Non-Employee guest travel is defined as a guest visiting the University and their travel expenses will be paid by a campus department. A Vendor 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 guests 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 GUEST VISIT

ONE TIME ONLY
1. If you do not have a Concur Travel Card, complete the application (LINK) 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 to request BOOK FOR A GUEST access on their Concur Travel Tab. Subject Line: “Book for a Guest”

FOR EACH GUEST VISIT
3. Complete “Add Non-Employee to Concur” form (LINK) for guest to be added to Concur for expense report and any reimbursement.
4. For local hotel booking, download the Credit Card Authorization Form (LINK)

BOOK 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 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, car rental and hotel in the guest name.
2. Select the From and To Airports. CHECK 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. When selecting a BANNED STATE for travel To/From a new Warning will appear after hitting SEARCH. Please review then hit Continue to continue with the reservation. Justification is only needed for travel TO a banned state, disregard if traveling FROM a banned state.
4. Select Flight – non-refundable is OK when booking in Concur.

5. After selecting your Fare Option, you will be directed to a new screen to ENTER TRAVELER INFORMATION
6. 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.

7. Final 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.

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

BOOK CAR RENTAL

1. Use the Travel site link and directions to reserve a rental car for a guest (single sign on required)  
2. Contact the Poly Travel office for the required PIN number if you do not have it. (Admins only)

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

5. Changing the Policy will add a few fields to the Report Header.

**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.

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.
6. 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.

   NEW Traveler Type: Non-Employee
   NEW Trip Purpose Employee Recruitment/Interview

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

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. There is also a section to add COMMENTS To/From Approvers.

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

**Adding Expenses to the Report**

There are various 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.

**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)

1. 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. 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.

Concur Non-Employee (Guest)