International Travel

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International Travel Overview

- **Travel Request**: Formerly known as a Request for Authorization to Travel is required to obtain preapproval of your travel prior to making any travel reservations and submitting an Expense Report.

- The Travel Request must be submitted at least 45 days prior to international travel and approved prior to booking travel reservations and completing an Expense Report. For time sensitive travel, please consult with your department and Risk prior to submitting your request.

- A completed FTIP form (Request for Foreign Travel Insurance Program) needs to be attached to the Travel Request prior to submission. If High Hazard, please also attach Request to Travel Approval to High Risk Country form.

- Approved Travel Requests will automatically close 60 days after the Travel Request **Travel End Date**.
Creating a New Travel Request

To Create a New Travel Request from the Concur Homepage, you have two options:

• On the Quick Task Bar, under **New > Start a Request**

  **OR**

• On the menu, click **Requests > New Request**
Creating a New Travel Request

Travel Request consists of the following Tabs:

- Request Header
- Segments (Airfare, Car Rental, Hotel, Rail)
- Expenses
- Approval Flow
- Audit Trail
<table>
<thead>
<tr>
<th>Required Fields</th>
<th>Appropriate Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request/Trip Name</td>
<td>Enter Trip Name such as Conference/Workshop name (Trip Identifier)</td>
</tr>
<tr>
<td>Trip Type</td>
<td>International</td>
</tr>
<tr>
<td>Travel Start and End Date</td>
<td>Start and End Date of your Travel (including any personal days of travel)</td>
</tr>
<tr>
<td>Traveler Type</td>
<td>Staff or Faculty</td>
</tr>
<tr>
<td>Trip Purpose</td>
<td>Choose a travel purpose description from the drop-down list</td>
</tr>
<tr>
<td>If Faculty, is class covered?</td>
<td>Yes, No, NA? (Do you have a plan/substitute for your classes while you are away?)</td>
</tr>
<tr>
<td>Personal Dates of Travel</td>
<td>Enter Personal Dates of Travel. If none, enter NA</td>
</tr>
<tr>
<td>Destination City/State &amp; Final Destination Country</td>
<td>Enter Destination City and State &amp; Final Destination Country. Final Destination Country should populate based on the Destination City/State</td>
</tr>
<tr>
<td>Are you traveling to a banned State?</td>
<td>No</td>
</tr>
<tr>
<td>Chartfield Information</td>
<td>Default chartfield will populate with NG001 fund, but can be changed. Add class code 11444 for international travel.</td>
</tr>
</tbody>
</table>
Attaching FTIP (Request for Foreign Travel Insurance Program)

• You will need to attach a completed FTIP form available on Risk Management’s website at www.erm.sfsu.edu or [here](#).

• Complete the FTIP form online and save to your computer. Please make sure the form is filled out with all the correct information and that the information matches your Travel Request.

• Then upload the completed form to your Travel Request after you fill out the Request Header and Save. To attach, click on Attachments > Attach Documents.

• Any questions on the FTIP form, please contact Risk Management, ADM 260 at (415) 338-2565.
You will need to attach a completed Request for Travel Approval to High-Risk Country form available on Risk Management’s website at www.erm.sfsu.edu or here if you are travelling to a destination that is deemed High Hazard/Risk.

Complete the form online and save to your computer. Please make sure the form is filled out with all the correct information.

Then upload the completed form (along with the FTIP) to your Travel Request after you fill out the Request Header and Save. To attach, click on Attachments > Attach Documents.

Any questions related to this form, please contact Risk Management, ADM 260 at (415) 338-2565.
• **Step 1**: Complete **Travel Request Header**.
• **Step 2**: Click **Save**.
• **Step 3**: Add completed FTIP form (and High Hazard form if applicable) to the **Attachments** Box
• **Step 4**: Once Header is complete, click on **Segments** Tab.

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All boxes with red bars are required fields.

Attach FTIP form (and High Hazard form if applicable). Attachments box will appear after you save the header.

Use Class Code 11444 for International Travel.
requesting a travel advance

- You can request a Travel Advance on the Request Header. However, you must contact AP Travel Desk for setup first.
- Once your account is setup, you will see the **Cash Advance** option below the chartfield information.
- **Travel Advance** eligible for international and group travel only.

If you do not see this option, that means your account is not setup yet.
Please fill out estimates for the **Segments** (regardless of how you are booking) if applicable to your travel:

- Airfare
- Car Rental
- Hotel
- Rail
The dates will populate and move over from the **Request Header**. Fill in all applicable fields (**Amount** is required), click **Save**.
• After you save each segment, you have the option to **Allocate**, **Delete** or **Modify** the segment. Or, you can wait until all your estimated expenses are entered and allocate at the end.
The dates will populate and move over from the Request Header. Fill in all applicable fields (Amount is required), click Save.
• Fill in all applicable fields (Amount and Maximum Nightly Rate is required), and click Save.

• Enter Maximum Nightly Rate that you estimate your hotel expense. The system will not know at this point your max per diem allowed for that destination. Please refer to the maximum reimbursement amounts by destination at https://aoprals.state.gov/web20/per_diem.asp before booking your travel to ensure you don't exceed the hotel per diem rates (includes all taxes/hotel fees).
• The dates will populate and move over from the Request Header. Fill in all applicable fields (Amount is required), click Save.
You can provide estimates for the following additional Expense Types:

- You should provide estimates for all expenses related to your travel regardless of how it is to be paid.
- Airfare, Hotel, Car, and Rail should be added/modified under the Segments Tab.
- Not all Expense Types are available in the request module. In this case, you can enter an estimated amount under Other Expense and then claim the actual expenses on your Expense Report to have the requested amount closer to the actual expenses.
- After clicking on the Expense Type and entering the required and optional information if needed, you can then Allocate (if needed) and Save.
- Do not use Expense Types: Incidents and Meals – Domestic, for International Travel.
By Selecting **Meals & Incidentals – International, Alaska & Hawaii** – it will automatically calculate the max per diem for the destination country multiplied by the # of travel days. To see the per diem amount, click on the Meals & Incidentals Expense and then **Save**. To lessen this estimated amount, you can click back into the expense and enter the amount you wish to subtract by entering it as a **Reduction Amount**. Otherwise, leave that amount $0.
• Add your additional expenses (estimates) to your request if university/grant funds will be used regardless of how they will be paid. Once each expense is saved, it will appear on the left hand side.

• If you need to add any additional attachments or still need to add the FTIP or High Hazard form, click on Attachments > Attach Documents.

• Must Attach Request for Foreign Travel Insurance Coverage form (FTIP) and High Hazard form (if applicable) to your Travel Request for International Travel.

• Please Note: Attached documents will not carry over to your Expense Report. You will need to attach them again to the Expense Report if needed.
After you save each segment/expense, you have the option to allocate, delete or modify.

- **Allocate**: You can allocate a valid chartfield for a particular expense if necessary. If you will be using the same chartfield from your Request Header, then no further action is needed.
  - You have the option to allocate by **Percentage** or **Amount**.
- **Delete**: If you want to delete the segment/expense all together.
- **Modify**: If you need to make changes to any part of the expense.
After you have completed the Request Header, Segments and Expenses, you can submit your request by clicking Submit Request.

- You can also click on Print/Email and a PDF version of the Travel Request will pop up and you can make your selection. It is best to do this after the Travel Request is fully approved.

- If you wish to delete your entire request, you can do so by clicking Delete Request. You will not be able to delete a request once the request is submitted. However, you can Recall the Request after submission if it has yet to be fully approved, or Cancel the Request at any time.
Travel Request Approval Workflow

Concur Approval Workflows

Travel Request = In-State/Out-of-State

1. Travel Request Submitted
2. "Reports To" Approver
3. Budget Approver
4. Travel Request Approved

Travel Request = International

1. Travel Request Submitted with Foreign Travel Insurance Form attached
2. "Report to" Approver
3. Budget Approver
4. Exception Approver (Provost)
5. Travel Request Approved

Expense Report = In-State/Out-of-State/International

1. Expense Report Submitted
2. "Report to" Approver
3. Budget Approver
4. AP Travel Processor
5. Expense Report Approved
6. CRS
Travel Request Approved

• Once your travel request has been approved:
  • You will receive an email notification from Concur stating your Request has changed status to: Approved.
  • You can book your travel via Concur (using the Trip Search or Travel tab) or outside of Concur.
  • You can no longer make updates. However, you can add additional attachments at anytime. In order to make changes, you must copy the approved request, make your changes, add the attachments again, and then submit for approval. Please make sure to cancel and close the original request.
The **Audit Trail Tab** will show a record of all actions and descriptions within the approval workflow conducted by the traveler, delegate, or approver for that particular Travel Request.

- The Audit Trail will show the user who completed the action.
- Anytime the Travel gets modified, approved, sent back, a comment added, chartfield edited, will be recorded.
- Anyone who can access the Travel Request will be able to access and view the Audit Trail.
Need More Information?

- For more in depth information regarding Concur Travel & Expense, please check out the Concur Handbook and other related documentation at: https://fiscaff.sfsu.edu/content/sf-state-travel-center
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Administration & Finance

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