



NON-EMPLOYEE SETUP AND BOOKING PROCESS IN CONCUR

NOTE: Personal information from non-employees must be gathered securely, either via phone or via secure Outlook email. To request sensitive information and ensure that it remains encrypted when the non-employee responds you should include [secure] in the subject line of the email. The non-employee will receive an email that will require a one-time password to unencrypt the original request. Any replies including the sensitive data will be encrypted back to the UMB employee.

In email to the non-employee, ask for the following information:

- Name as appears on Driver's License
- Email address
- Home address
- Phone (mobile phone)
- Emergency Contact – name, relationship, and contact's phone and address
- Date of Birth and Gender (only male or female in Concur)
- Visa/Passport if International travel is expected (optional)
- TSA Pre-check number if booking (optional)

Complete User Authorization Form

- Complete name of non-employee as appears on driver's license and email address
- Identify travel admin and the traveler delegate (cannot be the same person)
- Travel Assistant- **Enter this in the Comments** only if it's different than the travel delegate. (By default it will be the travel delegate.)
- Identify the default SOAPF for the travel costs

**Wait for the departmental approval of the form and the non-employee set up in Concur.

Switch to Act On Behalf Of...and Complete the Profile Setup for the Non-Employee

- Verify Name (edit if needed, or notify Concur Security if a suffix, such as Jr., needs editing)
- Enter Home address
- Enter mobile phone as both home phone and mobile phone
- Verification of Email address is not required
- Emergency Contact information
- Enter Birthdate, Gender
- TSA Precheck or Known Traveler Number (Optional)
- Visa or Passport (if international trip is expected)

- Turn off (uncheck the option for) email options in Request Preferences section, as shown:

- Turn off (uncheck the option for) these email settings in **Other Settings > System Settings**:

Other Considerations

Any affiliate who needs to be a delegate or Travel Assistant needs a Concur User Authorization form.

Create the Travel Request and Submit (Non-ee has no access to Concur)

Department decides if the traveler’s travel assistant will book for the non-employee or if non-employee will use the travel agency, but booking type on the request must match the decision: either Book in Concur or Agent Assist as the Booking Type. Caution: if it doesn’t match, TLC cannot assist the non-employee.

- If the department requires the non-employee to use their own credit card, the Booking Type must be Agent Assist.

Complete the Non-employee Travel Request and Print it to pdf when it’s approved.

- Forward the Request ID to the non-employee along with the Travel Leaders Corporation phone number to book, between the hours of 8 am -6 pm EST only. (After hours booking incurs a fee.)

After Travel is Complete

Search suppliers in Quantum Financials for the non-employee traveler. If not found, create a Supplier Registration Request. Once approved, create a NONPO Invoice in Quantum Financials. Refer to the [Business Travel Non-employee Procedure](#). Also refer to the Quantum Financials tutorial, Creating a NONPO Invoice for a State Payment for the steps to complete in Quantum Financials.