Reimbursing Guests in Concur

**Purpose:** This document describes the steps needed to complete a travel request and expense report on behalf of a traveler who is not an FSU employee.

**Before entering guest travel, the user should be familiar with navigating Concur, entering travel requests and entering expense reports.**

Expenses can be entered in Concur for individuals who are not University employees. The following are examples of Non-Employee payments:

- A student who will be reimbursed for out-of-pocket expenses while attending a conference
- A job candidate who will be reimbursed for expenses incurred while traveling to the University for interviews

In these examples, since the payees are not University employees. You must complete a Guest ID Form and have a Guest ID number issued.

**Important to note:** Travel reps do not act as a delegate to enter guest travel. Guest travel is entered under the travel rep’s own profile.

**Enter a Travel Request for a Guest Traveler:**

1. On the Concur home page in your own profile, on the Quick Task Bar, place your mouse pointer over New, and then click **Start a Request**.
2. In the request header, the Traveler Type must be **Guest**, and you must fill in the **Guest ID** and **Guest Address** fields. Use the Guest Address field to confirm the check will go to the right address and that you have the correct guest traveler.
3. Complete the header with required information pertaining to the guest’s travel.
4. Pay particular attention to funding information (department, fund, PCBU, etc.), as it is pre-populated with the **Travel Rep’s** accounting defaults.
5. Complete segments and expenses screen in order to encumber funds for the guest’s travel.
6. Submit guest travel request for approval.
Enter an Expense Report for a Guest Traveler

1. Create an expense report from the approved travel request.

![Create a New Expense Report](image)

2. Click the box labeled **Guest Expense Reimbursement** (an audit rule will be triggered if this box is not checked. The combination of Traveler Type (Guest), Guest ID and Guest Address fields, and the Guest Expense Reimbursement check box is what ensures payment goes to the guest traveler identified on the expense report.

3. As with all expense reports, select yes or no for “**Will be the last report for this request?**” field.

4. **Click Next.**

5. Even if you are planning to pay the guest traveler’s meal allowance, select No.

![Travel Allowances](image)

6. Concur will advance to the Expense Types.

7. Type Guest into the Expense Type search box. The expense type “**Guest Daily Meal Allowance**” will appear as an option. Select this expense type.
8. Complete one Guest Daily Meal Allowance expense line for the trip. State of Florida meal allowance is the same for guests as for employees. Those rates are $6 for breakfast, $11 for lunch, $19 for dinner, domestically. Foreign meal rates will vary by location.

9. In the comment box, elaborate on what meal allowance is being paid.

10. Add additional expense lines for per diem and out of pocket reimbursements the guest traveler is entitled to.
Entering Travel Card Charges made on behalf of a Guest Traveler

Travel Reps frequently book travel with their t-card on behalf of guests. In order to associate these charges with the guest’s trip, the travel rep must list the guest traveler as an attendee for any expense line created on behalf of the guest. You may include these charges on the guest traveler’s expense report.

1. From the Manage Expenses screen, click **Import Expenses**.

2. Select the expenses associated with the guest’s trip and click **Move** to add them to the expense report.

3. Select the travel card expense and click on **Advanced Search**.
4. Choose Attendee Type "Guest".
5. Search for your guest by last name and first name. If the guest’s name does not appear, click **New Attendee**.

![Search Attendee Screen]

6. Select the attendee type “Guest” and enter your traveler’s last name and first name. Click **Save**.

![Add Attendee Screen]
7. The guest traveler’s name will be associated with that expense line, however, the line is paying the travel card.

8. Click **Save** to complete the expense line.

**Obtaining Guest Signature/Review**

1. Once all expense lines are entered, Click on **Print/Email** and select “*FSU-Guest Detailed Report with Audit & App flow*”

2. Print or email the report to the guest traveler for their signature. Docusign or other secure e-signature is acceptable.
3. When you’ve received the signed expense report, attach it in Concur by opening the expense report, clicking Receipts and selecting Attach Receipt Images.

4. Once the signed expense report is attached and all audit rules are cleared, you may submit the expense report for approval.