



Visiting Guest Travel & Concur

When should a Request for a Guest be submitted in Concur?



A Request will only need to be submitted for a guest if an arranger will be reserving air, hotel, etc. for a visiting guest using a university card (either the UTravel Airfare card or a Travel Card).



If no expenses for the visiting guest will be charged to a university card, a Request does not need to be submitted



To reimburse a guest for out of pocket expenses, use the Guest Travel payment type in ePR (Coming November 2020!).

Submitting a Request for Guest Travel



Note: Do not submit the Request until you make certain that the first, middle, and last name is identical to those on the photo identification the traveler will be presenting at the airport. Due to increased airport security, the traveler may be turned away at the gate if the name on the identification does not match the name on the ticket.

- Open Request.
- Select New Request.
- Give a descriptive Trip Name.
- Fill in all required fields.
- Guest travel arrangements for airfare can be made with the University CBT Agents. Select Yes if you would like them to contact you to book travel.
 - This option might be preferred so guests are not out of pocket for airfare.
- Under Traveler Type, select Guest.
- Fill in the Guest Name fields.
 - A first and last name are required.
 - The CBT Agents will work directly with the travel arranger to get the rest of the info needed to make a reservation.
- Select option #2 under “How will you reserve air, car and/or hotel?” since the Concur booking tool cannot be used to reserve guest travel.

Request Header			
*Request/ Trip Name	*Request/ Trip Business Start Date	*Request/ Trip Business End Date	*Destination City
*Destination Country	Main Destination Risk Level	Highest Location Risk Level	
*Trip Type	*Request/Trip Purpose	*Traveler Type	*How will you reserve air, car and/or hotel?
Do you want a CBT Agent to assist you with a quote/reservation?			
Guest First Name as it appears on Gov't Issued ID	Guest Middle Name as it appears on Gov't Issued ID	Guest Last Name as it appears on Gov't Issued ID	
Additional trip Purpose Information		Comments To/From Approvers/Processors	

Submitting a Request for Guest Travel

- Fill in the Segments tab.
- If you selected Yes under “Do you want a CBT Agent to assist you with a quote/reservation?” on the Request Header, use the Segments tab to provide desired flight info and comments to the CBT Agents.
- Submit the Request.
- The Request will need to be approved by the arranger’s supervisor (Coming soon!).

Request Header Segments Expenses Approval Flow Audit Trail

Add Segment

CLICK ICON TO CREATE SEGMENT

Air Ticket ☒ Round Trip ☐ One Way ☐ Multi-Segment Amount : USD

Outbound

From:

To:

Date: Depart at

Comment: Use the Comment boxes to provide info to the CBT Agents. For example, please select a flight as close to 1PM as possible. The traveler has requested this.

Return

Date: Depart at

Comment:

Save **Cancel**

Submitting an Expense Report for Guest Travel

To begin an expense report, locate the Request and click the Expense link (on the right).

Fill in all required fields on the expense report.

Add all charges incurred for the guest to the Expense Report from the Available Expenses and eReceipt area.

Submit the report as usual.

*Note: an Expense Report will need to be submitted for a guest if an arranger has paid for air, hotel, etc. for a visiting guest using a university card (either the UTravel Airfare card or a Travel Card).

Expenses charged to a TCard are expensed by the cardholder on an expense report in Concur. Since the arranger has no out of pocket expenses to add to the expense report, a \$0.00 voucher is created to allocate all expenses and reconcile the charges from the TCard.

To reimburse a guest for out of pocket expenses, use TR-Non-Employee Travel Payments in ePR.



Guests and Int'l Travel

The following information is from the Office of Global Engagement (OGE) and applies to guests that are travelling to an international location on behalf of the university, or as part of a University of Utah group.

If a non-University member traveler is a recognized participant in a University of Utah activity abroad (academic or business-related) they are eligible for University international insurance, but not required to enroll. (Enrollment is required for all University members.)

Based on this understanding, non-University member travelers should be provided the University insurance self-enrollment so they have the opportunity to enroll if they choose.

Student programs in international locations are recognized differently.

The University works to ensure that all travelers associated with student programs abroad are properly enrolled in University insurance coverage.

This applies to all student participants, all faculty-leaders and travelling program staff, and in turn any additional non-University member travelers accompanying the group in any capacity.

***Note:** Arrangers that submit a Request to an int'l location on behalf of a guest will receive emailed info about CISI insurance.

Guest Travel Options

Guest books and pays on their own credit card

Guest self-books their own travel arrangements.

The guest uses a personal CC.

Traveler submits receipts for reimbursement to dept.

Dept submits a payment request in ePR (use TR-Non-Empl Travel Pymt type).

Guest receives reimbursement.

Dept arranger books using TCard

Travel arranger uses a dept TCard to make travel reservations for a guest.

The arranger uses a dept TCard.

The TCard transactions are automatically imported onto the arranger's Concur profile for reconciliation.

The arranger submits an expense report in Concur.

All TCard charges are allocated according to the chartfield(s) used on the expense report.

Dept uses University CBT Agents to book

Travel arranger uses the University CBT Agents to book reservations for a guest.

The university's corporate airfare card is charged.

The TCard transactions are automatically imported onto the arranger's Concur profile for reconciliation.

The arranger submits an expense report in Concur.

All charges are allocated according to the chartfield(s) used on the expense report.

Travel Card Use & Visiting Guests



Travel Arrangers are encouraged to obtain and use a Travel Card (TCard) to book travel arrangements for staff, faculty, students and visiting guests.



Staff and faculty are also eligible to obtain a TCard upon approval from their supervisor.



TCards can be used (where appropriate) so that guests are not out of pocket for travel expenses and the traveler isn't troubled by submitting expense reports.

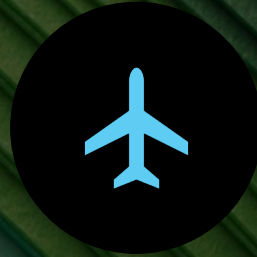


Expenses charged to a TCard are expensed by the cardholder on an expense report in Concur. Since the arranger has no out of pocket expenses to add to the expense report, a \$0.00 voucher is created to allocate all expenses and reconcile the charges from the TCard.



To reimburse a guest for out of pocket expenses, use the payment type Non-Employee Travel Pymts in ePR. Reimbursements payable to visiting guests will not go through Concur.

General Travel Card Benefits



ARRANGERS CAN USE THEIR TRAVEL CARDS TO MAKE ARRANGEMENTS ON BEHALF OF A TRAVELER, SO TRAVELERS ARE NOT OUT OF POCKET FOR AIR, OR HOTEL, ETC.



CHARGES MADE ON AN ARRANGER'S TCARD COME ONTO THEIR PROFILE IN CONCUR AND CAN BE EXPENSED WITHOUT TROUBLING THE TRAVELER.



AS SOON AS AN EXPENSE REPORT IS COMPLETED IN CONCUR, THE TRAVEL CARD CHARGES ARE RECONCILED AND APPEAR IN MANAGEMENT REPORTS. NO FURTHER RECONCILIATION IS NEEDED.