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# Town Hall: Southwest Airlines

Statewide Travel Program

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# 1. State Policies

## 1.1 Fare Policies

### **I rarely see the option of Southwest Basic available in Concur, is there a reason for that?**

Optional users can choose to block Southwest Basic fares on Concur. Please email [StatewideTravelProgram@dgs.ca.gov](mailto:StatewideTravelProgram@dgs.ca.gov) and we can work with your agency to block or unblock fares.

Executive branch agencies automatically have Basic fares blocked, as they are highly restrictive and can lead to unexpected costs.

### **Are we able to unblock the option to choose Basic for our agency?**

Yes, please email [StatewideTravelProgram@dgs.ca.gov](mailto:StatewideTravelProgram@dgs.ca.gov) and we can work with your agency to block or unblock certain fare types.

### **Can you clarify what the default fare type should be for a non-frequent flyer at a state agency?**

For Southwest Airlines, Statewide Travel Program (STP) recommends both frequent and non-frequent travelers book the Choice fare type. Although this is a nonrefundable fare, it can be transferred to any other traveler within the respective agency. For executive branch agencies, Choice fares comply with .

### **As a state employee, are we restricted to purchasing a certain section in the aircraft? Are we allowed to book seating that has an additional cost?**

This depends on your agency. Executive branch agencies must comply with [State Administrative Manual \(SAM\) Section 4117.1](#). Optional user agencies should check or update their internal travel policies.

### **Can Choice fares booked via Concur be upgraded to extra legroom directly with Southwest by the traveler?**

Yes, the traveler can use a personal form of payment at the ticket counter to upgrade their seat.

## 1.2 Booking and Canceling

### **You mentioned travelers may need to book an additional seat. What parameters are needed to book that?**

An additional seat may be a Reasonable Accommodation for multiple reasons. Please review or update your agency's internal policies to ensure compliance. Please see slide 7 of the [Town Hall: Southwest Airlines PowerPoint](#) for more information.

### **To get a good price, when shall staff book the flight?**

Executive branch agencies are cautioned against booking flights more than two billing cycles (U.S. Bank) in advance due to State Controller's Office payment processing restrictions.

Refer to your agency's travel policy for specific guidance. Broadly, we recommend booking 2-8 weeks in advance. State travel policy requires domestic flights to be booked at least 7 days prior to the anticipated travel date, and at least 30 days in advance for international flights. Fares vary based on the airline, itinerary, available inventory and general demand.

**Will there be an option to pay for checked bags either in Concur, or in the Southwest app?**

Southwest.com allows pre-payment of bags; however, executive branch agencies are prohibited from prepaying for goods and services and travelers should only pay for the checked bags once they arrive at the airport kiosk or ticket counter.

**When we need help booking and want to call, do we call CI Azumano and is this different than calling a general Concur agent?**

Concur is simply the online booking tool for making travel arrangements; there are no Concur travel agents.

CI Azumano is the travel agency the state of California uses to book all business travel. Please see [Who's Who in State Travel](#) for clarifications on the different entities within the Statewide Travel Program (STP).

**If an employee has a Southwest credit card, which provides an allowance for one free bag, can we use that credit card to book our flight instead of using the state's account?**

A traveler's personal credit card is not required to pay for the flight in order to receive the complimentary checked bag. The traveler can present their Southwest Rapids Reward credit card at the counter for the free checked bag. Additionally, if their card is linked to their Rapid Rewards account, and the traveler has their Rapid Rewards information loaded in Concur, the free checked bag will automatically be applied when at the ticket counter.

**Do we allow travelers to use Concur to extend their trip for personal reasons (leaving early or staying back after business trip)?**

This depends on the agency's internal travel policy. Please email [StatewideTravelProgram@dgs.ca.gov](mailto:StatewideTravelProgram@dgs.ca.gov) with specific questions.

**Will the employee cancel the flight directly through Southwest, and if not, why?**

Travelers should never change or cancel their travel directly with an airline.

If a traveler cancels a flight directly with Southwest, the flight cancellation and unused ticket credit information will no longer be visible in STP's or CI Azumano's system or reporting, making it difficult to track funds and employee business travel activities.

## 1.3 Reconciliation

**Are checked bags still free for active-duty military members?**

Yes, active-duty military members still receive a free checked bag if they present a valid military ID card at the airport counter.

**Will Statewide Travel Program provide any guidance on requesting a refund for the extra seat or do we just follow the instructions on the Southwest website?**

Please see slide 7 of the [Town Hall: Southwest Airlines PowerPoint](#) for more information.

**Is it possible to receive a "no show" email when the traveler says he took that trip?**

[STPAudits@dgs.ca.gov](mailto:STPAudits@dgs.ca.gov) sends "No Show" notifications to agency Travel Coordinators when they are informed that a traveler did not board their flight. If you have any questions or need clarification, feel free to reply directly to the email you received.

## 2. Southwest Policies

### 1.4 Fare Types

#### **Will disabled (ex. blind) passengers still be able to preboard, regardless of seat type purchased?**

Disabled travelers are still able to preboard. They need to contact a Southwest agent upon arriving at the airport for assistance with preboarding.

#### **Are all seats in the Basic fare class the same price?**

No, Southwest has a fluid pricing model. The price of the fare will change based on availability and demand.

#### **Choice Fares are non-refundable, transferable and don't expire, correct?**

Choice fares are non-refundable, transferable and expire 12 months from the date of purchase.

#### **Did you say that booking a flight on Concur doesn't guarantee a spot on the plane?**

Booking a flight on Concur will reserve a spot on the plane for a traveler. Southwest does not over-sell flights, so booking the ticket will guarantee the traveler will be on the plane. However, the traveler is not guaranteed a specific seat choice unless they choose the seat with a CI Azumano travel agent.

### 1.5 Seat Selections

#### **Do the seats in the emergency exit aisle cost extra?**

Yes, the emergency exit aisle seats are an extra cost because they are considered an "extra legroom seat."

#### **What if the traveler doesn't call CI Azumano to choose an airline seat? Will they lose their ability to get on the flight?**

No, the seat will be automatically assigned upon check-in, or 24 hours before the flight.

#### **Will we be charged an agent fee if we call CI Azumano to select a seat?**

No, there are no extra fees or charges for a CI Azumano agent assigning a seat to an existing reservation. You are only charged agent fees when booking, changing, or cancelling travel. That being said, if calling CI Azumano to book a flight with a seat selection, there will be an agent-assistance transaction fee assessed.

#### **Can arrangements for an extra seat be done through email?**

Yes, these arrangements can be made with a CI Azumano agent over the phone or by email.

**Is there an estimated time for when Concur will allow our travelers to pick their seats on flights?**

This is a project that Southwest, CI Azumano, Statewide Travel Program, and Concur are collaborating on. The backend systems are ready; we are currently waiting for Concur to push out updates and support the functionality.

**Even if we are A list or A list Preferred, it sounds like we could still end up in middle seats because we are unable to choose our seats. Is this the case?**

Tier members can select a seat before other travelers.

As a reminder, you currently must call CI Azumano to choose your seat for Southwest. If you do not choose your seat with CI Azumano, you will be assigned a seat 24 hours prior to the flight, regardless of your reward level.

## 1.6 Rapid Rewards

**When Southwest offers free in-flight Wi-Fi beginning October 24, 2025, is a Rapid Rewards account required?**

Yes, a Rapid Rewards account is needed to access free in-flight Wi-Fi. Otherwise, Southwest Wi-Fi is \$8 per flight. Please note that it is free to sign up for Rapid Rewards.

**Who do I contact if my Southwest Rapid Rewards account is not linking to my Concur profile, even after I entered the Rapid Rewards information?**

Please ensure the first, middle, and last name on your Concur account matches the first, middle, and last name in your Rapids Rewards account. If the names match and you are still having issues, please contact CI Azumano to assist. Travelers can always contact Southwest to attach a Rapid Rewards account to flights, or ask for it to be added at the airline counter upon check-in.

## 3. Ticket Credits

### 1.7 Unused Ticket Credits (UTC)

**Can we still transfer the ticket credits to another employee if the employee already booked his flight and flying this Friday?**

No, once a flight is booked, a UTC cannot be applied to that flight retroactively. A UTC can only be applied to a new flight at the time the new flight is being booked.

**Even though a Basic Fare purchase is typically out-of-policy, if a traveler has done this and the ticket is unused, is there a mechanism in place where the ticket can be "upgraded" to a Choice ticket for a fee so the funds can be transferred to a new traveler?**

There is no mechanism in place for this; however, you can cancel the Basic fare flight and use the resulting ticket credit to purchase a new flight as a Choice fare.

**Can an old Southwest UTC (issued before May 2025, and not transferred to UATP) be transferred to another passenger or does the original traveler have to use it prior to expiration?**

All UTCs issued and canceled before May 28, 2025 are being swept into each agency's UATP account. If the UTC is from a Wanna Get Away fare (now called Basic), then it can only be used by the named traveler.

**Can you apply an unused ticket credit (UTC) to an already booked flight?**

In short, no. Once a flight is booked, a UTC cannot be retroactively applied. You would have to cancel the existing reservation and rebook with the UTC. This is not recommended as the cost of the flight may increase, the agency would incur additional transaction fees, and you would end up with two UTCs to apply instead of just one.

**If you cancel a booked flight (already booked over 24 hours), will that create a credit or refund?**

It depends on the type of fare that was booked. If the traveler has booked a Choice fare, which is nonrefundable, it will create an Unused Ticket Credit. If the traveler booked a refundable fare (Choice Preferred), the funds would go back to the original form of payment.

**Are UTCs still getting applied first for travelers that have UTCs available?**

Yes, UTCs will be automatically applied as the first form of payment, if available and applicable.

**To use the funds in the UTC card, do we complete the form of Southwest credits and send it to CI Azumano with new reservation?**

The Southwest Flight Credit Transfer form is only needed when transferring a Southwest UTC to another traveler within the agency. There is no UTC card. To use UATP funds, the traveler just needs to book a flight, and the UATP funds will be applied to the flight, if available.

**If the transfer form shall only be used for funds that expire on or after May 29, 2026, how about for credit that is not going to be used by the traveler before this timeline?**

The Southwest Flight Credit Transfer form is only applicable to Southwest Choice ticket credits. For information on transferring credits for other fare types or airlines, please refer to the monthly email from CI Azumano containing Unused Ticket Credit details.

**Would transferring ticket credits to another employee that already has a booked flight (booked over 24 hours) create another ticket credit with the new booked flight?**

It would still be the same ticket number with the same expiration date. It would just be assigned to a new traveler, so the same fare rules would apply, and the same expiration date (from the original booking date) would still apply.

**To reconcile the UTC correctly, should we rely on the monthly report sent by CI Azumano on 18th day of each month?**

Travel Coordinators will receive Unused Ticket Credit (UTC) reports from CI Azumano on the 18th of each month. These reports can be reconciled with the 'Unused Tickets' report available in Concur Reporting.

**Can we get a refund for the UTC if we're unable to transfer it? For example, employee A has 2 UTCs they're unable to use. We attempt to transfer the UTCs to employee B through the Southwest Flight Credit/UTC Transfer Form. We were unable to transfer a UTC to employee B because a portion of the UTC was booked as basic economy fare. A CI Azumano agent was able to work with Southwest to get a refund. If Southwest can offer a refund, then can we request a refund for the other UTC? Going back to the previous example, employee A has 2 UTCs, both containing a basic economy fare. Southwest was able to refund 1 UTC but not the other.**

Typically, no. When a flight booking includes multiple fare types and becomes a UTC, the rules of the most restrictive fare will apply. Without specific details of the UTC(s) referenced, it's important to note that neither Southwest Airlines nor CI Azumano is obligated to issue a refund solely because a Basic fare was included in the booking. If you have additional questions, please email us at [StatewideTravelProgram@dgs.ca.gov](mailto:StatewideTravelProgram@dgs.ca.gov).

## 1.8 Universal Air Travel Plan (UATP)

**If there is a final UATP balance that is not enough to purchase new airfare, how should we proceed?**

The card needs to have a balance that covers the entire ticket in order for automation to use the UATP card.

**If there are still UATP funds, even though UATP has ended, how can we ensure they are getting used?**

Just to be clear, new transfers into the agency UATP are what we've discontinued. The UATP funds are still available and do not expire until 2040; so, there's plenty of time to use those funds until there's a \$0 balance. We have been working with CI Azumano continuously to make sure that those funds are used first prior to CTA accounts being charged.

## 4. Additional Resources

### 4.1 CI Azumano

Website: [www.caltravel.ciazumano.com](http://www.caltravel.ciazumano.com)

Email: [CalTravel@ciazumano.com](mailto:CalTravel@ciazumano.com)

Phone: 1 (877) 454-8785

### 4.2 Concur

[Concur Login Page](#)

### 4.3 Statewide Travel Program

Website: [www.dgs.ca.gov/OFAM/Travel](http://www.dgs.ca.gov/OFAM/Travel)

Email: [StatewideTravelProgram@dgs.ca.gov](mailto:StatewideTravelProgram@dgs.ca.gov)

Phone: 1 (916) 376-3974

- [Air Travel 101](#)
- [Airline Best Practices](#)
- [Airfare Resources](#)
- [Events Page](#)
- [State Travel Policy Resources](#)
- [SAM Section 4117.1 Airlines](#)
- [Town Hall: Southwest Airlines PowerPoint](#)
- [Trainings Resource Page](#)
- [Travel Coordinator 101](#)
- [Travel Coordinator Resource Page](#)
- [Travel Updates Subscription](#)
- [Unused Ticket Credit Management – User Instructions](#)

If you have a training need and don't see it on the Trainings Resource page, please reach out to [StatewideTravelProgram@dgs.ca.gov](mailto:StatewideTravelProgram@dgs.ca.gov) Attention: Training, with suggestions.