

How to work with a TMC (Travel Management Company – travel agent) for an agent assisted booking

Planning prior to contact your TMC (Travel Management Company – travel agent):

- a.) Determine your destination airport and travel dates for your business only itinerary.
- b.) If including personal time, determine dates of travel, additional airport stops, when you need to travel to get to your business.
- c.) Will you need rental cars or hotels?

Fares and Reservations:

Important: If you start with the TMC, you must book your ticket with the TMC. If you plan to use the Concur Booking Tool, do not call the TMC. It is not acceptable to confirm a reservation with the TMC and then cancel that reservation and rebook in the booking tool. Our TMCs are commission based and the agency ticket fee is compensation for their time and expertise. Your travel agency partner does not work for free.

Contact the TMC for itinerary and price options. Advise the agent when using Federal grant funds for Fly America compliance or are adding personal time which requires comparison quotes for business only travel.

- a.) Book your desired reservation if you are ready to purchase within 24 hours or less. Ask the agent for ticket rules and advance purchase requirements, i.e., instant purchase, within 24 hours; or 21, 14, 7 day advance, etc.
 - a. Be aware fares are subject to change until purchased.
 - b. Reservations may cancel in 24 hours if not ticketed (purchased).
- b.) Request the comparison quote for the business only itinerary if taking personal time.

Concur Request:

(See Step-by-Step Concur manual for directions: <https://ba.uoregon.edu/travel/concur>)

- a.) Enter your pre-travel approval in Concur Request, selecting #2-TMC in the box “How will you book your trip?”
- b.) Attach * **current** comparison quote if personal time is included, using the “Attachment” button.
- c.) Submit for approval. If personal time is included, travel office provides a first round approver to review for comparison quotes accuracy. Request then moves to departmental approval.
- d.) Once the Request has received final approval, email the TMC the UO Concur **approved** request to ticket which authorizes the purchase to the UO credit card:
 - a. From the Request, click on Print/email button.
 - b. In new window, click on Email box and copy and paste the TMC email address from the TMC line in the upper left. Add your own email address for tracking and the agent assisting, if desired. **Premier Travel: doug@premiertrav.com Direct Travel: uofotravelteam@dt.com**

The screenshot displays a Concur Request interface. At the top right, there are buttons for 'PDF', 'Email', and 'Print'. The main content area shows a request that has been 'Approved'. Key details include: Request ID: 4EVM, Purpose: Conference, Request/Travel Start Date: 07/04/2019, Request/Travel End Date: 07/08/2019, Destination City: Int. OR#39;Har, Destination Country: UNITED STATES, and Requested Amount: \$1,650.00. A blue circle highlights the 'Email' button. A pop-up window titled 'E-Mail Options' is open, showing the email recipient list with 'doug@premiertrav.com' and 'lajacoby@uoregon.edu' entered. The 'Send' button is highlighted in blue.

* A Request may be entered and approved in advance if you are not ready to purchase a ticket. Be aware of ticket rules and that airline prices are subject to change. When entering a request more than a few

days before booking, re-check the air price and if more than \$50 difference obtain an email from your approver approving the difference to be uploaded to the Attachment button in your Request header. If including personal time and rates have changed, a new business only comparison should be prepared at time of ticketing. **There is no need to create a new Request.**

Ticket Confirmation:

- a.) An email with the ticket confirmation will be sent from the TMC once ticketed.
- b.) Review carefully for accuracy of destination, dates, and name spelling. **For exchanges and instant purchase tickets with errors, you must contact the agency the same day to avoid airline penalties.** Some tickets allow 24 hours. Check with the TMC for your ticket review deadline.
- c.) Forward the confirmation email from the agent containing your itinerary to plans@concur.com to sync into your Trip Library. If you are sending on behalf of a traveler, enter their uoregon.edu email address into the subject line. If you have "Verified your Email Address" in your Concur profile, your itinerary may automatically populate in your Concur Trip Library. See Profile Settings to "Verify" your email address.

Changing an existing ticket:

You must make a change to an existing itinerary by calling the TMC. (Changes and ticket exchanges cannot be completed in the Concur booking tool.) **This applies regardless of whether you are using a TMC assist booking or the Concur booking tool.** The travel agent will analyze all options and airline rules for rebooking your reservation and exchanging your ticket.

Business related change:

- a.) No need to create a new Request. Use email to document the business purpose and obtain approval from the traveler's assigned Concur approver for the change fee. Upload the email to the original request using the Attachment button.
- b.) Email to the TMC using the directions above, with the note: **"This change which results in an additional \$xxx.xx charge to the UO Lodge Card has been approved by (Name of approver)".**

Change related to personal reasons:

If the change is related to a personal conflict, the traveler must provide a personal credit card to the travel agent for the ticket exchange. Personal expenses cannot be paid nor reimbursed by the UO.

Cancelling a reservation:

To retain credit for future use, airline reservations must be cancelled prior to flight time. Call the TMC or the airline directly to cancel your reservation. Airline credits appear in your Concur profile.

Concur Profile:

Your Concur profile information is imported into the reservation made by the travel agent. Review and update your Concur profile to be sure you have airline frequent flyer information, travel preferences and contact information. Your Concur profile is the sole source of your traveler information and how the airline contacts you in case of schedule changes or flight cancellation. *(Previous personal profiles are no longer used.)*

Questions?

Please contact the UO Travel Office with any Concur, travel policy or travel expense related questions.

Phone * 6-3100 Email: travel@uoregon.edu