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Traveler FAQ

What are some general tips I should know about Concur and travel in general?

Please visit One-Stop Financial Services main travel page and Concur Travel resource page for access to a range of travel resources and Concur training materials:

<https://www.calstatela.edu/finance-onestop/travel>

<https://www.calstatela.edu/finance-onestop/concur-travel>

The following documents can help you get started:

- The *Travel Planning Checklist* can help you navigate the requirements for domestic travel and submitting a travel request.
- The *Expense Report Checklist* can help remind you of what to include in your travel expense report.
- The *Definition Sheet* includes a glossary of Concur terms.

Where can I find the CSU's travel policy?

The link to the CSU's travel policy can be found at the One-Stop Travel Services travel webpage:

<https://www.calstatela.edu/finance-onestop/travel>

What should I do the first time I log into Concur?

Review your profile for completeness and accuracy.

I see in my profile that my email domain is @cslanet.calstatela.edu instead of @calstatela.edu. Will I still be able to receive Concur emails?

Your email may be registered with either domain and it will not affect how emails are received in your email inbox.

Concur is displaying my last name twice. Is this an issue and how can I fix it?

You can remove your last name from the Preferred Name field to resolve the name display issue (go to Profile Settings > Personal Information). Your Preferred Name should not affect your ability to book travel through Concur.

Please note that all other name fields should be accurate and match your government-issued ID. If incorrect, please contact Human Resources Management to update your legal name.

Do I need to submit my Travel Request prior to booking my travel?

Yes, you must first submit a travel request and have it approved prior to booking your travel.

Do I need to have a Travel Request already approved in Concur before submitting my expense report?

A travel request will need to be submitted and approved before an expense report can be submitted.

When should I submit my Travel Request and Expense Report?

Your Travel Request should be submitted preferably 30 days prior to the start of your travel, but please refer to your own department's requirements.

Your Expense Report should be submitted after your last day of travel and within 60 days of your last day of travel.

What should I do if an expected expense falls outside of the CSU travel policy (e.g., lodging over \$333 per night)?

Any exception to the travel policy will need to be approved by your division VP. If your division uses an exception justification form, be sure to complete and attach the form to your travel request. If not, your budget approver will need to add the division VP to the Concur approval workflow to review your justification comment required in your Concur travel request.

Note: Travelers who attend an approved conference where the prearranged conference group/lodging rate exceeds the \$333 per night limit may stay at the conference hotel without additional approval for the prearranged conference group rate. Documentation to substantiate the prearranged conference group/lodging rate must be provided as part of the Travel Request.

What is the purpose of the Reduction expense type?

You can use the "Reduction" expense type for different reasons, but one common scenario is when a campus department is only willing to pay a specified amount and the traveler has agreed to be responsible for the remaining balance. Make sure to include a minus sign (-) when inputting the amount.

How do I know where my submission is in the process?

You can obtain real-time information about where your submission is in the process flow. For requests, choose the "Request" tab and review status of each request listed. For expense reports, choose the "Expense" tab and you will see the status noted on the expense reports tile. Statuses include:

- **Not submitted** – awaiting submission by traveler.
- **Pending cost object approval** – awaiting minimum signature authority defined by campus.
- **Pending "Reports To" approval** – awaiting appropriate administrator/reports to approval.
- **Approved** – all necessary approvals obtained.
- **Sent back to user** – when a travel request or expense report is sent back for correction or missing information. After corrections are made (either by the traveler or their delegate), the transaction must be submitted again by the traveler for another cycle of review/approval.
- **Pending accounting review** – expense report is in queue for One-Stop's review.
- **Sent for payment** – when One-Stop's review is complete and it has been forwarded to the Controller's Office for payment processing.

I received the following warning message when submitting my travel request/expense report: *A Vendor ID is not specified on your profile.* What should I do?

This is a soft stop warning for a travel request, but a hard stop for an expense report. Contact One-Stop Travel Services at travel@calstatela.edu to resolve the issue.

Note that you can still submit your travel request for approval, but you will not be able to submit your expense report until the issue is resolved.

Will someone else be able to create my Travel Request and Expense Report for me?

Yes. A delegate can create requests and expense reports on a traveler's behalf. The delegate can create the reports, but the traveler is required to submit the request or expense report. The submission process fulfills the signature step.

Will someone else be able to make my travel arrangements for me?

Yes. You can assign access in your profile to as many travel arrangers as you need. Go to your Profile and either scroll down the page to the "Assistants and Travel Arrangers" section, or click "Assistants/Arrangers" from the My Profile menu on the left side of the page. Click Add an Assistant to add the person whom you would like to authorize to book your travel. This person can update your profile and make any travel arrangements for you. Check the box to set as someone who can book travel. Arrangers or assistants must have their own login.

Do I have to book my flight through Concur Travel?

You are not required to book a flight via Concur. However, Concur does have special airline rates (specifically with Southwest) and your department will be directly charged when you book through Concur.

What if I book outside of Concur Travel? How do I get reimbursed?

By not booking through Concur, you will lose some of the efficiencies and negotiated rates that the system provides.

An expense report can be initiated from an approved request and submitted to obtain reimbursement.

Am I allowed to book an AirBnB (or similar short-term rental)?

Yes, an AirBnB (or similar short-term rental) falls under the same travel policies as a hotel. However, if you are booking an AirBnB for more than just yourself, and the shared lodging is going to be over the maximum nightly room rate, you will still need to include an exception justification in your travel request.

Note: Travelers who attend an approved conference where the prearranged conference group/lodging rate exceeds the \$333 per night limit may stay at the conference hotel without additional approval for the prearranged conference group rate. Documentation to substantiate the prearranged conference group/lodging rate must be provided as part of the Travel Request.

What if I need to cancel or modify my trip?

All travel arrangements must be canceled by the traveler.

If travel was booked directly through Concur, you will need to contact CSU's travel agency, Christopherson Travel for changes to your travel reservations. Contact information can be found on the Concur home page.

What do I need to do to receive reimbursement as a direct deposit?

Contact One-Stop Financial Services at 1stopfinancial@calstatela.edu to initiate the process.

Can I allocate my travel expenses to multiple chartfields?

The Allocations feature allows you to allocate selected expenses to multiple chartfields by percentage or by amount. See the Expense Report guide for detailed instructions.

I am unable to submit my expense report due to the pop-up alert: *This report contains at least one itinerary with a single itinerary row. An itinerary is not valid until it has at least two rows. Please add another row to complete the itinerary.*

The issue is due to the travel itinerary that is required to calculate your location-based per diem for meals & incidentals. More than likely only one travel stop was added for the entire trip when there should be at least two stops: 1) departure and arrival on the first day and 2) departure and arrival on the last day. Editing the itinerary should fix the issue. You will also need to go to the Expenses and Adjustments tab to recalculate your meals per day by indicating any breakfast/lunch/dinner meals that were provided.

My after-the-fact travel request was just approved, but I am still unable to submit my expense report due to *Vendor/Supplier ID* alerts.

This is a common error when a traveler immediately submits an expense report on the same day their after-the-fact travel request has been approved. It is recommended to wait a day or two before submitting the expense report since the vendor ID set up is an overnight process.

Please note that the alert message will not automatically disappear on the expense report. A workaround for this is to go into the details of an expense line item and click "save" again and that should reset/remove the alert.

What is a GET card and how do I apply for it?

Some departments are allowing for their travelers to request a University-issued travel card, called the GET (Golden Eagle Travel) card, to avoid out-of-pocket expenses.

Contact your Resource Manager if you are interested in applying for your own GET card.

I received a credit/refund on my GET card. How should I reconcile this in Concur?

Please include all card transactions on the expense report, including travel card refunds.

I have a different question related to Concur or travel in general. Who should I contact for help?

Please contact One-Stop Travel Services at travel@calstatela.edu or (323) 343-5430.

Delegate & Approver FAQ

I have been assigned as a delegate for someone, but I am unable to access certain information on Concur.

You might not have been set up with the correct delegate profile. Please refer to the Definition Sheet for a description of all possible delegate permission settings. The Definition Sheet can be found at the One-Stop Travel Services travel webpage: <https://www.calstatela.edu/finance-onestop/concur-travel>

My supervisor received a notification to approve a travel request/expense report even though the request was initially sent to me. What happened?

An Approver MUST approve or send back a Concur travel request/expense report within 10 calendar days of receiving the request for approval. If an Approver does not act on the request within this timeframe, it will be automatically forwarded to the Approver's direct supervisor for approval.

Why am I not seeing email notifications to approve requests in Concur even though I am signed up for email notifications?

Please check your junk mail if you are not seeing email notifications regarding Concur approval requests.

How can I manually add an additional approver into the workflow for a travel request/expense report?

If you are a Budget Approver (or their delegate previewer), you can add additional approvers anywhere in the workflow. Before clicking *Approve*, select *More Actions > Edit Approval Flow > + Add Step*.

Please note that if you are an approver, but not the designated Budget Approver, you only have the ability to add an approver, but cannot manually insert them anywhere in the workflow.

Location-Based Per Diem for Meals & Incidentals FAQ

Will Concur automatically calculate location-based per diem for M&IE?

Yes. Concur travel requests auto-calculate M&IE based on the destination and travel dates. It also will automatically reduce for the first and last day of travel to 75% of the per diem value. Concur expense reports offer the same options.

On the Concur expense report, I do not see an option to add M&IE location-based per diem.

You will need to create a Travel Allowance Itinerary as part of your Concur expense report (this is not required for a Concur travel request).

1. On the Add Expenses page, click Travel Allowance > Manage Travel Allowance.
2. Click Create New Itinerary (or Import Itinerary, if applicable).
3. Enter your travel stop details (departure to arrival & arrival to departure).
4. Mark any specific meals that were provided on your trip which will automatically be deducted.

Meals and incidental expenses will then automatically be added to your Concur expense report.

On the Concur expense report, I am unable to move past/edit the Expenses & Adjustments screen when creating a Travel Allowance for location-based M&IE.

You likely have more than one "open" expense report for the same travel dates which is causing the 2nd expense report to be "locked" since you cannot claim per diem twice for the same dates of travel. Deleting the unused/alternate expense report should fix the issue.

Are tips for meals & hotel staff separate from the daily per diem?

Tips for meals and hotels are included in the Meals & Incidental Expense (M&IE) per diem.

How do you determine which rate to use when on a multi-city trip?

The location where the traveler spends the night determines which rate to use.

How do I fill out my expense report for M&IE per diem if I used the GET travel card to pay for meals on my trip?

There is no need to manually reduce meals charged on the travel card. The system will automatically deduct from the total per diem amount. It will not be reflected on the Expenses page, but can be reviewed by going to Report Details > Report Header for the breakdown of what is owed to the employee vs. university. You will either receive the remaining balance of the per diem or you will have to pay back the University if the amount spent is over the per diem.

Note: For Athletics, please refer to the [Athletic Group Travel](#) policy which complies with NCAA rules.

Are meals reimbursable for a one-day trip (less than 24 hours)?

No. Meals are only reimbursable if they have met the sleep or rest rule according to the travel policy.

Which per diem rate should I use if my conference is in one city, but my hotel is in another city with a different rate?

It will depend on the situation and what your approvers will allow. Reach out to your Resource Manager for guidance.