

## Compliance Feedback for ESE Monthly Meeting 3/26/26

### ESE Office Hours:

Just a reminder that we hold an open office hour Zoom meeting every Wednesday at 12pm for any questions or help you all may need. We also will make sure someone is present for the entire hour period in case someone comes in later with questions.

Link to the meeting is on the ESE Calendar which can be found on our website: <https://www.co-ese.uw.edu/>

### 1099 Reporting Threshold:

Per Procurement Services effective Jan. 1, 2026, the threshold for collecting payee tax information for reporting purposes has increased from \$600 to \$1500.

### Update on Registrations for events within and not-within WA:

We went over this previously, but we know there's still some confusion regarding this topic and we are reaching out to central offices to get clearer guidance on how to handle this for various transaction types (i.e. Procard versus Non-Travel ERs versus MPs).

For Travel ERs that involve registrations, please reference UW Travel Services new Conference Expenses page: <https://finance.uw.edu/travel/registration>

### Ride Shares to and from Meals:

Due to some recent send backs from UW Travel and to ensure we are meeting UW policy, all ride shares to or from meals need to be verified as not for personal preference or convenience and were for a UW business purpose. Please note this in the memo line.

Please see the full policy here: <https://finance.uw.edu/travel/nonreimbursable> under "Ground Transportation examples."

### Airfare Class in Workday and Complimentary Fare & Seat Upgrades:

When entering the "Class of Service" in Workday for airfare, choose the highest class of fare that was flown.

- If the upgrade was complimentary due to a rewards status, please note this in the memo line.
- If the upgrade was complimentary for some other reason, please attach supporting documentation (such as a letter from the airline).

This applies to complimentary **seat upgrades** as well. If a complimentary seat upgrade was given, the class of fare entered in Workday should be "Premium Economy" and you should note the upgrade was complimentary and at no extra cost in the memo line.

- These complimentary seat upgrades are very common when flying Alaska for Atmos reward members, so please keep an eye out for when it says a "Preferred Seat" was chosen.

### Car Rental Class in Workday and Complimentary Upgrades:

When entering the "Class of Service" in Workday for car rentals, choose the class that corresponds with what was driven (not necessarily the class charged).

- If the upgrade was complimentary, and the class driven is different than the class charged, please note this in the memo line.

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### QuickTips in Workday:

For Expense Reports and Spend Authorizations, UW Travel has been working on a feature to provide quick tips and hints directly into Workday for certain fields. These can be accessed by clicking on the small Question Mark bubbles beside the field. (Slide is from Quarterly UW Travel meeting)

## Workday Updates (Demo)

### ➤ In Progress - QuickTips (Expense Reports & Spend Authorizations)

The screenshot shows a Workday Expense Report form with the following fields and callouts:

- Memo:** A callout box with a question mark icon and the text: "Required - Provide the specific business need for the expense."
- Company:** A dropdown menu showing "UW1861 University of Washington" with a question mark icon.
- Expense Report Date:** A date field showing "03/12/2026" with a question mark icon.
- Arrival Date:** A date field showing "MM/DD/YYYY" with a callout box: "Arrival Date - Start date of travel."
- Departure Date:** A date field showing "MM/DD/YYYY" with a question mark icon.
- Class of Service:** A dropdown menu with a callout box: "Class of Service - Airfare, Train: Please choose a 'Class' (Economy, Premium, Business, or First). Car Rental: Choose a vehicle type from the provided list. Do not use any 'class' type or options for Airfare." Below the callout are buttons for "Airfare Upgrades" and "Car Rental".
- Business Purpose:** A dropdown menu with a callout box: "Business Purpose - Select an option from the drop-down menu. Scroll down to find CTA and ICA CTA transactions. Suggested for you: Business Travel Reimbursement, CTA Card Verification, Field Advance, Non-Travel Reimbursement." Below the callout is an "Add" button.
- Itemization:** A section with the text: "Use the button below only if your company's expense policy requires." Below this is an "Add" button.

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Currently this only works for creating an Expense Report for yourself, not yet others, but the intention is to add this feature to creating Expense Reports for Others as well.

### ESE UW Connect Finance Form Guides:

We have been working on supplementary materials for some of the UW Connect Finance forms that our customers frequently use, providing guidance to what we in the ESE are looking for in certain fields and tips on related topics.

The Purchase Request form and the Travel Reimbursement Request forms are now live on the [ESE's website](#) and more are on the way!

Please take a look and let us know what you think, we would love feedback on what is and isn't working in them or if anything needs further clarification. You can do this by sending a [UW Connect General Finance Help Request](#) or email Stephanie Nevin directly at [nevin11@uw.edu](mailto:nevin11@uw.edu).