Concur Travel Request Checklist

- ☐ Log into Concur (www.concursolutions.com).
- ☐ Go to "Requests", "New Request".
- ☐ Request Name Format: "Destination, Travel Dates":
  - – Example: Savannah, GA 8/9-11/21
- ☐ Purpose of Trip should indicate the name of event being attended.
- ☐ Add segments to Request:
  - ☐ Airfare, Rental Car, Lodging, Taxi, Per Diem, Miscellaneous, & Registration
    - - Taxi Segment includes Mileage and Ground transportation.
    - - Miscellaneous includes membership, parking, tolls, internet, etc.
  - ☐ Use Cost Comparison Calculator (Rental Car vs. Personal Car Mileage).
  - ☐ Airfare MUST be booked in Concur, please search within Concur for airfare rates.
    - – You may also call Travel Inc. for assistance in booking: 770.291.5190.
    - – Airfare should be booked 15-30 days prior to departure.
    - – Any exceptions to booking travel outside of Concur will need cost justification and approval by the Travel Department PRIOR to booking.
  - ☐ Hotel must be booked in Concur, unless receiving a special rate with the conference hotel.
  - ☐ Per diem is based on travel destination. Visit GSA.GOV for rates.
  - ☐ Registration & Membership will need to be paid out of pocket and then reimbursed.
    - - If reimbursed before the trip, it will be submitted through OwlPay. Work with Dept. Admin.
    - - If reimbursed after the trip, it will need to be added to the expense report in Concur.
    - - If Membership is requested for reimbursement, the Individual Membership Form is required.
- ☐ If personal time is being added to travel, the following is required:
  - - Airfare cost comparison print outs from Concur (the first page of each search):
    - - First comparison should show airfare for business days only.
    - - Second comparison should show airfare with personal days added.
  - - An approved and signed "Travel Authorization Request: Adding Personal Time Form".
- ☐ Add assigned Bus Op Specialist to the approval flow AFTER default approver.
  - – If a Request is returned for any reason, approvers must be re-added to the approval flow in the recommended order before submitting a second time.
- ☐ Correct speed chart number should be notated.
  - - If the speed chart number indicated is not the home department's, the appropriate approver must be added to the approval flow.
- ☐ Travel Request MUST be fully approved before booking.
- ☐ If trip is canceled, please let your assigned Bus Op know. We are not notified.
- ☐ Refer to the CHSS Travel website for more information.