Instructions for processing Guest Travel in Concur - First determine your guest type:

Option #1 - One time guest - Guest will have only one air and/or reimbursement transaction:

**Book Travel:**

**Air** – select one option:

A.) Booking Tool:

- Contact the travel office to have Concur “Book as a Guest” permissions assigned
- Go to the Concur booking tool and select “Book as a Guest”. Complete the reservation, entering your guest information into the passenger screen.
- Concur will present the Request button. Complete a Request and submit for approval.
- Ticket drops into TMC queue for ticketing.

Note: When using this option, the request generated from the booking must be completed in one business day, or the reservation is cancelled.

B.) Book direct with TMC (You MUST use this option for Candidates as you cannot legally ask their Date of Birth):

- You or the guest may call the TMC to reserve a flight, but if the guest is a candidate, they must call the TMC directly, as the TMC is not restricted from asking DOB.
- UO Host provides the TMC with these required details:
  - The UO host’s 95 UO employee ID number to associate the credit card charge to reconcile the air expense.
  - The email from Concur forwarded to show the approved Concur Request.
Enter a Concur Request and select:
  o  "UO-Guest Request Policy"
  o  #2 – TMC, for “How will I book my trip”.

C.) Guest books and pays for own airline transportation and submits reimbursement. Select #3, “Already used Concur Booking Tool”.

**Reimbursement (Expense Report):**

- Log in to the UO Host’s Concur profile.
- Click on Request, Active Requests, find the Guest’s Request. Click on the “Expense” button in the Action column to create an Expense report associated with that request.
- **Check to be sure “*Guest Policy” carries over to the Expense report from the Request.**

Enter all required fields, including the Guest’s Vendor or 95 number and Non Resident Alien status.
Guest Approval: Use the Print/Email button to email report summary to guest for review and approval. Guest must supply an email saying:
“I have reviewed my trip to DESTINATION on DATE for $XXX.XX and I certify that this claim is true and correct and that no part has been claimed previously or will be claimed from any other source.”

- Delegate uploads guest’s approval email to Expense type “Other Supporting Documentation” with Additional Information note: Guest Approval, and submits on behalf of guest traveler.
- Payment will direct to the guest.

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Option #2 – Guest with multiple transactions/ongoing relationship – Guest will receive multiple, ongoing reimbursements:

- Guest requires a Concur profile. Go to forms.uoregon.edu, Business Affairs, Travel, Concur Guest Intake form.
- Travel Office builds Concur profile for guest, including delegate(s) and Approver(s). Delegate must work on behalf of traveler as they do not have a uoregon.edu email address to access the Concur profile.

Book Travel:
Air:
- Submit Concur Request for traveler, choosing “How will you book your travel” - either #1 Use Concur online booking tool, or #2 TMC direct. (Traveler may also book their own air and be reimbursed.)
- Once approved, follow directions above for Concur booking tool or TMC booking.

Reimbursement (Expense Report):
- Delegate or UO Host logs into Concur to their profile. From the list of active Requests, click on “Expense” in the Action column.
- Delegate completes expense report and uses the Print/Email button to email report summary to guest for review and approval. Guest must supply an email saying:

“I have reviewed my trip to DESTINATION on DATE for $XXX.XX and I certify that this claim is true and correct and that no part has been claimed previously or will be claimed from any other source.”

- Delegate uploads guest’s approval email to Expense type “Other Supporting Documentation” adding note in Additional Information box: Guest Approval.
- Delegate submits on behalf of guest traveler.

Note: Be sure to use the Concur Guest policy when booking travel for profiled guests. See screenshots for previous scenarios as a guide.