

## What is Egencia?

Egencia is the University's dedicated booking tool. The benefits of Egencia include:

- Travelers or travel arrangers can book/reserve flights, hotel, and rail with a stored University card (if approved), reducing or eliminating the need to be reimbursed for such items
- Store frequent flyer numbers and travel preferences (i.e. Aisle/Window)
- Mobile App to book travel, view alerts/delays, communicate with agents, etc.
- Group Travel Planning and Sourcing – For groups up to six, travel can be booked all at once
- Travelers are alerted to potential Travel Policy violations at the time of booking - fares in Egencia will appear as either “in-policy” or “out-of-policy”
- 24/7 Support through the app or telephone

## Booking with Egencia

### *BEFORE YOU BOOK:*

Any travel booked through Egencia must follow the amounts listed on the Pre-Approval and be in compliance with the overall University Travel Policy.

Prior to booking with Egencia, travelers should:

- review the University Travel Policy
- update their profile information in Egencia
- download the Egencia mobile application
- ensure what is to be booked in Egencia has been itemized on a fully-approved Pre-Approval prior to booking

Car rentals can be reserved in Egencia, but a University card cannot be used to fund the rental. A physical card will be required at the rental counter to fund the rental expense.

### *SEARCHING IN EGENCIA:*

Egencia search results will display all rates and fares, regardless of whether those rates or fares are in policy or not. Please ensure that what is being booked is not marked as 'Out of Policy' in Egencia. Out of Policy fares/rates will display the following if not in-Policy: **Out of policy**

Travelers should carefully read the 'Rules and Restrictions' associated with the travel which is being purchased. The 'Rules and Restrictions' identify what is included with the purchase, and it will also indicate items like if the rate is refundable or not, if the item can be 'paid online,' if the item is eligible for loyalty points or frequent flyer miles, etc.

Travelers can search for flights, hotels, etc. in Egencia without having to book, and the search results can be used as the basis for calculating the amounts to enter on the Pre-Approval. It is

advised to enter an amount on the Pre-Approval which is a little higher than the rates found in Egencia to allow for price fluctuations.

#### *MISCELLANEOUS:*

Arrangers can view the travelers they can book travel for in their Egencia profiles. If a traveler is not listed but needs added, a request needs to be entered through the HelpDesk to add the traveler(s) to the arranger's profile.

If Egencia is showing that a trip cannot be booked online, contact an Egencia agent and state that you are having issues with the site. If the Egencia agent books your travel but you were having issues with the site, mention this to the agent and the agent-assisted fee should be refunded.

Egencia may display other add-on services from third-party suppliers which can be purchased as part of a trip, such as airport parking discounts or airport lounge access. These types of benefits are prohibited purchases. Like any other Egencia expense, University purchasing cards cannot be used for these expenses, and these services also cannot be purchased and then reimbursed on an expense report.

### **Payments in Egencia**

Travelers will be allowed to use the University's travel card in Egencia on a per-trip basis, if approved on an itemized Pre-Approval. Travelers can also upload a personal card in Egencia and use that as the payment method for Egencia bookings. Frequent flyer miles and hotel reward points can be earned but cannot be used to make purchases in Egencia.

Egencia transaction fees are \$9.00 per air or rail booking and will be charged to the card used at the time of booking. The fee is charged per booked itinerary.

When booking hotels on the University travel card, choose a hotel room that has 'Pay Online' rates available. Choosing a hotel room with a 'Pay at Hotel' rate means the traveler will have to pay for the room at check-in. Travelers will still need to give a personal credit card at check-in for incidentals, as the University travel card can only be used for room charges.

Department purchasing cards (p-cards) should never be used/uploaded in Egencia.

Egencia purchase notifications are sent to:

- Travelers
- Egencia arrangers
- Delegate for the traveler

### **Approvals in Egencia**

All Egencia bookings where the University travel card is the payment method will be either approved or denied in Egencia by the Travel Department. Trips will be approved only if:

- The Pre-Approval for the trip in question has been fully approved
- The items requested in Egencia are both:
  - listed in the Pre-Approval
  - at or under the approved amounts on the Pre-Approval (if using the University travel card as the payment source)

For most airlines, seats on a flight are reserved until midnight PST the day after the reservation, including weekends. We want to ensure that a seat is purchased in a timely manner, to both avoid potential price fluctuations and to guarantee a seat, so we ask that all travel be booked in Egencia Sunday through Thursday. This should ensure that the reservation isn't automatically cancelled if attempting to book over a weekend.

### **Mobile Application**

The Egencia mobile app can be downloaded from the iOS or Android stores. The mobile app is used for:

- flight alerts, travel warnings, etc.
- booking or viewing travel
- communicating directly with travel agents

To sign in to the mobile application, travelers should click the 'SSO Login' link in the lower-right portion of the screen. At that point, the traveler can sign in using the same method as any other University application.