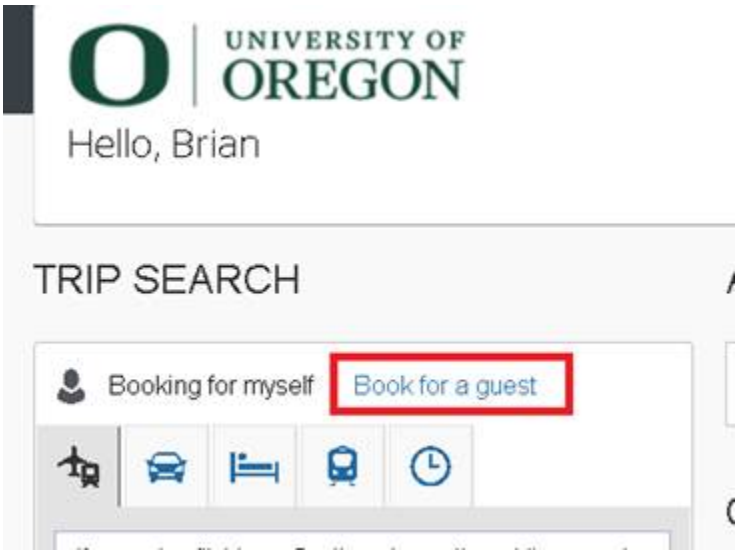
Guest Travel in Concur - <u>One-time or Infrequent Guest</u>

<u>Book Travel:</u>

Air – select one option:

1.) Booking Tool:

- Contact UO Accounts Payable to start the Vendor Set Up process if your traveler will be receiving a travel reimbursement.
- Go to the Concur Book button and select "Book as a Guest". Complete the reservation, entering your guest information into the passenger screen.

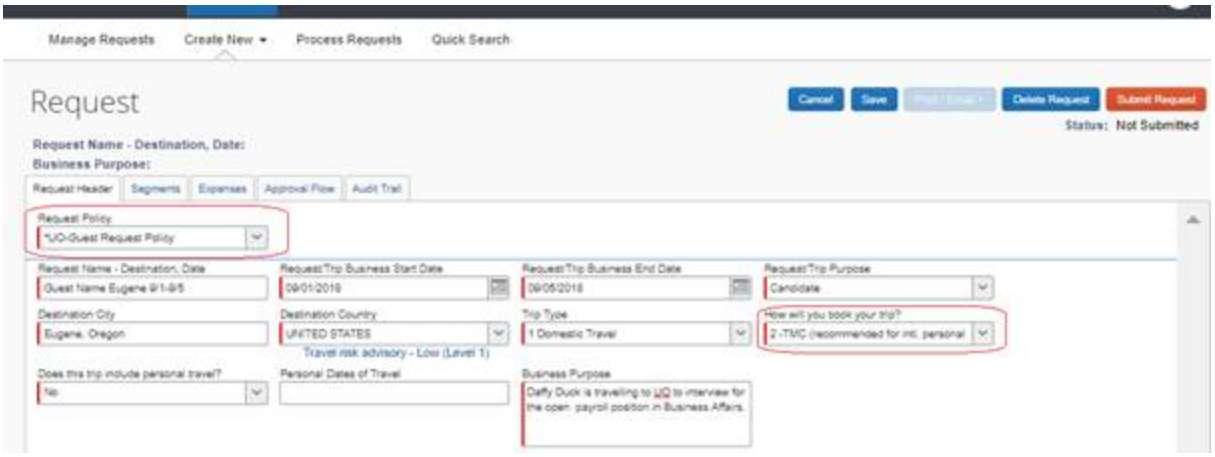


- Concur will present the Request button. Complete a Request and submit for approval.
- Ticket drops into TMC (Travel Management Company – travel agency) queue for ticketing.

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

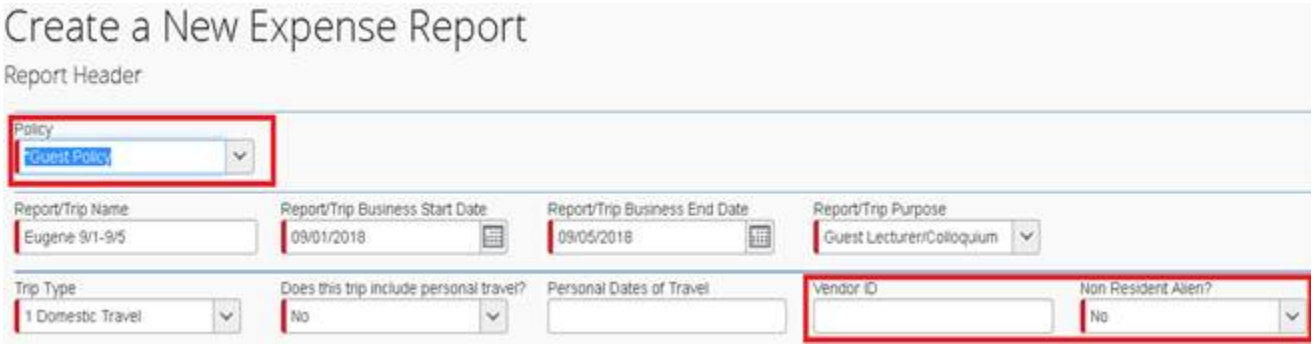
2.) TMC Assisted booking (You MUST use this option for ***Candidates*** as you cannot legally ask their Date of Birth):

- 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:
  - *UO-Guest Request Policy
  - #2 – TMC, for "How will I book my trip".

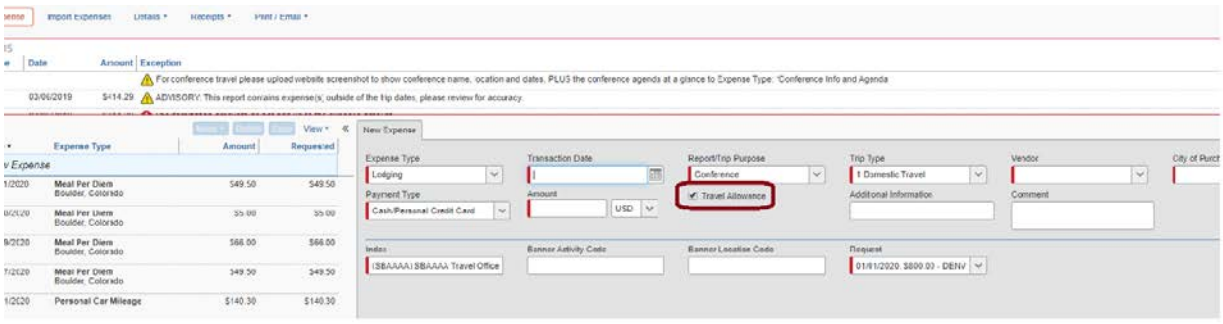


3.) Reimbursement/Expense Report - Guest books and pays for own airline transportation and submits reimbursement. Select #3, "Already used Concur Booking Tool".

- Log in to the UO Host's Concur profile.
- Click on Request, Create New, New Request to complete a pre-travel approval. Be sure to select Guest Policy in the Policy box.
- From the Approved Request, go to the Action column and click on the Expense button.



- Expense Report: Be sure to include the Guest's Vendor or 95 number and Non Resident Alien status.
- **Do not** build an itinerary in the Travel Allowance section if you have multiple guests with the same travel dates or you yourself have travel during these dates. For guest meals, use Expense Type "Guest Meal Per Diem" and enter a lump sum with details about your calculation. (To look up per diem allowance, use GSA per diem rates: https://www.gsa.gov/travel/plan-book/per-diem-rates)
- To reimburse a hotel stay without the Travel Allowance itinerary, uncheck the Travel Allowance check box on the worksheet:



Guest Approval: When processing a report with Airline Expense Only, the UO does not require a Guest Attestation. When Reimbursing a Guest for expenses, you must include the Guest Attestation.

- Use the Print/Email button to email or prepare a pdf of the expense report summary. The pdf will include copies of receipts attached to the report. If emailing, be sure to include your own uoregon.edu address for tracking in your email program.
- Guest must supply an email with this attestation:

"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."

- UO Host uploads the guest's approval email to Expense type "Other Supporting Documentation" with Additional Information note: "Guest Approval". Submits the report on behalf of guest traveler.
- Banner payment will direct to the Vendor or 95 number you entered into the report header.