EXPENSE REPORT: GROUP TRAVEL
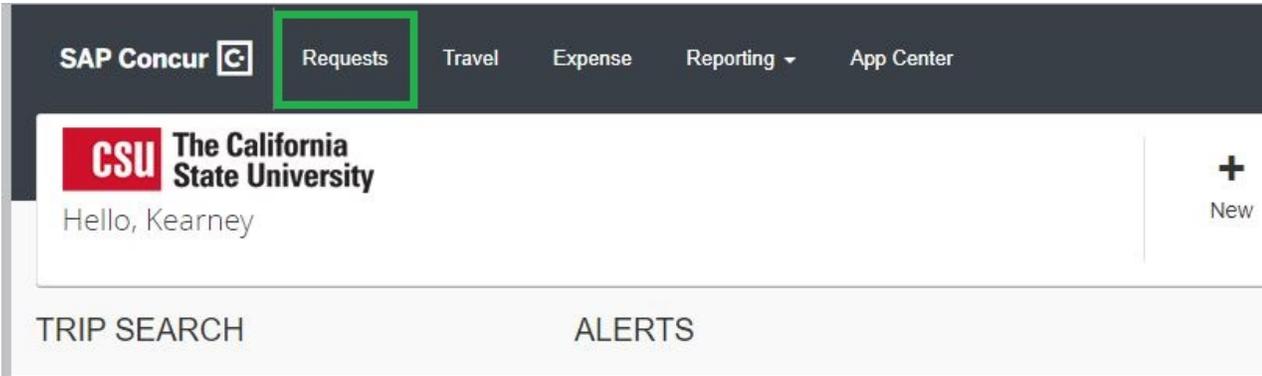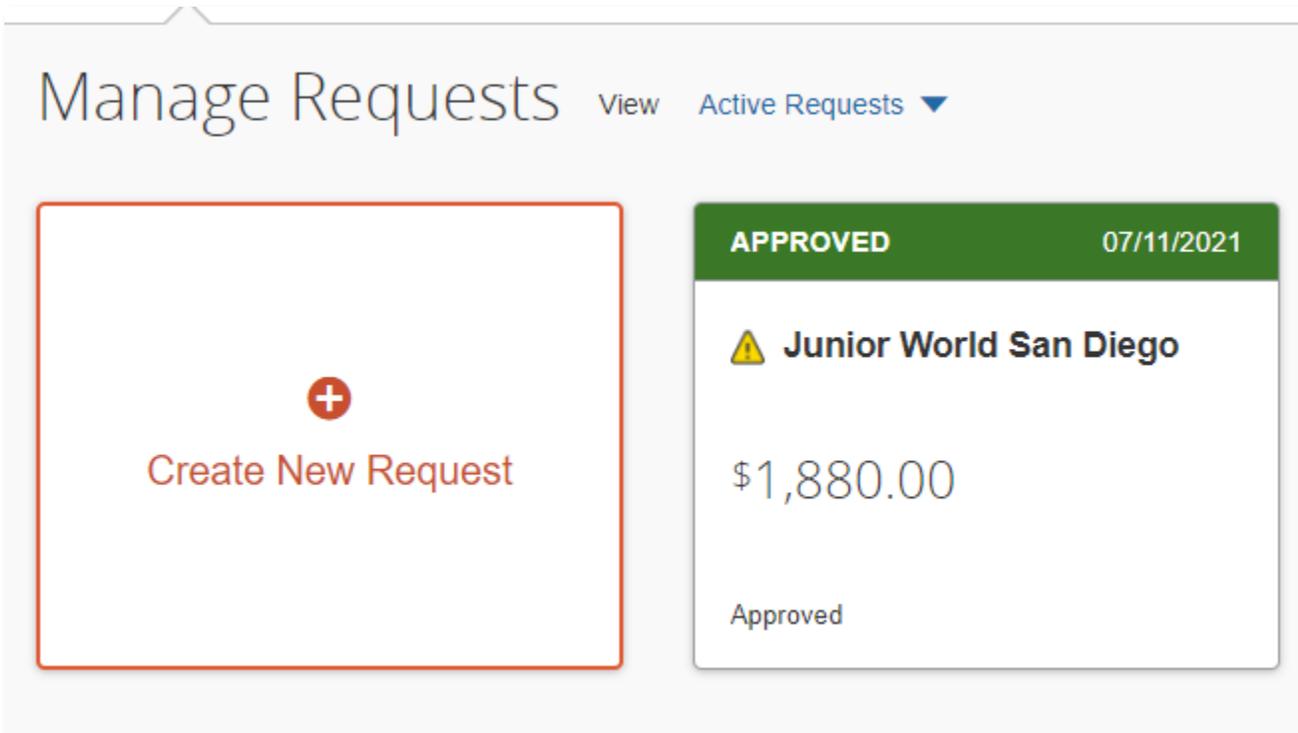
Group Travel is defined as a Concur user (Cal Poly employee with Concur access) paying on behalf of others (students or non-employees)

1. Log into Concur and click **Request** at the top. It is best to start your Expense Report from your Approved Request.

2. Click anywhere in the Approved Request box to Open the Request

3. Click Create Expense Report at top right. Note – if the Request has not been fully approved, this option is not yet available.

4. This will start your new Expense Report and open the Expense Report to add expenses

Move all expenses made with your Concur travel card into your report. These expenses are under AVAILABLE EXPENSES. Click on the box next to all expenses for the expense report that you are creating to **Move to** that report.

**Wait until all of your credit card transactions have posted to your Concur before submitting your Expense Report.

|	Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount
☑		*Ghost Card-USBank	Airfare	AGENT FEE 8900808969288	04/26/2021	$5.00
☑		*Ghost Card-USBank	Airfare	United Santa Barbara	04/26/2021	$722.40
☐		*CSU-USBank-CBCP	Undefined	AMERICANHORT	04/07/2021	$35.00

Concur Expense Report –Group Travel 5.2021 SA

5. Once you have all of your expenses added to your Expense Report, you may need to update the Expense Type for some. Next steps will include some examples of expense types to add for team/group travel.
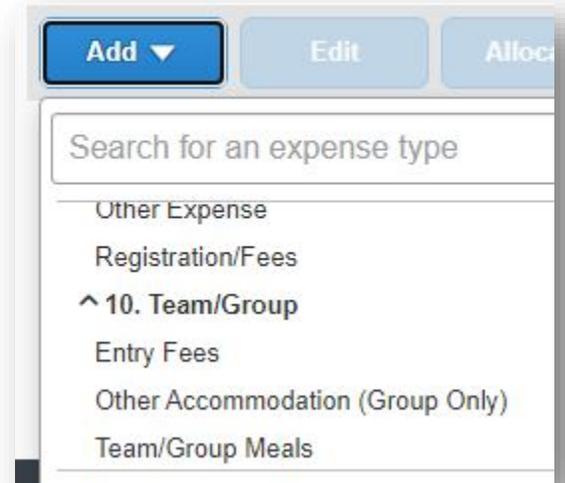
   A. **AIRFARE:** Include the receipt for the total cost of the airfare for all tickets and use the Air Ticket Expense Type
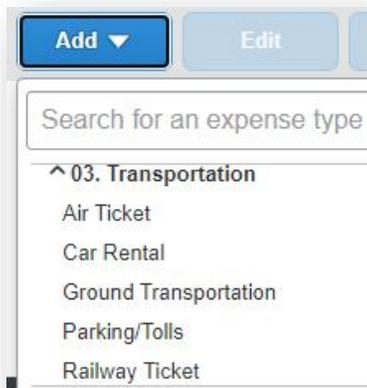
   B. **Car Rental or Ground Transportation:** includes Uber/Lyft or Taxi's.
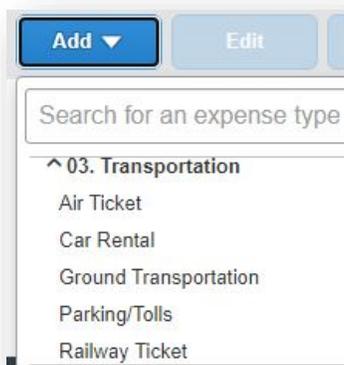
C. Accommodations: To add the cost of multiple hotel rooms or AirBNB/VRBO rentals, scroll to the bottom and select **"Other Accommodation"** expense type. This will allow you to enter in the total for all rooms. Under **COMMENTS**, add the cost per person per night (must be under $275 per person before taxes), click **SAVE**

Add ▼   Edit   Alloca

Search for an expense type

Other Expense
Registration/Fees
^ 10. Team/Group
Entry Fees
Other Accommodation (Group Only)
Team/Group Meals

D. Meals: To add the cost of meals for the group, select **Team/Group Meals.**

Add ▼   Edit   Alloca

Search for an expense type

Other Expense
Registration/Fees
^ 10. Team/Group
Entry Fees
Other Accommodation (Group Only)
Team/Group Meals

A. Under **COMMENTS**, provide information regarding the cost per person per day. For meals over $40 an itemized receipt must be included. Click **SAVE EXPENSE**

B. Once you have added all expenses for your trip, click SUBMIT REPORT. Your Expense Report will the routed to the Budget Analyst for your department for approval, and then to your Manager for approval and finally to the Processor in Payment Services to complete your Report.
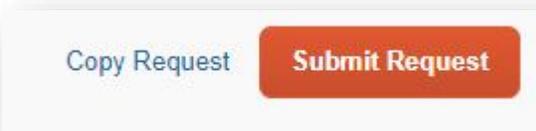
C. If any money is owed to the traveler or owed back to the University, wait to hear from your payment tech on the steps to take to pay back the University, or to receive your payment.