Table of Contents

Group Travel Overview **2**

Role of the Group Leader 2

Booking Tips for Group Travel 2

Creating a Concur Travel Request/Expense Report for Group Travel **2**

Cash Advance for Student Group Travel **4**

Requesting a Cash Advance 4

Expensing a Cash Advance 5

Group Travel Overview

Group Travel most often occurs when an employee (known as the group leader) accompanies a group of students on a University-related trip.

Role of the Group Leader

A group leader is an employee who will be accompanying students on a trip. The group leader will submit **only one** Concur travel request and expense report on behalf of the students and themselves. If additional employees are also traveling, they will each need to submit their own individual Concur travel request and expense report.

Booking Tips for Group Travel

Concur's Trip Search booking feature is designed for individual employee travel. To book airfare for group travel, please contact Christopherson Travel Agency. Contact information can be found on the Concur dashboard under Company Notes. Note that there is a fee when contacting Christopherson for inquiries/booking arrangements.

If you are unsure of how to book travel arrangements for group travel, please contact One-Stop Travel Services at travel@calstatela.edu for assistance.

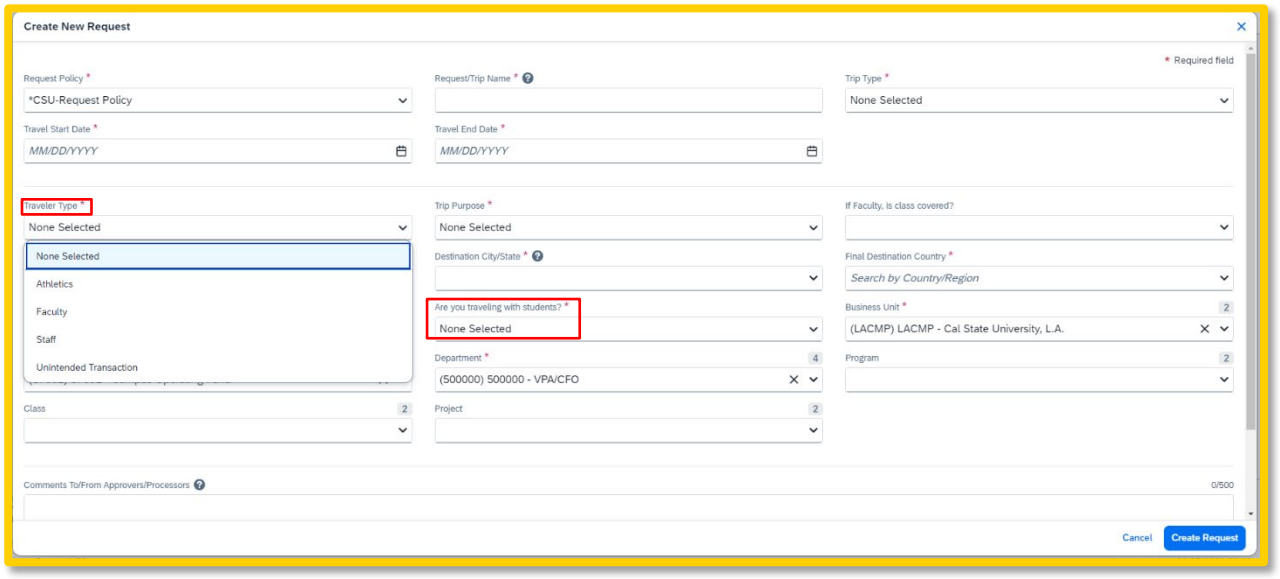
Creating a Concur Travel Request/Expense Report for Group Travel

The steps to create a travel request or expense report for Group Travel is similar to the standard process, with minor changes.

1. Start by creating a standard Travel Request Header.

2. If the group is a sports team, select **Athletics** for the **Traveler Type.** If not, select **Faculty** or **Staff**, whichever is applicable to the person accompanying the student group.

3. You will need to indicate **Yes** that you are traveling with students.



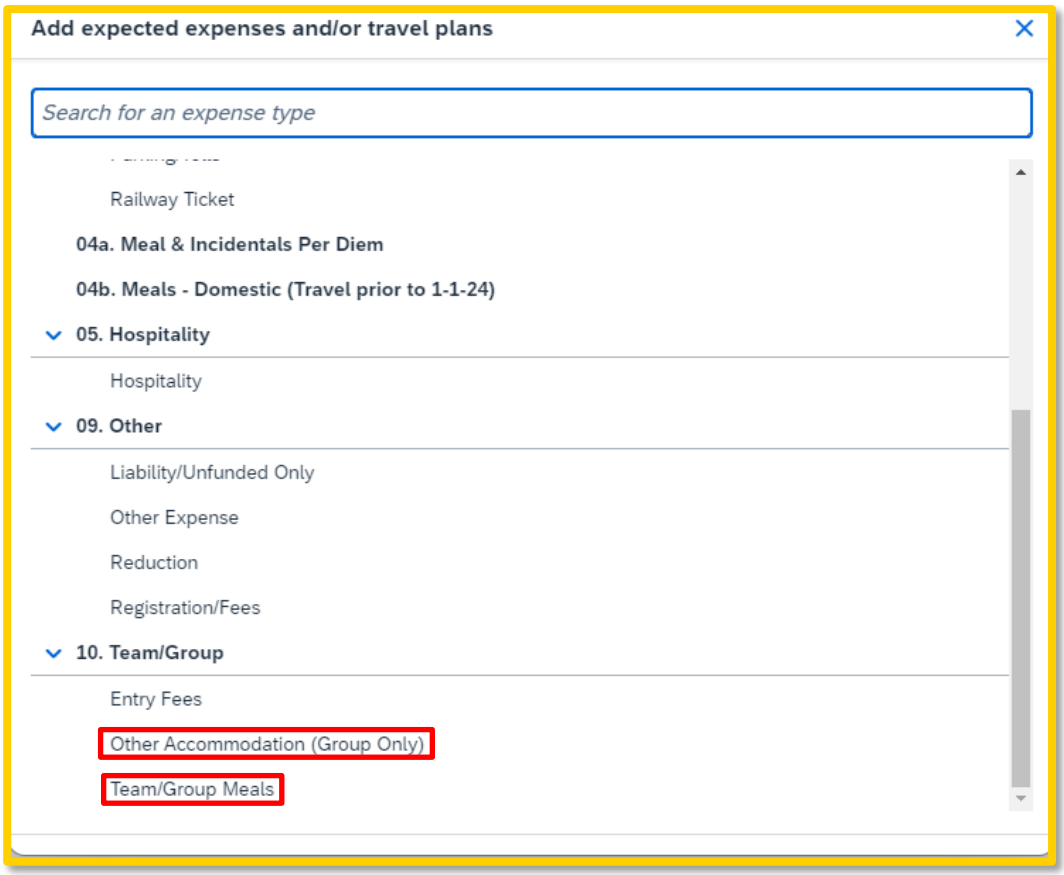
4. You will need to submit an Individual General Release Form or a Class General Release Form, found at https://www.calstatela.edu/ehs/risk-management-forms

5. Click **Create Request.**

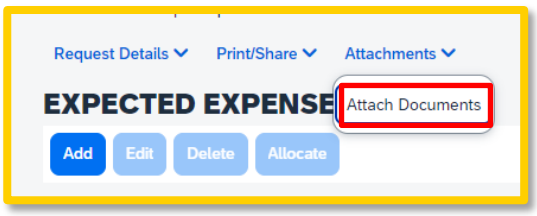
6. Add your Expected Expenses, with the following changes:

- **Accommodations:** To add the estimated cost of multiple hotel rooms or Airbnb rentals, select the **Other Accommodation** expense type, which will allow you to enter in the total for all rooms.

- **Meals:** To add the estimated cost of meals, select **Team/Group Meals**. Add the total estimated cost of meals for the trip.



7. After you've entered all Expected Expenses, attach your supporting documents under **Attachments.**



8. Submit your Travel Request.

Cash Advance for Student Group Travel

Cash advances will only be issued for group travel and exceptional cases. A cash advance can be made to the employee for students' per diem meals.

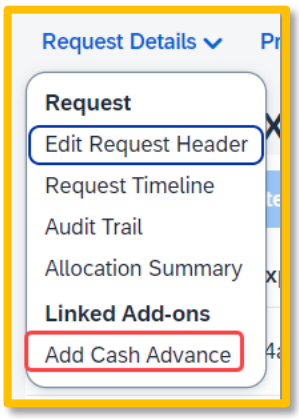
Cash advances will be issued no more than 10 days prior to the date of travel. There should be one cash advance per traveler at a time.

Requesting a Cash Advance

In order to be eligible to request a cash advance, an approved Cash Advance Setup Form needs to be submitted to One-Stop Travel Services. Your Concur settings will then be updated to reflect this option by your campus Concur Admin.

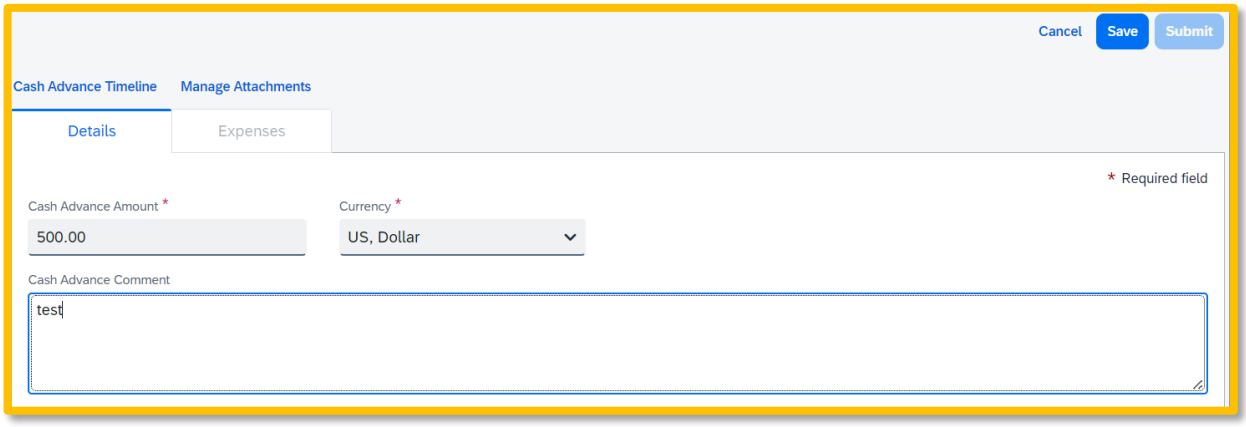
To Request a Cash Advance:

1. On the Expected Expenses screen of a Travel Request, navigate to the **Request Details** drop-down menu and select "**Add Cash Advance"** under Linked Add-ons.



NOTE: A user will not see this option if approval and additional setup noted above have not occurred.

2. Enter the "**Cash Advance Amount"** and reason for advance. Select **"Save"**. This will add the cash amount to the request.



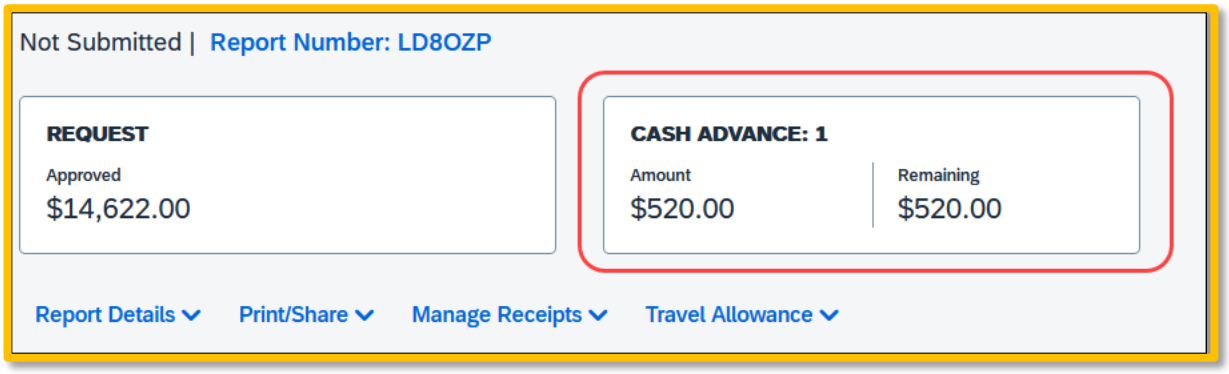
3. Complete and **Submit Request** as normal.

Expensing a Cash Advance

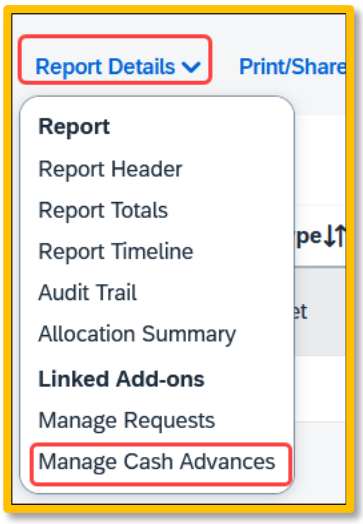
If you had a cash advance issued, you will need to expense the cash advance with your expense report for the associated trip the advance was used for.

To Expense a Cash Advance (Fully utilized):

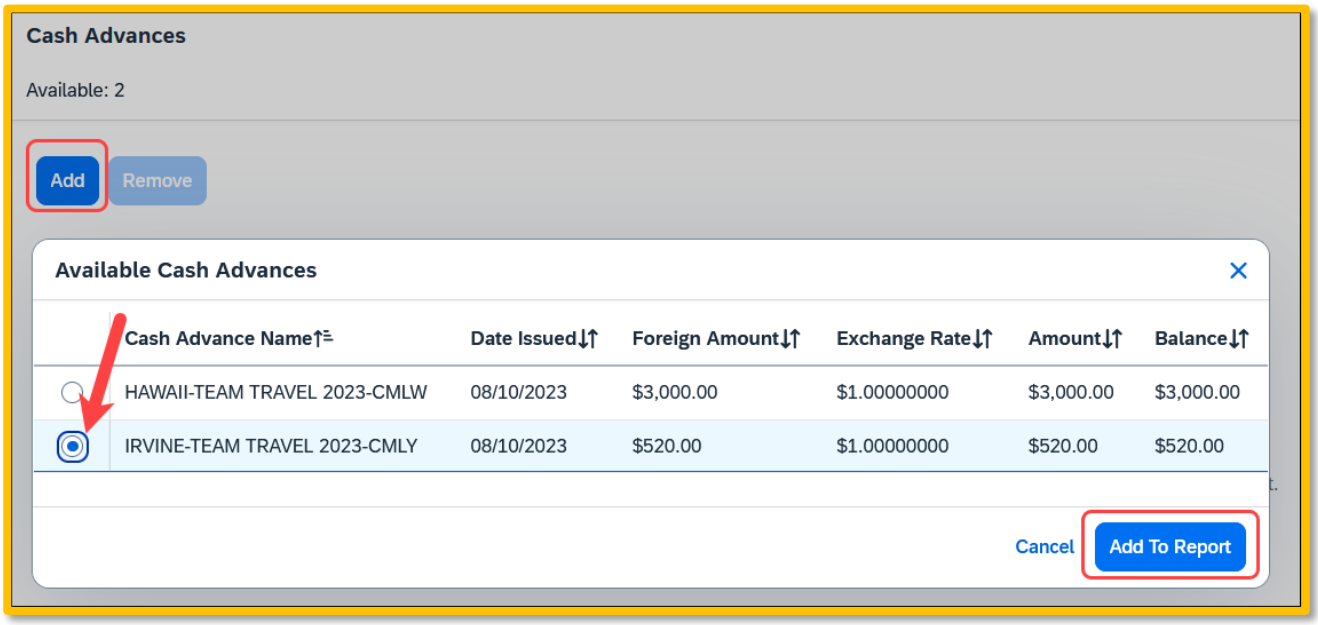
At the top of the report, you will see the outstanding advance. This should be the amount you received for the cash advance. If the Cash Advance box is not displayed, you can add the advance.



1. From within the Expense Report, select "**Report Details".** Select **"Manage Cash Advances".**



2. Select "**Add"**. Click the radio button next to the correct advance, and then click **"Add To Report."**

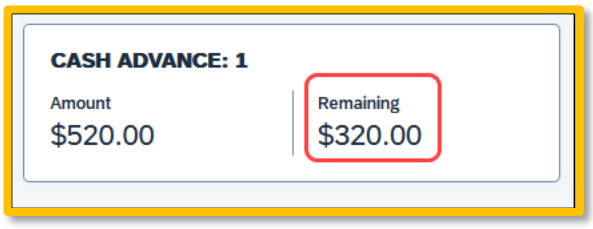


3. Continue to enter your expenses as normal. When you enter an out-of-pocket expense, the outstanding cash advance balance will reduce.

    - When you enter an out-of-pocket expense, the outstanding cash advance balance will reduce.
    - If the Outstanding Advance balance is zero, then the cash advance has been fully utilized.
    - If you have additional out of pocket expenses, you will receive the balance you paid out of pocket minus the cash advance amount.

To Expense a Cash Advance (Excess Funds to be returned to the University):

If there are funds not fully utilized from the advance after accounting for all expenses, you will see the amount remaining at the top of the screen. The remaining amount must be paid back to the University and the returned amount must be accounted for within the expense report.



1. *All excess funds must be returned to the University before you can submit your report:*

    a. Email One-Stop Travel Services at travel@calstatela.edu to coordinate a time and date to deposit the amount in person.

    b. Once deposited, you will receive a receipt from One-Stop Travel Services for the return of the cash advance.

2. In Concur, enter an expense line for the funds returned as "**Cash Advance Return."** Attach the receipt you received from paying back the advance. This will clear the remaining balance to $0.00. You will now be able to submit the expense report.

