Creating a Sponsored Guest Expense Report
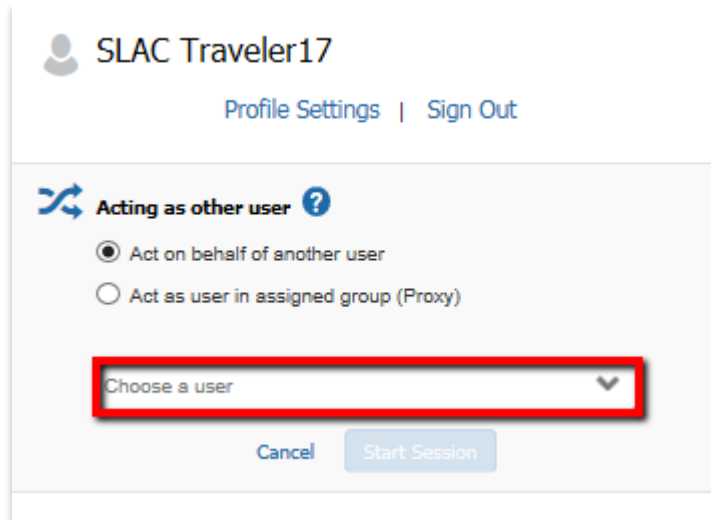
Note: Either the Admin or the Sponsored Guest can create an expense report for a Sponsored Guest.
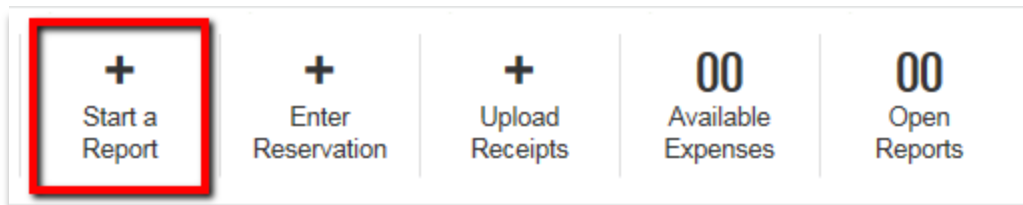
Note: If you are a Sponsored Guest creating your own expense report, proceed to step #2.
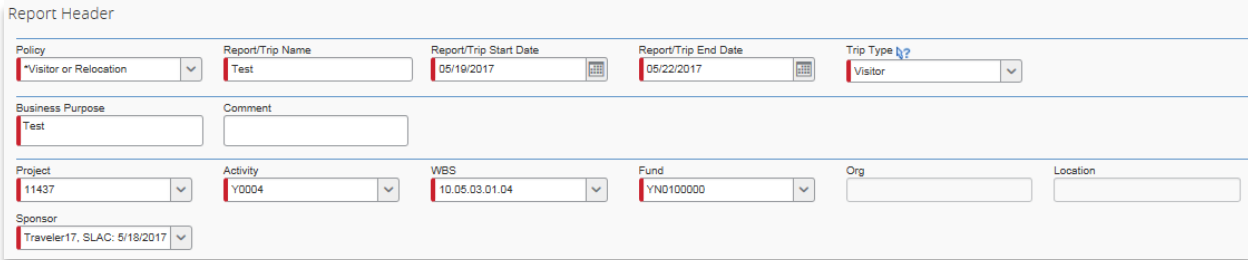
1. If an Admin is creating the expense report for the Sponsored Guest, go to *Profile* and under *Acting as other user*, **select** the Sponsored Guest from the dropdown and **click** *Start Session*. This will allow you to create and submit the expense report under the Sponsored Guest's name.

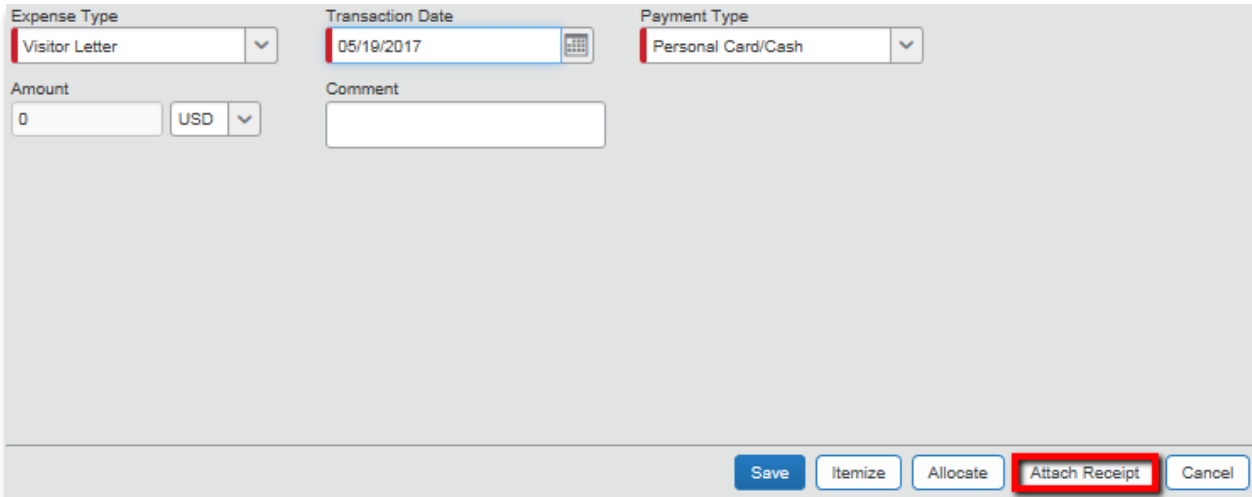2. To create an expense report, **click** *Start a Report* on the Concur Home page.

3. **Fill out** all required fields under the *Report Header*.

    a. Be sure that *Visitor or Relocation* is selected for *Policy* and either *Visitor or Relocation* is selected for *Trip Type*.

    b. If you are a Sponsored Guest filling out the expense report and don't know your Project Number, contact your sponsor (admin contact) to get the number.

    c. Be sure to **select** the correct sponsor under the *Sponsor* dropdown.

4. Filling out the Sponsored Guest expense report is similar to filling out a regular expense report. If you need help with the process, check out the *Creating an Expense Report* Quick Guide.

5. There are a few different expense types specific to Sponsored Guests. We will go over each of them here:

    a. **Visitor Letter.** All Sponsored Guests must have a visitor letter in order to visit SLAC. Attach a copy of the letter by **clicking** *Attach Receipt* and uploading the file. For *Transaction Date*, **enter** the day you arrive at SLAC, and for *Payment Type* and *Amount* keep it as defaulted.
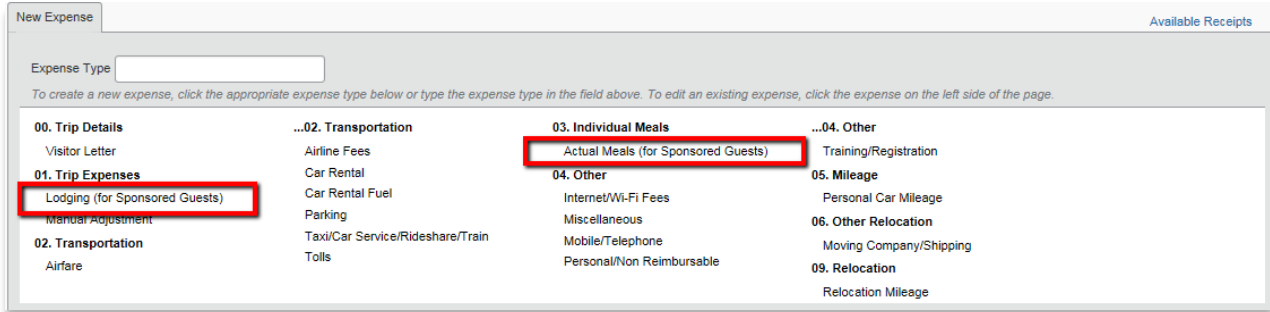
b. Be sure to use the expenses *Lodging (for Sponsored Guests)* and *Actual Meals (for Sponsored Guests)*. The submitted lodging receipt must be itemized, but the expense in concur may does not.

c. For Actual Meals, be sure to enter the total meal expense for your trip, not each day. If including receipts only claim the amounts found on the receipts, not the per diem rates. Any reports claiming per diem while including meal receipts will be rejected.

Note: The *Moving Company/Shipping* and *Relocation Mileage* expense types are only for relocating SLAC employees.

6. Once the expense report is filled out, you can submit it by **clicking** *Submit Report*. If an Admin completed the expense report for their Sponsored Guest, they will see a *Notify Employee* button instead, which will push the report over to the Guest to review and submit.