

Table of Contents

Traveler FAQ.....	1
Delegate & Approver FAQ.....	4
Location-Based Per Diem for Meals & Incidentals FAQ.....	5

Traveler FAQ

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

Please visit One-Stop Financial Services’ general 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 Financial 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.

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

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

A travel request will still 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 preferably 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.

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:

Travel Request Statuses:

- **Not submitted** – awaiting submission by traveler.
- **Submitted, pending "Reports To" approval** – awaiting appropriate administrator/reports to approval.
- **Pending cost object approval** – awaiting minimum signature authority defined by campus (for requests).
- **Approved** – all necessary approvals obtained.
- **Sent back to user** – when a travel request 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.

Expense Report Statuses:

- **Pending budget approval** – awaiting budget approval.
- **Pending accounting review** – expense report is in queue for One-Stop's review.
- **Sent back to user** – when an 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.
- **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 Financial 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.

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

Please contact One-Stop Financial 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 Financial 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.

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.
5. 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?

If any meal amounts are placed on the GET card, the value of the meal will need to be reduced during the expense claim process. 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.