

Creating a Sponsored Guest Expense Report

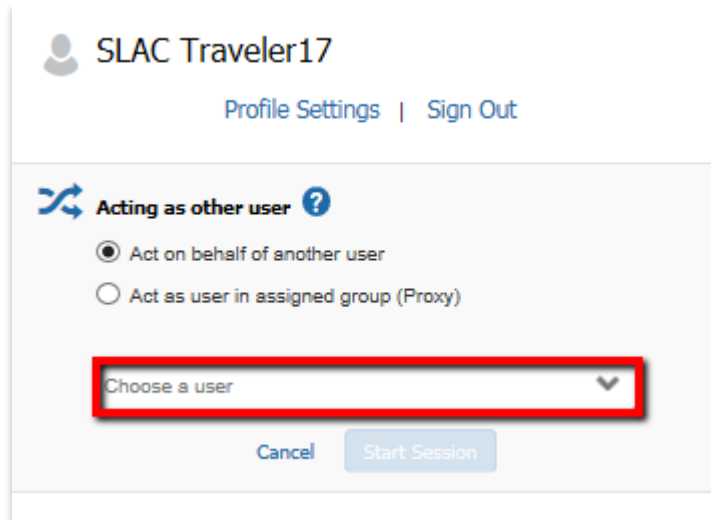


Note: Either the Admin or the Sponsored Guest can create an expense report for a Sponsored Guest.

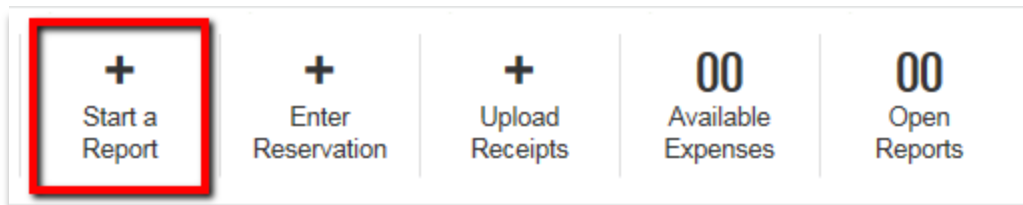


Note: If you are a Sponsored Guest creating your own expense report, proceed to step #2.

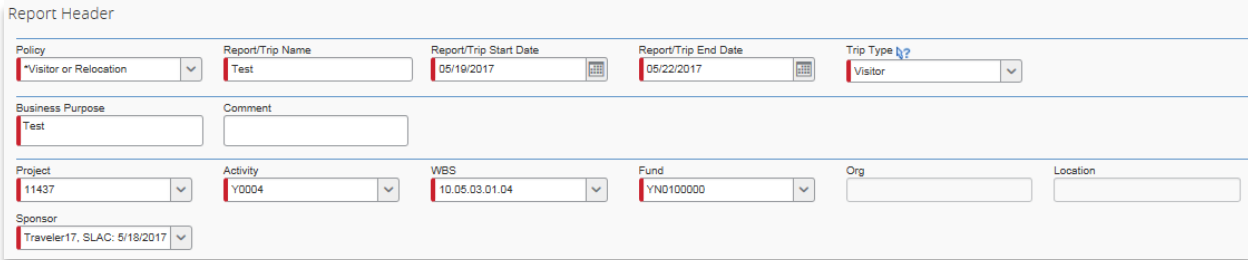
1. If an Admin is creating the expense report for the Sponsored Guest, go to *Profile* and under *Acting as other user*, **select** the Sponsored Guest from the dropdown and **click** *Start Session*. This will allow you to create and submit the expense report under the Sponsored Guest's name.



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



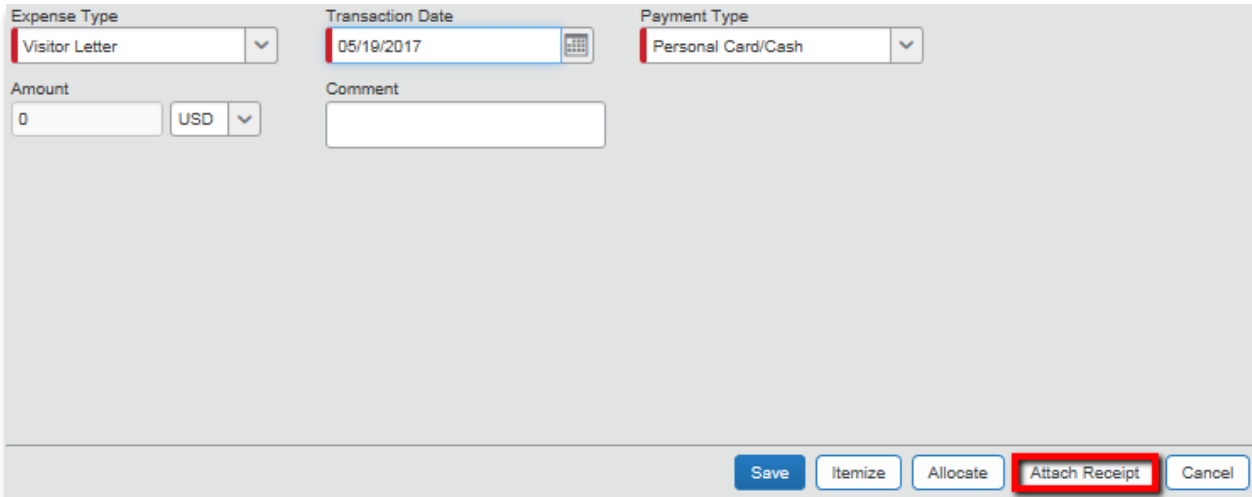
3. **Fill out** all required fields under the *Report Header*.
 - a. Be sure that *Visitor or Relocation* is selected for *Policy* and either *Visitor or Relocation* is selected for *Trip Type*.
 - b. If you are a Sponsored Guest filling out the expense report and don't know your Project Number, contact your sponsor (admin contact) to get the number.
 - c. Be sure to **select** the correct sponsor under the *Sponsor* dropdown.



The screenshot shows the 'Report Header' form with the following fields and values:

Policy	Report/Trip Name	Report/Trip Start Date	Report/Trip End Date	Trip Type	
Visitor or Relocation	Test	05/19/2017	05/22/2017	Visitor	
Business Purpose	Comment				
Test					
Project	Activity	WBS	Fund	Org	Location
11437	Y0004	10.05.03.01.04	YND100000		
Sponsor					
Traveler17, SLAC: 5/18/2017					

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.

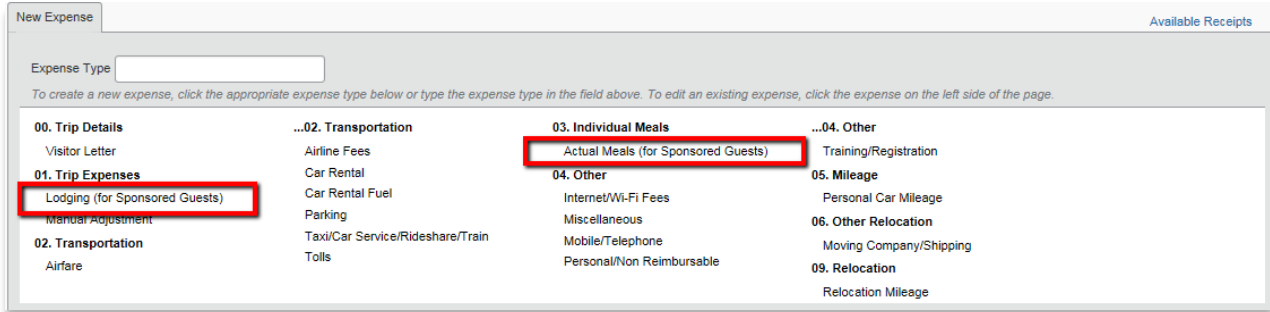


The screenshot shows the 'Expense Type' form with the following fields and values:

Expense Type	Transaction Date	Payment Type
Visitor Letter	05/19/2017	Personal Card/Cash
Amount	Comment	
0 USD		

Buttons at the bottom: Save, Itemize, Allocate, **Attach Receipt**, Cancel

- 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.



New Expense Available Receipts

Expense Type

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

00. Trip Details Visitor Letter	...02. Transportation Airline Fees Car Rental Car Rental Fuel Parking Taxi/Car Service/Rideshare/Train Tolls	03. Individual Meals Actual Meals (for Sponsored Guests)	...04. Other Training/Registration
01. Trip Expenses Lodging (for Sponsored Guests) Meal Adjustment		04. Other Internet/Wi-Fi Fees Miscellaneous Mobile/Telephone Personal/Non Reimbursable	05. Mileage Personal Car Mileage
02. Transportation Airfare			06. Other Relocation Moving Company/Shipping 09. Relocation Relocation Mileage

- 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.

