

Travel FAQs

Booking Travel with Travel Leaders & Concur

Why does State Fund use Travel Leaders?

We selected Travel Leaders to manage business travel for State Fund due to their adherence to California's higher security, data, and privacy standards. Additionally, the partnership will result in a significant cost savings to State Fund. Travel Leaders is on the Concur platform and continues to offer convenient booking and a high level of customer service.

What is the difference between Travel Leaders and Concur?

Travel Leaders is the travel agency and Concur is the online platform provided to the business traveler to book flight, auto and hotel accommodations.

How do I set up a Concur profile with State Fund?

You must submit an [AskAdmin – Travel Request Ticket](#). The purpose of this request is [Concur Profile Set Up \(Option 1\)](#). Enter the required employee information for yourself or your employee(s). Once the Concur profile is set up, the login information with Concur 2 Factor Authentication (2FA) instructions will be sent to you. The Concur platform requires 2FA before logging into Concur. If you want to use Concur on the State Fund computer and skip Concur 2FA, you must have Concur Simplified Sign-On access.

How can I obtain Concur Simplified Sign-On access?

If you are a Concur new user, your information will be logged on the Concur New user list and sent to IT to grant you Concur SSO (Simplified Sign-On) access once a month.

If you are a current Concur user, but have lost the Concur SSO access, you must submit an [AskAdmin – Travel Request](#). The purpose of the request is Other Travel Inquiries (Option 2). In the details section request Concur SSO has been lost. Your information will be added to the Concur New user list and your Concur SSO access should be accessible in one month. During the waiting period, you will use Concur 2FA with username and password to login your Concur account.

If I have difficulty booking travel via Concur, may I call Travel Leaders for assistance?

Yes, Travel Leaders is available to assist. A full-service fee of \$30 will be applied, and a reduced fee of up to \$20 will be applied in the event there is a Concur outage.

Submit an [AskAdmin – Travel Request](#) before contacting Travel Leaders as Business Services may be able to assist you without incurring additional fees.

The dedicated phone line for booking directly with Travel Leaders is (763) 231-8891 accessible Monday – Friday 6:00 a.m. to 5:00 p.m. and Emergency Support is available 24 hours a day 7 days a week by calling (877) 257-5122.

Is booking travel with Travel Leaders/Concur designated for State Fund employees only?

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Yes, although a few consultants in operational or administrative roles are approved to book through Travel Leaders/Concur.

How do I use my unused Southwest Credit on Concur?

Effective August 1, 2024, all unused Southwest flight credits will have 90 days from the cancellation date to be used. Should you intend to travel within 90 days of a cancelled flight, please contact Travel Leaders to apply your credit to a new ticket. Once the 90-day period has elapsed, the credits will be transferred to a Universal Air Travel Plan (UATP) card. The UATP funds will be allocated for other State Fund employee air travel. If you still have any other questions, please feel free to reach out to [AskAdmin – Travel Request](#) Ticket.

Can I book my travel outside of Concur to save money on booking fees or to get a better rate by booking directly with hotels offering special rates?

No, all business travel must be booked through Travel Leaders/Concur. Advantages

of using Concur to manage business travel are as follows:

- ✓ Ensures the safety and well-being of State Fund travelers by providing the means to locate travelers in the event of emergencies.
- ✓ Increases efficiency and helps maintain control over employee spend by providing total visibility into travel spend data.
- ✓ Travel spend data can be used to leverage and negotiate competitive rates.
- ✓ Ensures traveler compliance to travel policy by providing oversight tools such as booking out of state travel or lodging in excess of State rates.
- ✓ Serves as a resource to manage and apply unused Southwest airline ticket credits prior to expiration.

What can I do to help minimize booking fees?

Use Concur to book all the travel segments online in **one transaction**. You will be charged the lowest rates possible based on your travel needs.

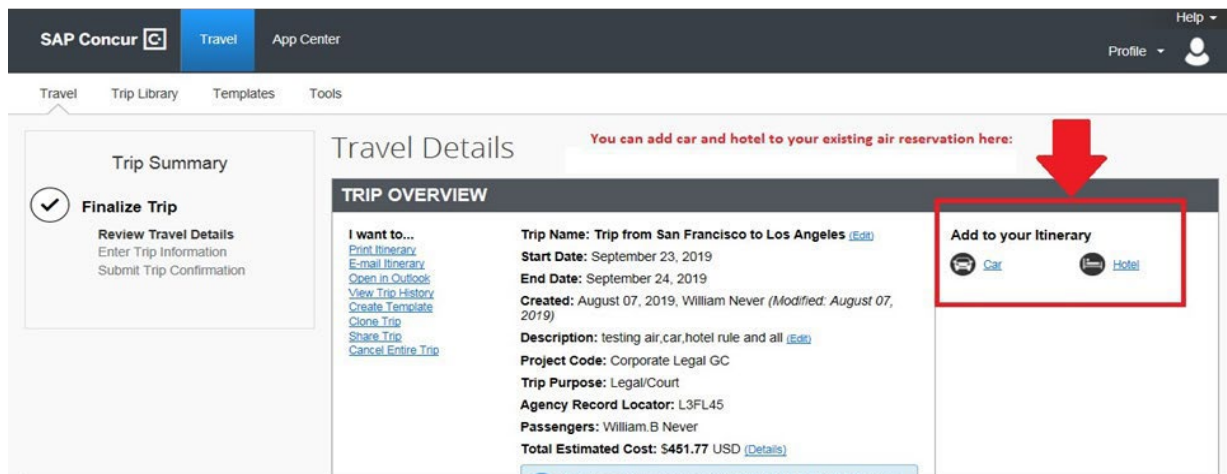
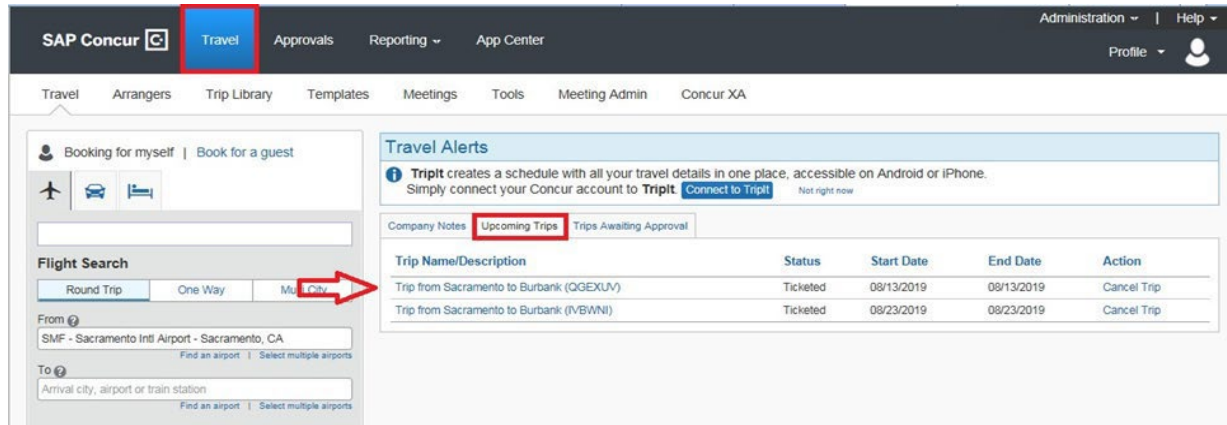
Tips to keep travel fees lower:

- Book online using Concur. The booking fees will be lower than if you book with a live agent.
- Book airfare, hotel and car rental in one reservation to save the booking fee for State Fund. The booking fee for this one transaction is \$10.00.
- If you only booked airfare and later need to add a hotel or car rental, you can go back into the same airfare reservation and add hotel or car rental. There will be no additional booking fees.

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- Book hotel only or car rental only, you will NOT be able to add airfare to that reservation. You will need to add a new reservation for airfare. The booking fee for two transactions will be a total of \$20.00.
- Ensure that your PCard is activated and updated in your Concur profile before booking a reservation. This will prevent any additional charges from Travel Leaders.



For questions please submit an [AskAdmin – Travel Request Ticket](#).

How can I help State Fund save on travel expenses?

Booking airfare 14 days or more in advance can save on average 20% of the cost of air travel. Additionally, avoiding last minute hotel bookings can also yield significant savings.

Can I use the SAP Concur mobile app for booking travel?

Yes, you can download the app from the Comp Portal on your State Phone or the App Store on personal cell. The app requires existing Concur login information. If you already have the SAP Concur app you do not need to reinstall to access bookings with our travel vendor.

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What if I need to change or cancel my travel arrangements?

You can make changes to your reservation in Concur by logging in to the reservation and using the "Change" option. Keep in mind flights generally need to be cancelled 2 hours in advance. Canceled flights will receive a credit tied to the ticket number. Lodging needs to be cancelled based on the rules of your hotel reservation. If lodging is not cancelled within the cancellation period, your P-card will be charged a "no-show" fee and you will need to expense the charge in Oracle.

Will Travel Leader charge me the service fee if I contact them to cancel my reservations on Concur?

Travel Leaders do not charge to cancel if done during business hours (Monday – Friday 6:00 a.m. to 5:00 p.m.). If a cancellation is made with their afterhours department, the service fee will be charged. If you cannot cancel your trips on Concur due to technical issues, contact Travel Leaders to cancel the trip.

How do I receive the refund if I cancel a refundable ticket on Concur?

Cancelling the flight in Concur does not refund the ticket. When a traveler has a **refundable** ticket, contact Travel Leaders and state, "This was a refundable ticket, can you make sure the refund is completed?" (This situation is for when the flight has not occurred).

What do I do if the flight is cancelled by the airline due to major changes, airport switches, added stops, or downgrades?

Starting October 28, 2024, new U.S Department of Transportation (DOT) regulations require airlines to automatically issue cash refunds for cancellations or major changes (3+ hour delays for domestic flights, 6+ hours for international flights) or major schedule changes such as airport switches, added stops, or downgrades. CONTACT TRAVEL LEADERS FOR ASSISTANCE. (This situation may happen before the flight date or at the airport.)

Can personal Travel be booked thru Travel Leaders/Concur?

No. Travel Leaders/Concur is for business travel only. We incur fees associated with booking travel and have budgeted travel based on business travel needs. Travel Leaders is a State Fund travel agency and provides services only to State Fund business travelers. Personal travel templates are not allowed for use by State Fund business travelers on Concur.

Can I use my Concur account for another user?

You can book travel for another user if you are designated as a Travel Arranger in Concur. Travel Arrangers may book travel using the profile of another user. If you would like to add a Travel

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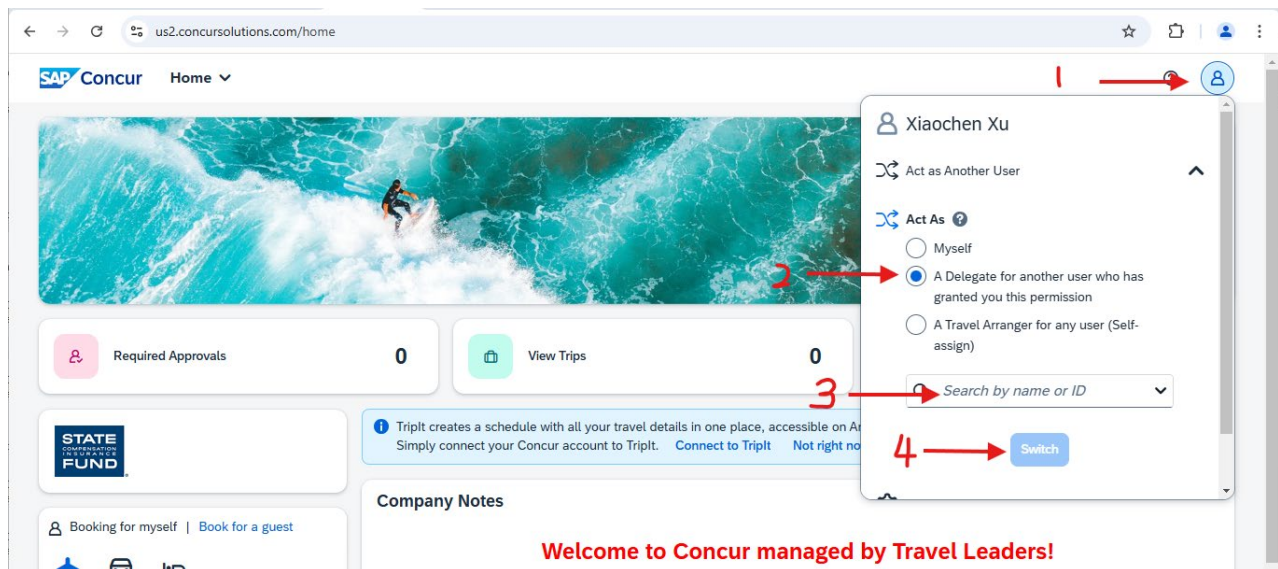
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Arranger, update your profile or you may submit an [AskAdmin – Travel Request Ticket](#) if you are experiencing difficulties.

How could I book travel for another user as a Travel Arranger in Concur?

You must submit an [AskAdmin – Travel Request Ticket](#) to request Travel Arranger access for another traveler. Once you have the access, you login to your Concur profile to follow the instructions below to switch to another traveler's profile to book travel.

Click profile icon- select "A Delegate for another user who has granted you this permission"- search the traveler's name- click "Switch".



How do I add/delete/edit business travelers to/from Travel Leaders/Concur?

Managers and Supervisors can authorize or revoke access to Concur for business travelers by submitting an [AskAdmin – Travel Request Ticket](#). Business Services staff will update the business traveler's profile in Concur.

How do I add or update my PCard information in my Concur profile?

To add or update your PCard information in Concur, refer to [How to Add/Change a PCard on Concur – Job Aid](#). The billing address for your PCard can be found in the confirmation email sent by PCard Help team.

For reference, the billing address is: **5880 Owens Drive, Pleasanton, CA 94588-3900.**

Could I use my manager's PCard to book my business travel on Concur?

You may use your manager's PCard to book your flight if the manager approves it. However, you cannot use the manager's PCard to book a hotel or auto rental. The car/hotel can be reserved

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with any card, but the traveler has to present a card at pickup or check-in, which belongs to them. If you need business travel more than 2 times in one year, you can ask your manager to contact Financial Operations (PCardHelp@scif.com) to assign you a Travel PCard.

Can I use my personal credit card to book business travel in Concur if I don't have a PCard?

If you do not have a PCard and need to book urgent or one-time business travel, you may use your personal credit card in Concur with prior approval from your manager.

Is Enterprise State Fund's preferred car rental agency?

Yes. Enterprise and National are State Fund's Most Preferred auto rental agencies. There are benefits to booking with Enterprise such as declining additional vehicle insurance and refueling the vehicle before the return. In emergency situations and with prior approval from Business Services, business travelers may be allowed to use a different auto rental agency.

What size rental cars vehicles are authorized for business travel employees authorized to rent?

Employees should book a compact or intermediate car. A larger vehicle can be rented if there is a business need and requires approval from Business Services.

Can you have family members in a State Fund rented vehicle?

Yes, but only the State Fund employee can operate the State Fund rented vehicle. The family member can only ride as a passenger.

Do I need to refuel a vehicle prior to returning it to the rental car agency?

If you use Enterprise or National, it is not necessary to refuel prior to returning the rental car. Our contract with Enterprise/National includes gas refills at the market per gallon rate.

If I book a car through Enterprise directly, is it still considered a State reservation if I go to the ticket counter or kiosk?

Yes, while you are able to book directly with Enterprise, we encourage using Concur when possible. If you experience any issues receiving the State rate at the Enterprise ticket counter or kiosk, please contact us immediately so we can help resolve the issue before the booking is complete.

Can I select the airline of my choice or am I required to use Southwest Airlines?

Southwest is State Fund's preferred carrier, as most of our flights are intrastate. Other airlines may be used based on business need and flight availability.

Do I print my boarding passes the same as before....24 hours before the flight?

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Yes, the check-in policy will remain the same. Additionally, you may use the Southwest app which offers online check-in and a digital boarding pass. The Southwest app can be downloaded from the Comp Portal on a State issued iPhone. Use the App Store if using a personal device.

Can I book airfare from one airport and return from another airport as one transaction? i.e. Travelling from OC to SMF and returning from OAK to OC?

Yes. There is a Multi City option in Concur that allows you to fly to and from different airports.

If I am booking a hotel only, with no flight or rental car, am still I required to use Concur?

Yes, you are required to use Concur for all business travel. Please see [Advantages of Using Concur](#) above for additional information.

Can I reserve a hotel on Concur that includes Govt. /Military, Federal Government Federal ID required?

No, you should only book hotel rooms that offer State rates. Look for “*Most Preferred Hotel for State Compensation Insurance Fund*” or “*Preferred Hotel for State Compensation Insurance Fund*” when searching for hotels in Concur.

How Can I find State Fund Lodging rates?

State Fund lodging rates are in Worksite. Please reference [Employee Business Expenses - Lodging Rates](#) State Fund lodging rates are based on counties instead of cities. Please identify the city and county of the hotel, before you book the hotel on Concur.

How to locate exact hotel rate in Concur?

When you get to the review page and prior to clicking accept, please review price summary to make sure the rate you choose is under State Fund lodging rate. If it states “RATE CHANGES OVER DURATION OF STAY” please look for a different hotel in the area with an approved rate for all nights.

REVIEW PRICE SUMMARY

Description	Average Nightly Rate	Dates	Total
Kimpton Sir Francis Drake Hotel	~\$364.00	Apr 26 - Apr 29	\$1,092.00
Total Estimated Cost: \$1,092.00*			
Total Due Now: \$0.00**			

~ Rate changes over duration of stay. Amount shown is the average nightly rate.
 * May not include taxes or additional fees.
 ** Remaining amount due at hotel location.

SELECT A METHOD OF PAYMENT

The credit card you select will be held to confirm your reservation. You will not be charged in full until your hotel stay.

Fake Card (...1111) Edit Add credit card

* Indicates credit card is a company card

ACCEPT RATE DETAILS AND CANCELLATION POLICY

Please review the rate details and cancellation policy provided by the hotel.

Kimpton Sir Francis Drake Hotel KIMPTON

Please review the rate rules and restrictions before continuing.

The hotel provided the following information:

RATE CHANGES OVER DURATION OF STAY

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ACCEPT RATE DETAILS AND CANCELLATION POLICY

Please review the rate details and cancellation policy provided by the hotel.

Hotel Rates

222.00 USD PER NIGHT STARTING 26APR FOR 1 NIGHT
 413.00 USD PER NIGHT STARTING 27APR FOR 1 NIGHT
 457.00 USD PER NIGHT STARTING 28APR FOR 1 NIGHT
 1092.00 USD TOTAL RATE STARTING 26APR FOR 3 NIGHTS

ROOM RATE DETAIL:
 16.45 PERCENT SALES TAX PER NT
 33.77 USD SURCHARGE PER NT
 1372.94 USD TOTAL AMOUNT OF STAY

☐ I agree to the hotel's rate rules, restrictions, and cancellation policy.

Back
Reserve Hotel and Continue

Scroll to see the rates:

Please ensure the rate you choose is under State Fund lodging rate.

What if I cannot find lodging at the approved state rate?

If no other option is available, seek approval from your manager and submit an [AskAdmin – Travel Request Ticket](#).

In certain circumstances you may book the lodging. Business Services will be notified of bookings over \$301 and will contact you to offer additional lodging options if they are able to find a lower rate.

Can I book an Airbnb instead of a hotel?

Airbnb has not been officially approved for business lodging. Submit an [AskAdmin – Travel Request Ticket](#) for questions regarding Airbnb.

Please see [Advantages of Using Concur](#) for additional information.

Can I utilize my points/reward programs for travel?

Yes, you can add your rewards accounts to your profile in Concur for airfare, auto rental and hotels. Employees should use State Fund's **Most Preferred/Preferred** options available and must not book solely for the purpose of obtaining points. i.e. For Southwest airlines, employees should book the lowest fare possible "Wanna Get Away" fare.

How could I choose Rideshare (Uber for Business, etc.) or Rental Car in different scenarios?

Here are some travel scenarios and suggestions for your reference to select the most economical option.

Travel Scenario	Rideshare (Uber for Business, etc.)	Rental Car

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Short Trips: Your flight just landed at the airport, and you need to get to a meeting a few miles away. Attending a single meeting or client visit within the same city.		
Multiple Locations: You need to get to Los Angeles from Bakersfield for a four-day seminar and have meetings in multiple locations		
Economic Reasons: You fly to San Francisco and need to pay for parking fees at two offices you are visiting.		
Long Trips: You work in Sacramento and need to travel to a meeting in Fresno. Use a rental or personal car for travel over 300 miles round trip. Traveling to another city for a series of meetings or a conference over multiple days.		
Availability: You arrive at the car rental station to learn there are no more rentals available for the day.		

*Rideshare companies go through background checks, safety training, and apply rigorous vehicle safety requirements. Rideshare drivers also use GPS tracking.

Additional items to consider:

Ask a supervisor for approval for specific travel scenarios.

We recommend to not use the Reservation feature for the Uber for Business since this will increase the **total** trip cost as the Reservation fee can go up to 30% of the total trip costs. The Reservation feature can impact the Uber ride by any unexpected delay of flights triggering Uber reservation to be changed or cancelled.

We also recommend reducing Uber for Business ride costs by adhering to a 10% tip guideline. The total fare for Uber for Business is based on the combination of the fare, booking fee, reservation fee, insurance, and airport surcharges all inclusive. Note that 10% of the total fare could be high.

We recommend obtaining a test quotation of the ride and compare to the car rental on Concur, if the total ride costs combined is double or triple the rental car fee (often \$50 daily), the rental car is most economical.