car and rental car based upon the distance.



**Day trips under 80 miles** may be most economical for your employees to utilize their personal vehicles. This reduces the interaction with other individuals, and is more cost effective than renting a car for a single day.



**Multi-day trips, or trips over 80 miles** will be more economical to utilize your preferred car rental companies. It is important to reconfirm with the location their hours of operation and new specifications for car pickup and delivery.

## Shifting from Essential to Permissible Travel

### How do you determine what should be permissible travel?

Each company will determine what is considered permissible travel. Most of our clients are commencing domestic travel as long as the trip is considered necessary to sustain and/or grow the business based upon:



**Company Objectives**



**Government Restrictions**



**Employee Acknowledgement**



**Expanding travel through a phased approach**

### Preferred Supplier Considerations

Each supplier has implemented their own hygiene protocol to ensure cleanliness and safety. While a previous supplier may have been considered preferred in the past, they may not currently meet your specific requirements for schedules and routes, cleanliness, and availability. **Communicate with each of your preferred vendors** to ensure the service you expect is what is being delivered. This could include:

#### Airline:

Cleaning standards, limiting seat capacity, pricing & route preferences

#### Hotel:

Cleaning standards, food availability, loyalty modifications, cancellation flexibility

#### Rental Car:

Cleaning standards, off airport location availability, loyalty



### Updating Approval Processes

Maintaining your unique company cultural is keenly important. Incorporating approval processes to your new travel policy should not deter from your culture, but be communicated as in the best interest of the traveler to ensure their health and safety.

#### Best Practices

- To properly manage and monitor your travelers, shift to a **managed approach** requiring all travel, including rental car and hotel, be booked either through your Concur travel platform or through a TI travel consultant
- Update your online booking tool to include **approval requirements**
- Consider including a **Trip Purpose** to assist with approval parameters
- Utilize the **Travel Class Rules Engine** to differentiate which traveler type requires approvals, and which may not (for example, VIP or greater do not require approval).
- Work with your Account Manager to review options available for the most **efficient and effective settings**.

### Pre-Trip Location Blocking

Most companies are currently blocking international travel due to European bans or further global entry limitations.

- Settings with your Concur Travel platform allow **blocking reservations to specific locations**.
- Should a traveler require traveling to an International location, suggest calling a **Travel Incorporated travel consultant** to assist in these bookings.

### Unused Ticket Management

TI provides two options for online tracking of unused tickets. You can opt to have each ticket set up for **automatic checking** for available credits as part of our quality control features, or you can have **each unused ticket credit listed** for the traveler to select when booking the trip.

## Traveler Communications

During the pandemic, changes to your policy are likely to occur more often, and require a higher degree of consistency in your traveler communications.

### Internal Travel Hub/Portal

As with all policy changes, traveler communication is extremely important. If you have an internal Travel Hub/Portal or intranet site, post updates with effective date notification indicating the most recent update to your policy.

### Mitigating Company Risk

You may wish to consider requiring an 'Acknowledgement and Acceptance of Understanding' be completed prior to travel either as an internal document that is managed by Human Resources, or a digital signature at the end of your policy documentation. This not only adds protection to your company, but provides the employee with the clear comfort that the instructions you provide are for their wellbeing as well as choice should they not wish to travel undercurrent circumstances.

### Post-Traveler Surveys

It is important that your travelers are comfortable during their journey and may have some ideas or tips to offer their colleagues for future travel. Frequently check in with various employees who travel to gain their feedback. This may impact future policy amendments as you continue to improve your overall travel program.



# MANAGING SPEND RECOVERY



# MANAGING SPEND RECOVERY

The travel restrictions over the past months have resulted in extensive ticket cancellations, refunds, fee waivers and applied credits.

As most refunds for airline imposed cancellations have been received, it is now important to gain a clear understanding of the remaining value of your unused tickets.

## Current Status of Prior Ticket Spend

### Status of Travel Spend

Easily review your prior ticket spend for all travel segments via the **Trip Detail Report**. This report will confirm the transaction status of all booked travel, whether it was a sale, refunded, voided or cancelled.

### Identify Available Tickets for Reissue

To see a current list of all air tickets available for reissue, you can run an **Open Ticket Report** and sort by either Issue Date or Expiration date. This report provides additional visibility including the amount available for exchange and if the ticket is associated with a currently profiled traveler.

## Airline Waivers

### Exchange Fee Waiver:

As the carriers work to reduce the burden on the business travel community, many carriers during the pandemic have waived ticket exchange fees, as well as extended the expiration date up to two years.

Travel Incorporated enhanced our reporting to include these extended expiration dates for your convenience and simple prioritization.

### Name Change Waivers:

Many companies have active tickets for prior employees or contractors which require a name change in order to reissue the ticket for a different traveler. Some airlines are offering name change waivers if you have a corporate agreement or small business account with that carrier.

### Best Practices:

- 1) Sort your Open Ticket report by carrier, then by profiled traveler.

- 2) Determine how many tickets will require a name change along with the amount available.
- 3) Review your list with your carrier to determine options for waivers, or if an equity card could be applied
- 4) If the ticket has been partially exchanged, it is not likely acceptable for name changes.

## Booking and Reissuing Tickets

Feel confident booking via SAP Concur for all Delta, United and American Airlines travel as the extended expiration date and fee waivers will be captured through our quality control automation at time of ticketing.

If you have a UATP or airline Equity card available, these can be added to your forms of payment to cover the cost of the reissued ticket.

For name changes, we suggest working with your Account Manager to create a list of inactive employees and their related active tickets to maintain for future call in booking requests.



## TI TOOLKIT

TI has provided step-by-step video tutorials to help access these reports.

[Watch the Open Ticket Report Video](#)

[Watch the Trip Detail Report Video](#)





# TRAVELER READINESS

**WHAT YOUR TRAVELERS NEED TO  
KNOW BEFORE & DURING THEIR TRIP**



### Recommended Packing List



#### Masks

Bring multiple masks to allow for potential loss, or two reusable masks that can be washed in the sink.



#### Personal Hand Sanitizer

TSA restrictions have increased the size of hand sanitizer for carry-on to 12 oz. All other liquids remain limited to 3.4 oz.



#### Sanitizing wipes

For your well-being, it is important to wipe down surfaces as needed when you are traveling.



#### Prescription Medication

In the event you are detained or become ill while traveling, pack two weeks' worth of any prescription medication in addition to the normal amount you pack for your trip.



#### Disposable Thermometer

Some airlines and other service providers may have limitations for access if you have a fever of 100.4 degrees or greater.

### Travel Policy Updates

Review all new policy changes and recommendations prior to booking your trip, as well as how to handle specific situations unique to COVID-19 while traveling.

### State & Government Entry Requirements

Make sure to check each of your destination state's requirements/ recommendations for entry. Many states are either suggesting, requiring protocols, or even quarantines if arriving from high risk locations.

Visit [CDC's Guide to State & Territorial Health Department Websites](#) for more information. For international travel, visit the [U.S. Department of State Website](#) for entry requirements.

### Airline Policies

Check with your airline to confirm if they have any carry-on limitations, require any medical release forms from a physician, or if a 'wellness affirmation' may be required upon check-in for a flight.

### Hotel & Rental Car Availability

Reconfirm with your hotel and rental car location their hours of operation as well as any specific check-in requirements that may be new based upon COVID-19.

### Emergency Contacts

#### Update Travel Profile

To ensure your safety and security, it is important to have your travel profile updated to include your mobile number.

#### Company Emergency Contacts

If your company is contracted with a medical and security provider, have their number stored in your phone. If you do not, have your direct manager and company HR professional contact details easily available.

### Travel Incorporated

For any travel changes or new booking requirements that require direct travel consultant support.



### TI TOOLKIT

[Download Traveler Readiness Infographic](#)





## Follow CDC Health & Safety Measures

Wash hands and/or use hand sanitizer frequently. Always maintain social distancing. It is highly recommended to wear masks anytime you are within 6 feet of another individual, and also to avoid hand shaking

## If You Get Sick While on the Road

If you are ill, follow your company's policy for emergency health service options.

If for any reason you are not allowed on the aircraft or hotel for medical reasons, contact your company medical provider or HR emergency contact to receive appropriate guidance and to make alternative arrangements.

## What To Expect at Airports & TSA Security Checks

**Arrive 2 hours prior** to departure to allow for terminal closures, and extended security lines.

**Eat before you travel** or bring food with you as airport restaurants are limited and many may not be open for business. Additionally, bring snacks on board, as airlines may be limiting what is available during your flight.

**Face Masks**  
Have your face mask and identification readily available.

**Carry-On**  
Place as many items in your carry-on as permissible to reduce time during TSA security, including keys, loose change, etc.

## Hotel Recommendations

**Cleaning Measures** - Familiarize yourself with the **cleaning measures** and tactics for your hotel. If you are not comfortable, or notice the property is **NOT** adhering to these standards, you do not have to stay at the property.

Document the issues and report to your travel manager. Rebook alternative accommodations

**Keyless entry** - If your property has a keyless entry, please utilize this service.

**Wipe down all surfaces with sanitizing wipes** - This includes remote controls, doorknobs, faucets, toilet handles and light switches.

**Avoid buffets** - We recommend "grab and go" breakfast services.

**Minimize interaction** with hotel staff and other guests, including avoiding sharing the elevator. Also, avoid using shared computer stations in the business center.

## Ground Transportation

### When Picking up Your Vehicle

Wipe down all handles, steering wheel and areas that you will touch while driving or riding if ride-share is permitted by travel policy.

### When Getting Gas

Wipe down handles and any buttons before you touch them.

## Restaurants

**Follow CDC respective risk levels** for dining out.

### Company Preference

Drive-thru, Delivery, Take-out and Curb-side pick up

### Moderate risk

Outdoor dining is okay as long as the restaurant is complying with CDC and government standards for social distancing and capacity

### Avoid

On-site indoor dining, especially when seating is not reduced to at least 6 feet apart.



# SAFETY & SECURITY





## Primary Objectives

### Traveler Care

- Maintaining the health and safety of your travelers
- Locating travelers today and where they plan to be in the upcoming days
- Make certain they are informed pre-trip Communication throughout the trip



**TI Technology is designed for Immediate Access to Traveler Locator and Communication Tools.**

### Risk Mitigation

#### Trip approval criteria

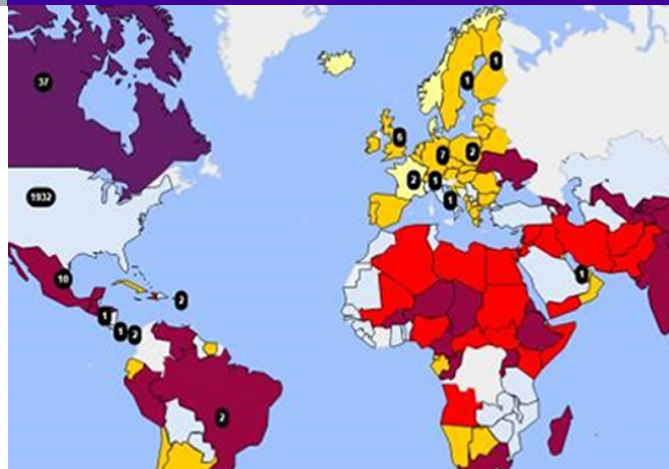
- Pre-trip flagging of high risk destinations
- Policy adjustments for safety guidelines

#### Wellness Programs:

- Providing health care support while on the journey
- Internal programs for mental health and positivity
- Third party medical and security service assistance

## Pre-Trip: Risk Mitigation WatchGuard

- Flags bookings made to your customized pre-determined high risk locations
- No limit to number of risk levels or locations to monitor
- Real time adjustments as needed
- Determination on risk tolerance for purpose of trip



WatchGuard Map Settings					
Alert Categories — Alert Categories are the company's area of focus & importance levels and used for assigning Target Locations					
#	Priority	Alert Name	Reason / Description	Map Color	Email
1.	1	5 - Extreme	Extreme	##0000	william.never@abccompany.
2.	2	4 - High	High	#990641	william.never@abccompany.
3.	3	3 - Medium	Medium	#DCE7F7	jane.doe@abccompany.com
4.	4	2 - Low	Low	#FFCC00	
5.	5	1 - Minor	Minor	#FFFF99	
Add Another Alert					
Target Locations — Choose a Target Location and assign it to an Alert Category					
Edit a Target Location			Locations — All defined Target Locations		
Alert Category Choose An Alert			5 - Extreme		
Country Assignment Choose A Country			Afghanistan, Algeria, Angola, Central African Republic, Colombia, Dem Republic of the Congo, Haiti, Iran, Iraq, Jordan, Kenya, Korea (North), Lebanon, Libya, Mali, Nigeria, Pakistan, Rwanda		

## Notification and Tracking TI Alerts

Travel disruption notifications

## People Track Assist (PTA)

Pushed notification of travelers impacted by TI Alert based upon ticketing data

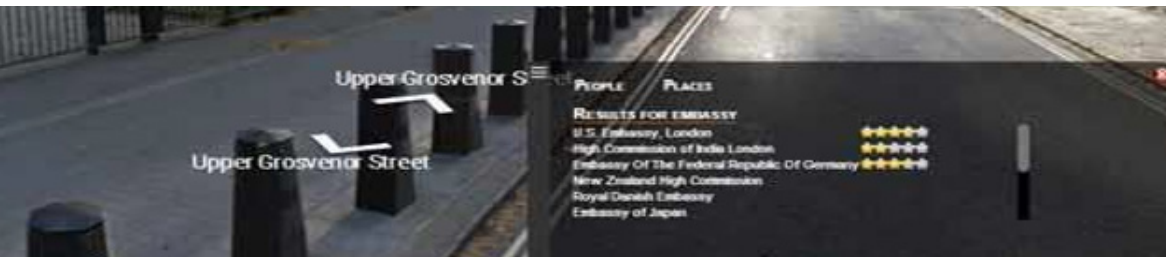
Includes TripLink bookings

Traveler tracking Air/Car/Hotel/Rail

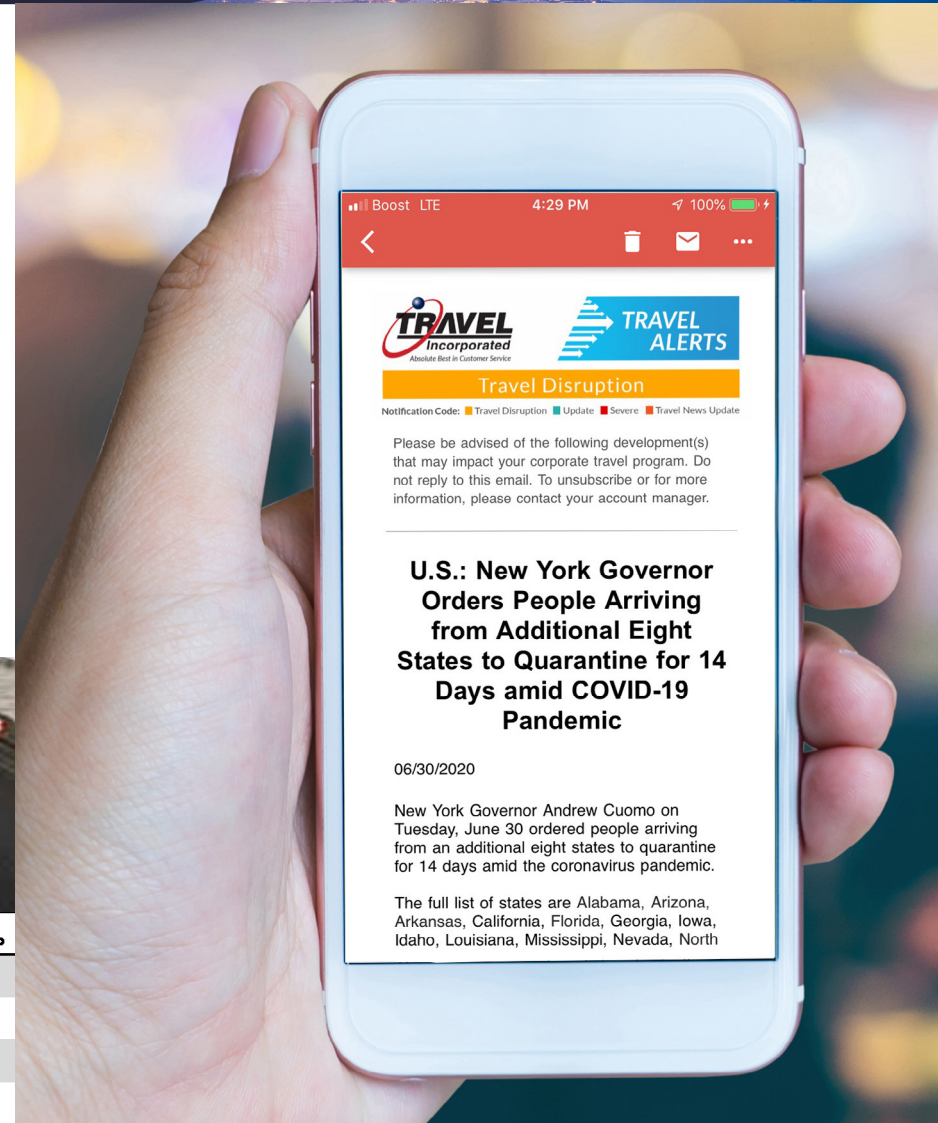
Filtered search options

Last known arrival destination on visual map

Communicate to travelers via SMS or email of essential nearby locations



Name	Departing	Departure City	Arriving	Arrival City	Vendor	Record Locator	Phone	VIP	KP
Doe/John J.	May 22 20 09:55 AM	Venice	May 22 20 11:45 AM	Paris-DGaulle	Delta Air Lines	A1BCD2	123 456-7890	Y	
Doe/John J.	May 22 20 14:05 PM	Paris-DGaulle	May 22 20 20:55 PM	Atlanta	Delta Air Lines	A1BCD2	123 456-7890	Y	
Smith/Susan P.	May 22 20 17:45 PM	Venice	May 22 20 19:35 PM	Paris-DGaulle	Air France Airlines	A1BCD2	123 456-7890		
Smith/Susan P.	May 22 20 23:25 PM	Paris-DGaulle	May 23 20 17:45 PM	Shanghai - Pu Dong	Air France Airlines	A1BCD2	123 456-7890		







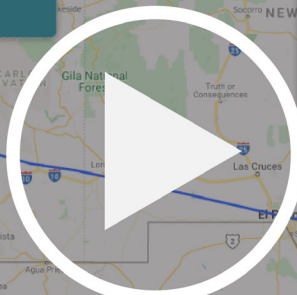
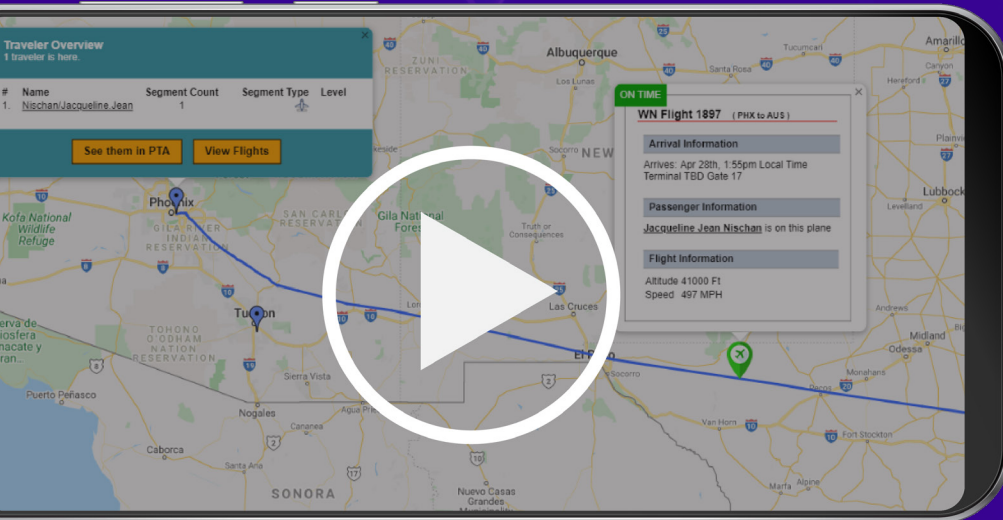
## PeopleMap

World view of all travelers' locations in real time

Visual track flight paths and current aircraft locations, ETA status

Identify all travelers on a specific flight

Color code to immediately identify VIP or standard traveler



## Communicating with Travelers: Validating their Safety

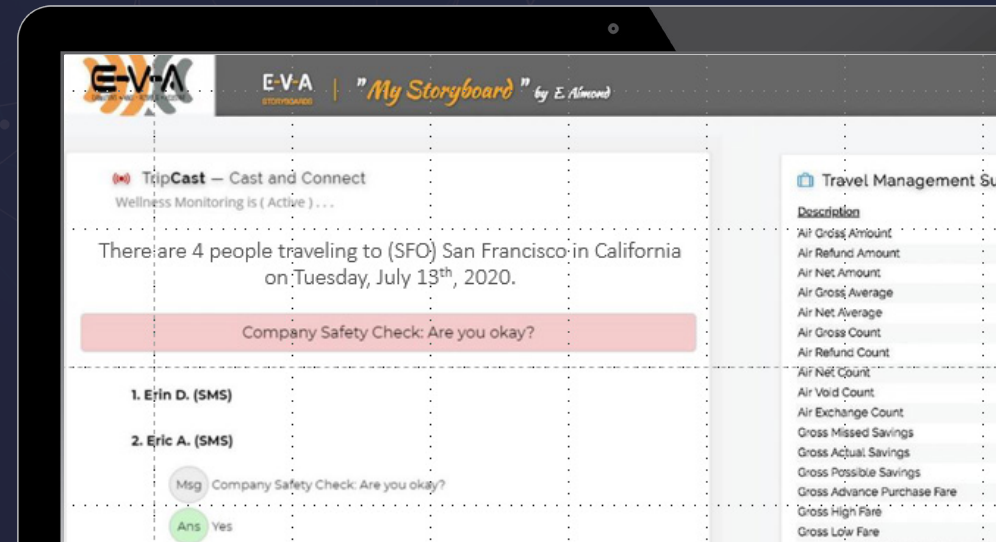
Having the ability to easily track and communicate with your travelers is essential to any duty of care program.

## E-V-A Evolution Voice-response Assistant

E-V-A is a voice-activated, interactive tool that uses Alexa on any Amazon device

Locate and instantly validate all traveler's safety at any given location

Locate and instantly validate all traveler's safety at any given location



## TI TOOLKIT

Click the thumbnail above to watch a video demo of PeopleMap.

For more information,  
visit our [COVID-19 Hub](#).

Stay Connected!  
[Follow us Today.](#)



#### TRAVELER RESOURCES



**Restrictions/Re-Entry by State** > List of public health department responses by state

- **New York Traveler Health Form** > Required for entry from states with 10% cases / 100,000 residents

**Restrictions/Re-Entry by Country** > Details searchable by area or country

**TSA Security** > Updated security check protocols

**Airline Requirements to Board** > Which U.S. airlines are blocking middle seats, requiring masks, etc.

**International Immigration and Visa Requirements** > Review country updates for all visa requirements.

**CDC Traveler FAQs** > Frequently asked questions and answers for travelers from the CDC

#### TRAVEL AND PROCUREMENT MANAGER TOOLS



**Returning to Travel - Getting Started** > TI has outlined a starting path as you commence your return to travel strategy

**Guide to Managing Cancellations and Credits** > Answers to your detailed questions relating to waivers, name changes, unused tickets and cancellations

**Duty of Care** > A comprehensive view of TI's tools to ensure your traveler safety and security ([Video Option](#))

**Traveler Readiness** > Information and traveler responsibilities as they prepare for upcoming trips, as well as guidelines during your journey ([Download Infographic](#))

**Hotel Negotiations** > TI's recommendations as you consider your approach to preferred supplier negotiations

**Pandemic Planning Guide** > Best practices for managing travel during a pandemic