

MSU Concur Group and Guest Guide Requests and Expense Reports

Processing Request and Expense Reports in Concur for group and guest travel entails specific processes that are different from typical MSU travel Request and Expense reports. This guide covers items relevant to both Requests and Expense Reports and assumes that you are already familiar with the functionality of those processes. Additional training resources are located at Travel@State>[Education](#) page.

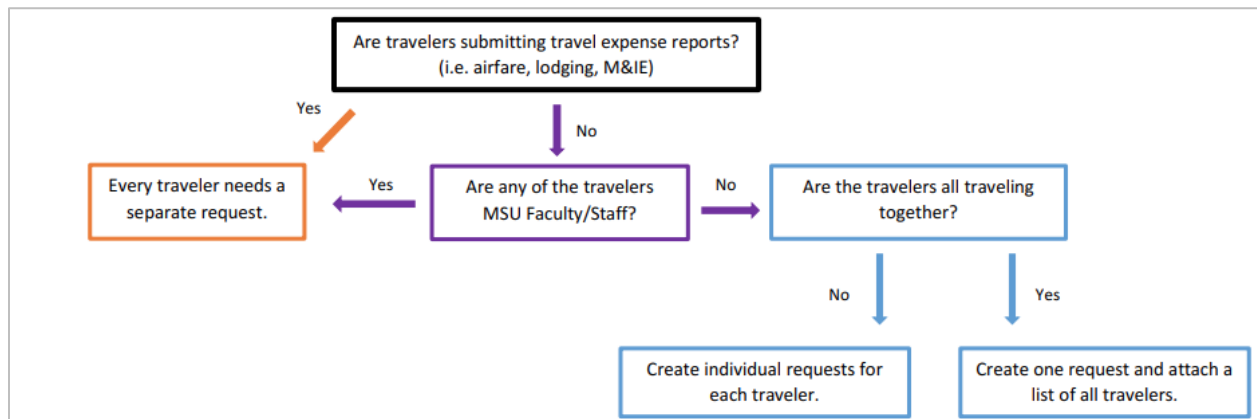
Profiled travelers are all MSU employees, including student employees. Guests and students are processed as non-profiled travelers in Concur.

Requests

Groups

Deciding whether you need individual Requests or one Request with a listing of travelers is a first step. Exhibit 1 will assist you with this step. [Group Travel Request Guidance](#)

Exhibit 1

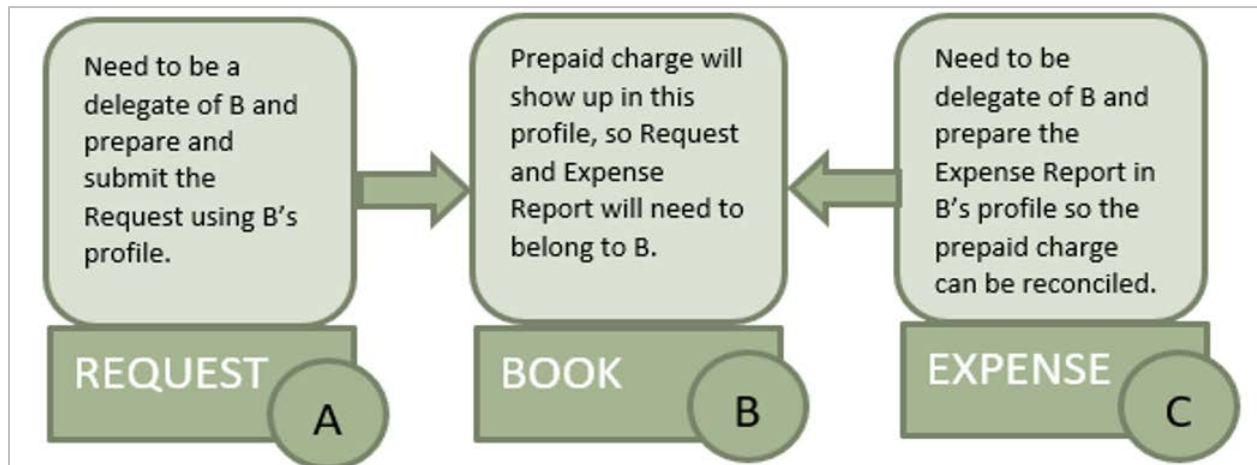


If a group is traveling together and separate Requests are not needed according to Exhibit 1, a list of travelers can be added to either the chief of party's* profiled traveler Request or to one of the guest's non profiled Requests. Remember not to include any sensitive information on the list.

Group/Guest

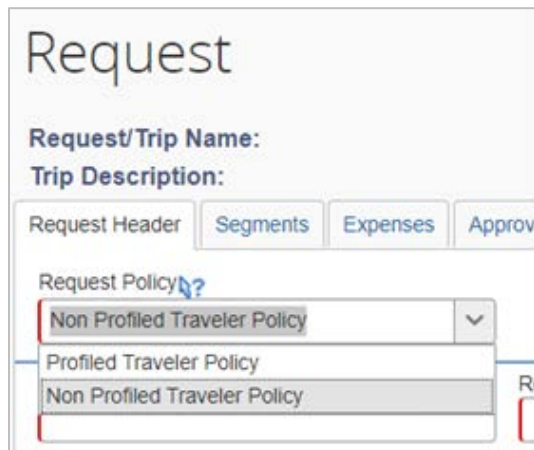
1. Determine who should prepare/submit the Requests for the non-profiled travelers. Different employees within a unit often perform the Request, Travel Booking, and Expense Report functions. This can pose problems due to prepaid charges being placed in the profile of the person who books the travel in Concur. Use delegates to accomplish this and think in advance about who “owns” the Request. Exhibit 2 will assist with this decision.

Exhibit 2



2. Most of the functionality of the Request for a guest will be the same as that of a profiled traveler. A major difference is the use of the **non-profiled traveler policy** choice. This is done in the first field of the Request Header by using the Request Policy drop down box and choosing “Non-Profiled Traveler Policy” (see Exhibit 3). Choosing “Non-Profiled Traveler Policy” informs Concur that you are NOT traveling. In the event of a reimbursement situation on the Expense Report (page 6), it determines who gets paid – you or the guest.

Exhibit 3



3. Since guests do not have access to Concur, they are not able to **submit** a Request. You will be doing it for them and “attesting” to the accuracy. You would also receive duty of care and Trip-It email and text notifications since you are processing in your Concur profile.

Expense Reports

The majority of differences in processing guest travel occurs during this step. The main differences relate to using itineraries and hotel Expense Types which are discussed below.

Guest

1. **Receipt Management** – Because you are processing guest travel in your profile, the same options for receipt management are available to you as they would be if you were traveling yourself. You may use the Concur mobile app to forward receipts to receipts@concur.com, or by using the Expenselt function to deliver receipts into your profile for attaching to an Expense Report.
2. **Itinerary Issue** – In typical MSU travel, an itinerary is required if there will be per diems and/or lodging on an Expense Report. Concur does not allow for overlapping itineraries. Since you are processing guests in **your** profile, Concur will only allow travel once on a specific date. This means that if you or another guest are traveling on the same date(s) you will be unable to use the itinerary feature. Instead, you will use specific Expense Types that have been set up for this purpose. See Exhibit 4



Exhibit 4



A. **Guest Daily Meal Per Diem Allowance Expense Type** – since the itinerary function is what Concur uses to automatically calculate per diem amounts, you will need to use the appropriate charts (links on page 6) to determine the amounts or use the amounts from another exact per diem calculation from another traveler.







For each travel date, you can use the Meals Provided drop down box to choose the meals provided or choose the “Custom – use comment box” option and then add specific dates and amounts in the Comment field. An image of the page used to determine the rates can be attached as the receipt. See Exhibit 5:

Exhibit 5

Details		Itemizations	
 Allocate * Required field			
Expense Type *			
<input type="text" value="Guest Daily Meal Per Diem Allowance"/>			▼
Transaction Date *		Meals Provided	
<input type="text" value="12/01/2021"/> 		<input type="text" value="Custom - use comment box"/>	
Additional Information			
<input type="text" value="Daily for Dec 1 & 2, 2021"/>			
Lodging Location		Payment Type *	
<input type="text" value="East Lansing, Michigan"/>		<input type="text" value="Out of Pocket"/>	
Amount *		Currency *	
<input type="text" value="80.00"/>		<input type="text" value="US, Dollar"/>	
Comment			
<input type="text" value="Full day December 1. Lunch (\$16) removed for December 2. Each day is a travel day - \$48."/>			

B. **Guest Hotel** – since the itinerary/itemize function is what Concur uses to automatically check for the maximum lodging rate you do not need to itemize. For foreign and OCONUS locations only, check the appropriate charts (see page 6) and if the maximum lodging rate has been exceeded note the reason in the “Allowance Exceeded Reason” field or the “Comment” field. CONUS locations do not need to have this checked. Confirm that the correct currency is listed and selected. See Exhibit 6:

Exhibit 6

Details		Itemizations	
 Allocate * Required field			
Expense Type *			
Guest Hotel			▼
Hotel location detail * 		Transaction Date *	
International		01/03/2022 	
Additional Information		Allowance Exceeded Reason 	
		Conference Hotel	
Vendor * 		City of Purchase *	
Choice Hotels International		 ▼ Dublin, IRELAND	
Payment Type *			
Out of Pocket			▼
Amount *		Currency *	
326.24		US, Dollar	
<input type="checkbox"/> Personal/Non Reimbursable			
Comment			
For safety reasons conference hotel was chosen. Single night in hotel.			

Links to per diem/lodging rate charts:

The [General Services Administration](#) (GSA) establishes per diem rates for destinations within the Continental United States (**CONUS**).

The [Department of Defense](#) (DOD) establishes non-foreign (**OCONUS**) rates such as Alaska, Hawaii, Puerto Rico, and Guam.

The [State Department](#) establishes **foreign** rates (for example, Russia, Aruba, Bahamas, Europe, etc.).

Please see the related guide (in development) on how to look up and determining appropriate per diem and maximum lodging rates.

IMPORTANT:

4. Confirm that the Expense Report is being processed as a **non-profiled traveler**. This should copy over from the Request but you always want to double check. If there is a reimbursement associated with this Expense Report, and it is processed as Profiled traveler, it will pay YOU, not the guest.
5. With non-profiled travelers you have the option to indicate whether there will be a reimbursement associated with the Expense Report. When selecting “Yes”, you will then be required to **choose a vendor**. Pay special attention when selecting the vendor. The vendor must be [set up in KFS](#) prior to this . Review the vendors first in KFS so that you are selecting the correct vendor in Concur. Many vendors have the same or similar names, and you want the payment applied to the correct person.
6. Unlike Profiled travelers, guests do not have access to Concur, and are not able to **submit** their own Expense Report. You will be doing it for them and “attesting” to the accuracy.