



NON-EMPLOYEE (GUEST): CONCUR TRAVEL

Create New Report

Create From an Approved Request

Policy *

*CSU-Non-Employee Expense Policy



None Selected

*CSU-Non-Employee Expense Policy

*CSU-Expense Policy

Trip Purpose *

- Non-Employee guest travel is defined as an unpaid **guest** visiting the University. Their travel expenses will be paid by a campus department.
 - A *Vendor* or Honorarium visit (someone paid for campus services such as a guest lecturer) will follow a separate procedure.
- Department Travel Supporter (admin, analyst) can BOOK travel and create an EXPENSE REPORT on the guest's behalf. And will need to request **BOOK FOR A GUEST** access on their Concur Travel Tab.
- ***A REQUEST is not required for guest travel.***

BEFORE THE GUEST VISIT

ONE TIME ONLY

1. If you do not have a Concur Travel Card, complete the [application](#) for a Concur card. Once signed and submitted a new card takes 7-10 days to arrive.
2. Admin (who will book on behalf of guest) contacts POLY TRAVEL polytravel@calpoly.edu to request **BOOK FOR A GUEST** access on their Concur Travel Tab . Subject Line: "Book for a Guest"

FOR EACH GUEST VISIT

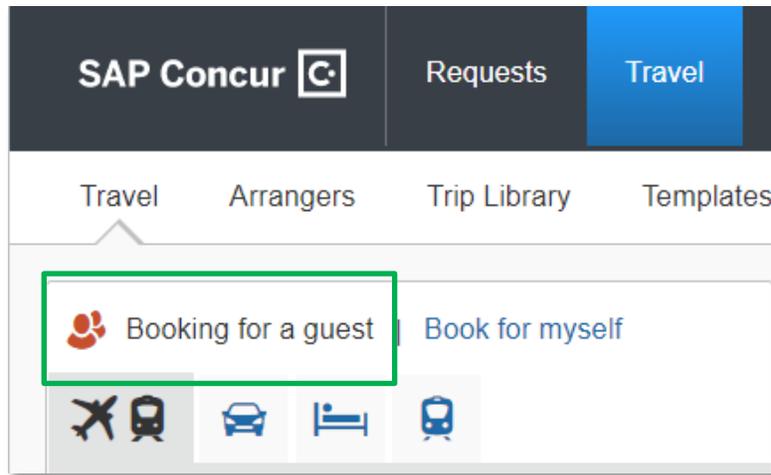
3. Complete [Guest Travel Add Form](#) for guest to be added to Concur for expense report and any reimbursement.
 - a. This step is not required if the guest has no reimbursements.
 - b. The Employee Policy Report Header can be used, and all expenses paid on the Concur card added to the report and submitted for approval and processing.
4. For local hotel booking, download [the Credit Card Authorization Form](#)

BOOKING AIRFARE

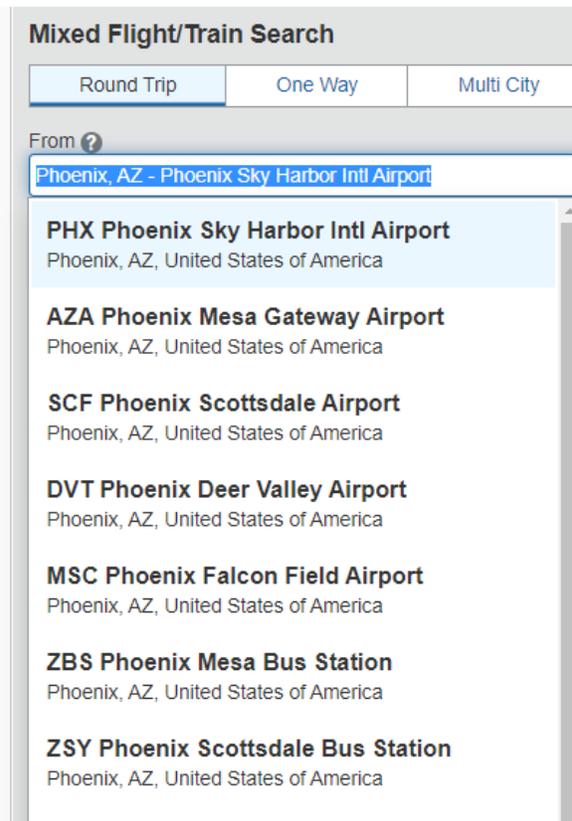
To book **AIRFARE** in Concur you will need:

- To contact PolyTravel and request **BOOK FOR A GUEST** access in Concur
- Guest's Information for booking airfare and hotel.
 - Guest's Legal First and Last name (must be identical as listed on identification that they use for travel)
 - Date of Birth
 - Gender
 - Cell Phone Number
 - Email

1. Open Concur and go to the TRAVEL Tab. Select **Book for a Guest**. This step is critical as you will be entering their information on the reservation instead of your own. Then you can book airfare and hotel in the guest's name.



2. Select the From and To Airports. CHECK whether the airport you select is correct as ALL airports in the area will be available. Most often you will want the International Airport selection as in the example below.



3. Select Flight – non-refundable is OK when booking in Concur.

American Airlines

09:50a PHX → 11:43a SBP Nonstop 1h 53m \$370.80

04:43p SBP → 06:15p PHX Nonstop 1h 32m [Hide Fares](#)

Least Cost Logical Fare [Hide all details](#)

DEPART Tue, Mar 14 – Phoenix, AZ to San Luis Obispo, CA [Flight details](#)

RETURN Thu, Mar 16 – San Luis Obispo, CA to Phoenix, AZ [Flight details](#)

Fare Options	Free Checked Bags	Refundable		
Main Cabin (O, N) Rules Benefits/Services	0	No	✓	\$370.80
Main Cabin Flexible (O, N) Rules Benefits/Services	0	Yes Fees may apply	✓	\$470.80

4. After selecting your Fare Option, you will be directed to a new screen to ENTER TRAVELER INFORMATION

Guest Traveler

Title * Legal First Name * Middle Name (on ID) * Legal Last Name *

Gender * Date Of Birth *

Known Traveler Number DHS Redress No.

Phone * Email *

Frequent Flyer Programs
For American Airlines

5. Seat Selection is the next option but when you click to choose a seat there will be a popup that Seat Selection is NOT available from this page and a seat will be automatically reserved. NOTE: The University does not allow seat upgrades. The traveler would have to pay this fee separately, it is not reimbursable.

SAP Concur

Seat Map

Seat selection is not available from this page. However, seats will be automatically reserved for you based on your profile preferences, and you can change your seats any time after booking is complete.

F																						
D																						
C																						
A																						

SELECT SEATS
Select your preferred seats, otherwise Concur will request

Flight	Seat	Price
AA 3890 Main Cabin (S)	View	
AA 3469 Main Cabin (O)	View	

7. Last step on this page is to review the Price Summary and Method of Payment. SL- Concur Ghost Card is the correct method of payment for all airfare booked through Concur Travel. DO NOT change this payment type. The airfare and charge will show up in your Concur under “Available Expenses” to be added to a report.

REVIEW PRICE SUMMARY

Description	Fare	Taxes and Fees	Charges
Airfare	\$346.98	\$55.82	\$402.80
Total Estimated Cost: \$402.80			
Total Due Now: \$402.80			

SELECT A METHOD OF PAYMENT

How would you like to pay?

Choose a credit card

SL - Concur Ghost Card* (...9806)

* Indicates credit card is a company card

8. Click Reservice Flight and Continue then continue reviewing each page and until the flight is BOOKED (about 4 more screens).

9. One screen will ask for the Request ID. Since a Request is not required for Guest travel, enter the first 3 digits of the last name of the employee booking for the guest and a letter. Example: ALB1

This is a Non-Refundable Ticket

Customers holding NON-REFUNDABLE type tickets may USUALLY cancel their journey, and reuse these tickets to any destination in the carrier's system, within one year following the DATE OF ISSUE (READ THE FARE RULES to be certain this applies). Reservations MUST be cancelled by the intended (original) departure day, or tickets will be void and have NO value for future use. These rules apply to DOMESTIC ticketing only.

By completing this booking, you agree to the [fare rules and restrictions](#) and [hazardous goods policy](#).

BOOKING A LOCAL HOTEL (San Luis Obispo area)

1. Local hotels are booked directly with the hotel and NOT in Concur.

<https://afd.calpoly.edu/procure-to-pay/how-to-buy/events/hotels>

2. Start by selecting the hotel and completing the credit card authorization form. Send the completed form to the hotel via email or fax then contact the hotel to confirm the reservation and give them your complete Concur travel card number for the hotel room and tax charges for the guest.

CAR RENTAL

1. The guest must book their own car rental and can submit the invoice for reimbursement. Car rentals cannot be booked using Concur or the Booking Portal on behalf of guests. This is not allowable per the CSU/Enterprise contract.

2. Personal car mileage can also be expensed and paid directly to the guest if they choose to use their personal car.

EXPENSE REPORT

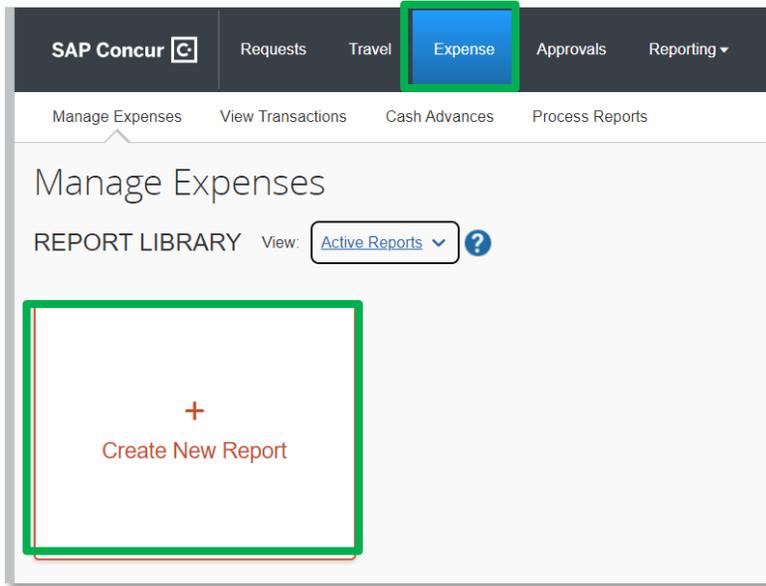
1. A Request is not required for guest travel.

2. Before beginning the Expense Report, make sure that you have completed the **“Add Non-Employee to Concur”** form so that you will be able to add your guest in Concur.

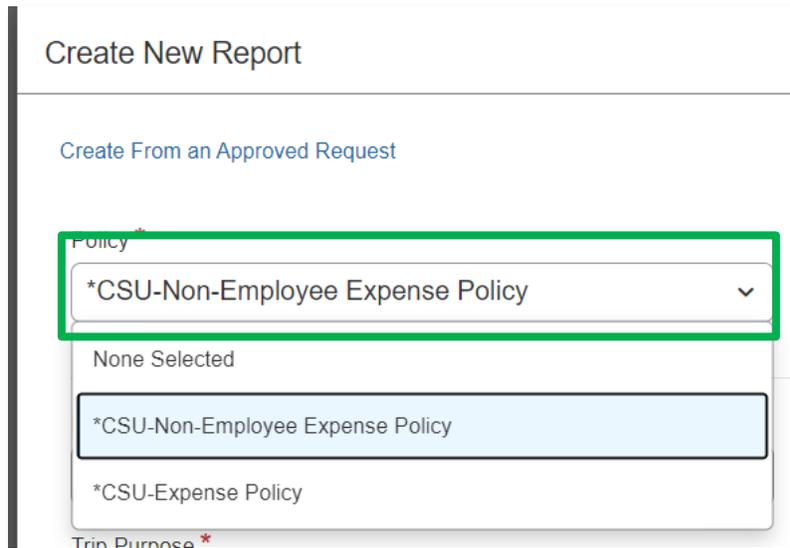
3. Collect all receipts from guest.

4. At the end of the guest’s stay the admin who BOOKED the stay (Airfare, Hotel, Car Rental) will create an **Expense Report** in Concur

5. Start a NEW Expense Report. Go to **Expense**, then **Create New Report**



6. Select CSU Non-Employee Expense Policy on the POLICY drop down.



7. Changing the Policy will add new fields to the Report Header.

- a. **Business Unit for Supplier** will need to be added. It will always be **SLCMP** (Cal Poly SLO). Type in SLCMP and select from the Drop Down.

Create New Report

Create From an Approved Request

Policy * CSU-Non-Employee Expense Policy

Business Unit for Supplier * (SLCMP) SLCMP - Cal Poly San Luis Obispo

Non-Employee Name * Search by Text

* Required field

- b. Then you will add the Non-Employee Name (The name will only be available here if the “Add Non-Employee to Concur Form” has been completed). Best to search by LAST NAME or by Email Address.

8. Section 2 of the Report Header is the trip details including Report Name, Trip Type, Traveler Type, Trip Purpose, Travel start and end dates, destination, personal dates, banned state, or student traveler.

- a. Report/Trip Name: Candidate or Guest Name/Department
- b. NEW Traveler Type: Non-Employee
- c. NEW Trip Purpose: Employee Recruitment/Interview

Report/Trip Name * Recruitment Candidate #4

Trip Type * 1-In-State

Traveler Type * Non-Employee

Trip Purpose * Employee Recruitment/Interview

Travel Start Date * 01/03/2023

Travel End Date * 01/04/2023

Destination City/State San Luis Obispo, CA

Personal Dates of Travel-If none enter NA * NA

Did they travel to a banned state? * No

If Student, did they travel w/Employee? NA

9. The final section of the Header is where the chart field information is added.
 - a. Business Unit must be added here **SLCMP** then the Fund and Dept ID

The screenshot shows the SAP Concur header form. The 'Business Unit' dropdown menu is highlighted with a green box. The dropdown list is open, showing 'Most Recently Used' items. The first item is '(SL-SLCMP-SL001-126500) 126500 - SBS-Procurement Services'. The second item, which is selected and highlighted with a green box, is '(SLCMP) SLCMP - Cal Poly San Luis Obispo'. A green arrow points from the text 'Business Unit must be added here SLCMP' to this selected item. Other fields include 'Fund', 'Department', 'Class', and 'Project', all with 'Search by Text' input fields. Below the header fields is a 'Comments To/From Approvers/Processors' text area.

- b. Concur will show MOST RECENTLY USED chart fields. If you do NOT want the complete chart field under recently used, select only the Business Unit below the line, then you can add the **Fund** and **Dept ID** separately. Program, Class and Project Code are not required but can be added If needed.
 - c. There is also a section to add **COMMENTS** To/From Approvers.

10. Once the Header is complete, click **Create Report**. This will open the page to **Add Expenses** where you will add each expense and receipts as needed to the report.

The screenshot shows the SAP Concur 'Add Expense' page. The top navigation bar includes 'SAP Concur', 'Requests', 'Travel', and 'Expense'. Below the navigation bar are tabs for 'Manage Expenses', 'View Transactions', 'Cash Advances', and 'Pr'. The main content area displays 'Guest Travel \$0.00' and 'Not Submitted | Report Number: OYDRX0'. Below this are links for 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel'. At the bottom, there are four buttons: 'Add Expense', 'Edit', 'Delete', and 'Copy'. A green arrow points from the text 'click Create Report' to the 'Add Expense' button.

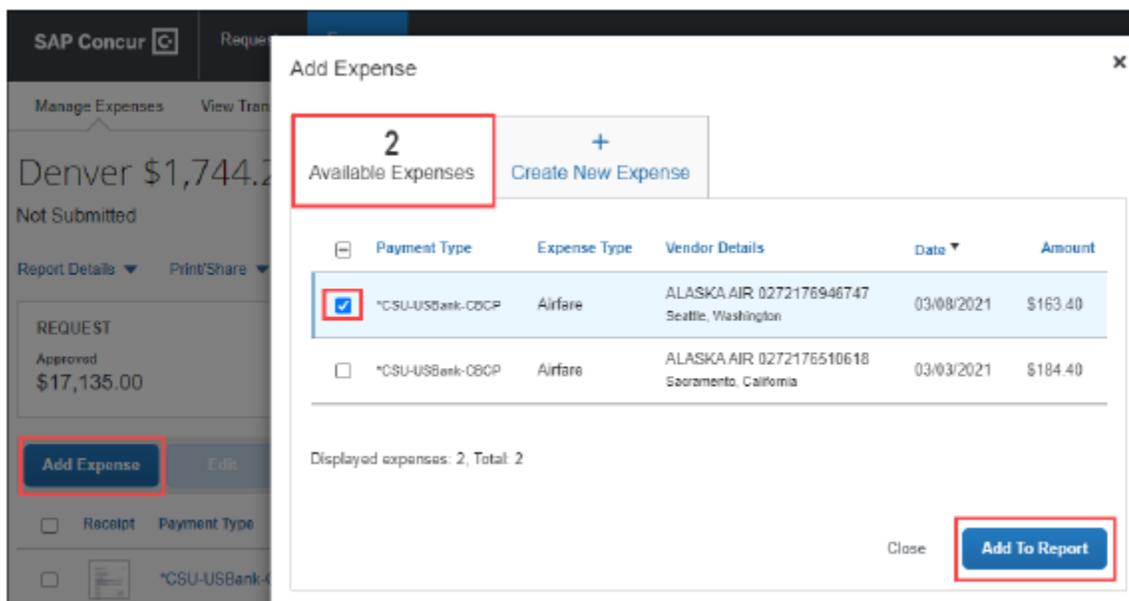
Adding Expenses to the Report

There are several ways to add expenses and compile a complete expense report. Overall, the goal is to reflect all costs associated with a trip, regardless of payment method.

1. Travel Credit Card/Ghost Card Charges

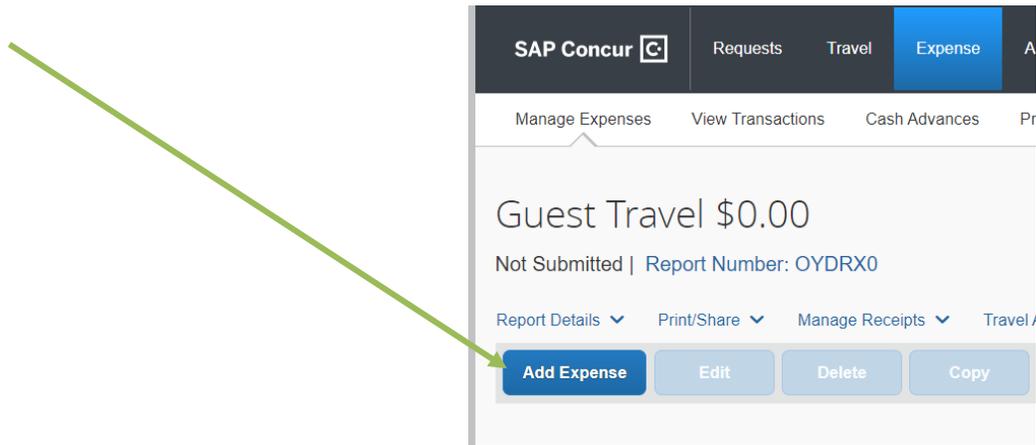
You can add Concur Travel card transactions to an expense report in these ways:

- From the open expense report (**Add Available Expenses**)
- From the **Available Expenses** section (**Expense > Manage Expenses**)
- From the open expense report, click **Add Expense**. Select related expenses and then **Add to Report**

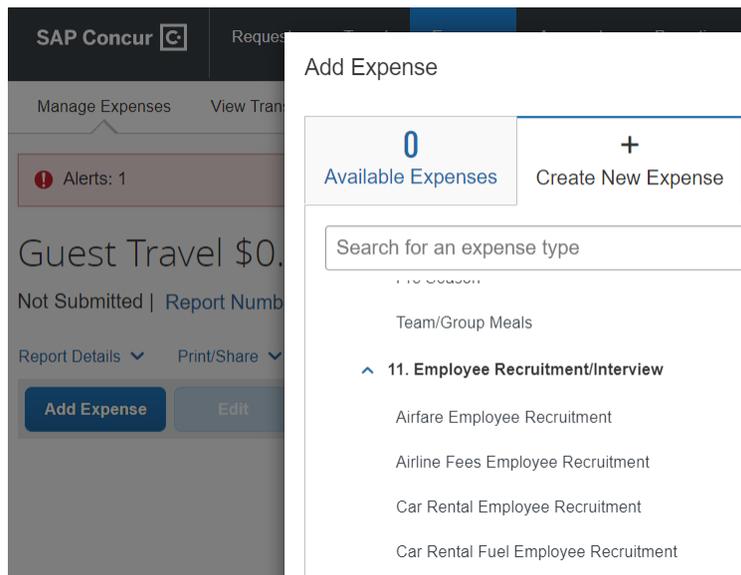


- Then verify or update the Expense Type classification of the imported credit card transaction or any other required fields that need to be populated.
- **Out of Pocket** expenses can be added for the guest (see #2 on next page). Reimbursements will be paid directly to the guest.
- When all expenses, receipts, and required documents have been added to the report, **SUBMIT** the report for approvals and processing.

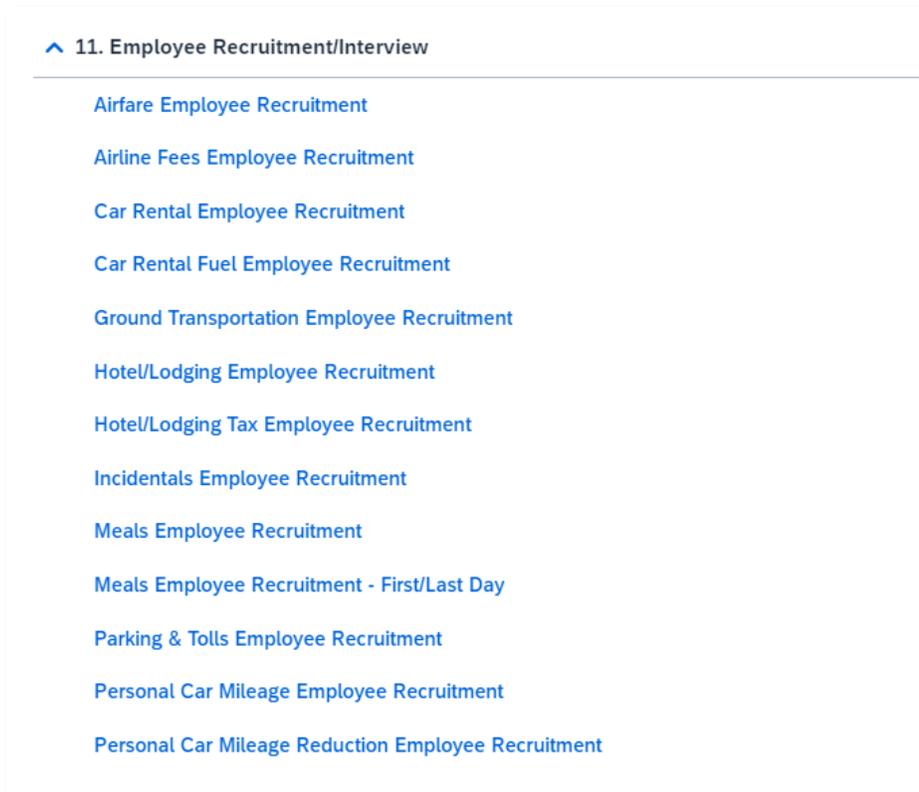
2. Adding **Out of Pocket** expenses to be reimbursed to the guest.
 - a. Click on **Add Expense** on the Report



3. When the Non-employee Policy is selected on the Report Header NEW Expense Types are available and must be used for the guest travel expenses.
 - a. They are all listed under #11. Employee Recruitment/Interview



4. The Expense Types available for guests include:



5. Guests travel expenses must stay within the state spending limits:

Expense	Maximum Reimbursement
Flights	Economy class only (not 'Economy Plus' on United Airlines or the like; nor any upgrades of any sort, including seats)
Hotel (domestic)	\$275 nightly rate
Meals & Incidentals	\$59/ person/ day
Car Rental	Intermediate size car
Mileage Rates	IRS mileage rate (updated annually in Concur)

6. Hospitality Expense can be added when hosting the guest. An itemized receipt is required, and the Hospitality Justification form must be attached.

7. MEAL EXPENSES - The Meal Employee Recruitment and Meal Employee Recruitment First/Last Day Expense Type must be used. When the guest is staying multiple days, the expense type must be added for each day and **cannot exceed \$59.00 for that day**. See section on adding Meal Per Diems on how to add meals for a guest.
8. Once all expenses (Concur card charges and out of pocket reimbursable) have been added to the report and the required receipts and documents have been attached, SUBMIT the Expense Report for approvals and processing.

ADDING MEAL PER DIEMS FOR GUESTS

1. Use New Expense Types under 11. Meals Employee Recruitment.

The screenshot shows the 'Add Expense' interface. At the top, there is a header 'Add Expense'. Below it, there is a box with '0 Available Expenses' and a '+ Create New Expense' button. A search bar contains the text 'Search for an expense type'. Below the search bar, a list of expense types is displayed: 'Ground Transportation Employee Recruitment', 'Hotel/Lodging Employee Recruitment', 'Hotel/Lodging Tax Employee Recruitment', 'Incidentals Employee Recruitment', 'Meals Employee Recruitment', and 'Meals Employee Recruitment - First/Last Day'. The last two items are enclosed in a yellow rectangular box.

2. Meals -Domestic (Travel prior to 1.1.24) should only be used for guests who traveled in 2023 or earlier.
3. Add Meals Employee Recruitment – Flat Rate First/Last Day is 75% of the \$59.00 flat rate per diem. It will be \$44.25.

4. The example below shows the expenses added PER DAY. First/Last day \$44.25 and Full day \$59.00.

Payment Type	Expense Type	Vendor Details	Date	Requested
Out of Pocket	Meals Employee Recruitment - First/Last Day	San Luis Obispo, California	01/12/2024	\$44.25
Out of Pocket	Meals Employee Recruitment	San Luis Obispo, California	01/11/2024	\$59.00
Out of Pocket	Meals Employee Recruitment - First/Last Day	San Luis Obispo, California	01/10/2024	\$44.25

5. If any meals were hosted and paid for by the University, those meal amounts would need to be deducted from the daily per diem based on the [GSA M&IE Breakdown](#). Concur does not do the meal breakdown, you will need to calculate and add the correct meal per diems (if any) for the guest.

M&IE Breakdown

M&IE Total ¹	Continental Breakfast/ Breakfast ²	Lunch ²	Dinner ²	Incidental Expenses	First & Last Day of Travel ³
\$59	\$13	\$15	\$26	\$5	\$44.25

Example: A faculty member hosted lunch and dinner on the 2nd day for the guest (and paid with their Concur card so they will expense as Hospitality on their own Expense Report). Use the chart above or on the [GSA website](#) to reduce the per diem for that day.

$\$59 - 15 - 26 = \18 per diem total for breakfast and incidental. You would add the meal per diem on the expense report with comments as below:

← → **Meals Employee Recruitment \$59.00**

01/11/2024

Details Itemizations

Allocate *

Expense Type *
Meals Employee Recruitment

Transaction Date * 01/11/2024 City of Purchase * San Luis Obispo, California

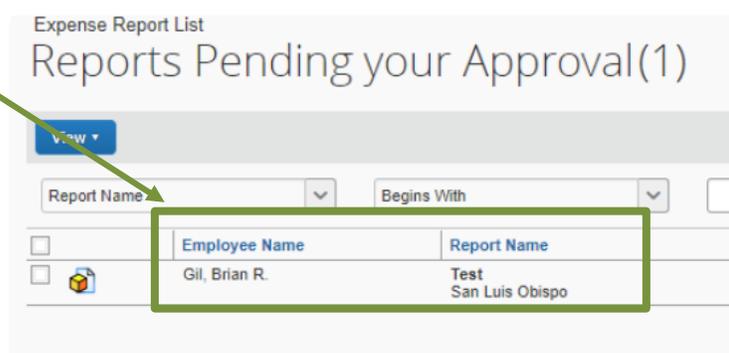
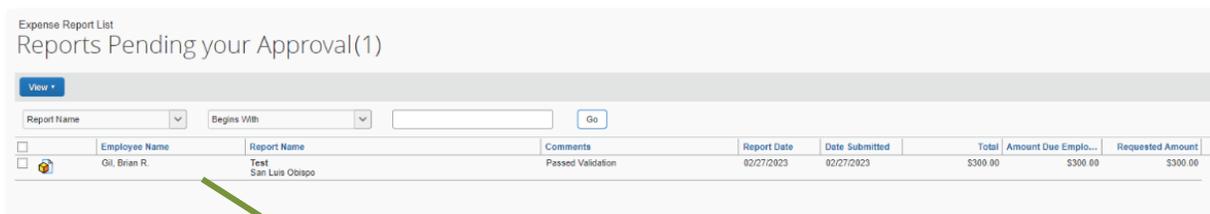
Payment Type *
Out of Pocket

Amount * 18.00 Currency * US, Dollar (USD)

Comments To/From Approvers/Processors
Lunch and Dinner hosted by faculty

APPROVING

1. The approval process for guests' travel expense reports follows the approval (budget and manager) of the person submitting the Expense Report on behalf of the guest.
2. A travel REQUEST is NOT required for guest travel and travel expenses.
3. Guest travel expenses can be paid in one of two ways.
 - a. Concur Travel Card held by the employee.
 - b. Guest pays directly and submits receipts for reimbursement.
4. Concur card and guest out of pocket expenses are submitted on one Concur Expense Report.
5. Approval reviews for accuracy and travel compliance.
6. The Approver receives an email notification from Concur that there is a new Expense Report to review and approve.
7. Approver opens the approval queue to view the Expense Report. The employee's name is listed, and the Report Name should have the guest information. The guest's name is not listed or shown on the Pending Approval Page.



8. Approver needs to open the Report Header to view the guest's name. Then the approver can go to the report to review all expenses, receipts, documents for the guest travelers and APPROVE or SEND BACK TO USER for corrections.

Report header for: Test

[Previous Comment](#) [View All](#)
Entered By Concur System: Passed Validation

Policy *CSU-Non-Employee Expense I	Report Key 64423	Report Id 54276BF
Non-Employee Name (SLCMP-0000053820) PENG,NICO		
Report/Trip Name Test	Trip Type 1-In-State	Traveler T Non-Emp

[Send Back to User](#) [Approve](#)