

Blanket Travel Expense Report


These instructions will cover how to create and submit your monthly Blanket Travel Expense Report in Concur. A **Blanket Travel Expense Report** will be required if the traveler goes on a business trip in California, within a fiscal year (July 1st – June 30th).

Blanket Travel expenses will only apply to **Parking** and **Mileage**.

Click on any of the links below to skip ahead to that section.

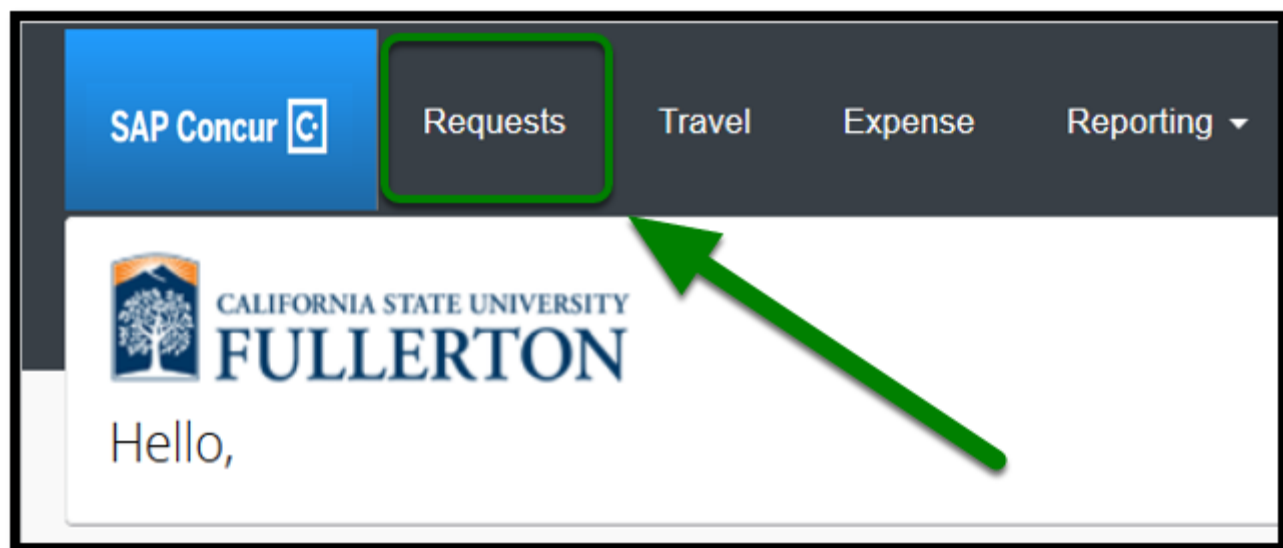
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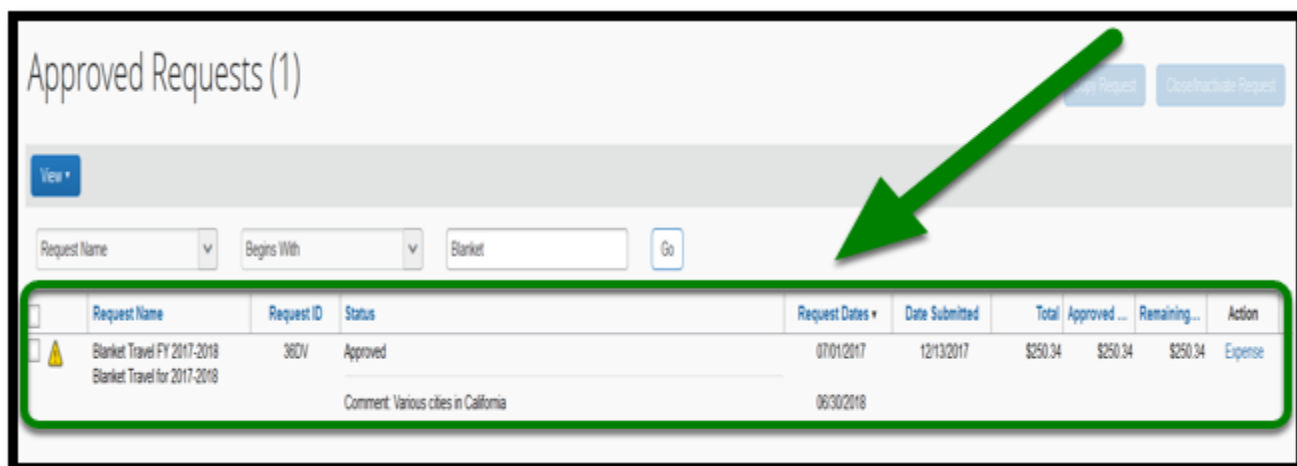
 If you need assistance with logging into Concur, please go to [Logging into Concur](#).

Creating Expense Report

Step 1: From the Concur Dashboard, click on the **Requests** tab.




Step 2: Go to your approved **Blanket Travel Request**.



💡 If you have an approved paper Blanket Travel Request, go to [Linking Paper Blanket Travel Request](#) for more instructions.

Step 3: On the right-hand side of the coordinating request, click on the **Expense** link.

| Approved ... | Remaining... | Action |
|--------------|--------------|---------|
| \$250.34 | \$250.34 | Expense |



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Report Header

Step 1: In the Report header, change the Policy to **State Blanket Travel Policy**.

Policy *

State Blanket Travel




Step 2: Under the **Blanket Travel Month / Year** field, change the naming convention to **Blanket Travel [Month][Year]**.

Ex: **Blanket Travel JUL 2019**

Blanket Travel Month/Year *

Blanket Travel JUL 2019



Step 3: Leave **Report Date** as the date that you are creating the report.

Report Date

08/01/2019



Step 4: For **Month Start Date**, change the date to the beginning of the month you are traveling.

Month Start Date *

07/01/2019



Step 5: For **Month End Date**, change the date to the end of the month you are traveling.

Month End Date *

07/31/2019




i You will submit one report for the entire month.

Step 6: For **Trip Type** dropdown, leave as In-State selection.

Trip Type *


In-State



Step 7: For **Were Registration Fees incurred or paid by the University?** dropdown, select the appropriate option.

Were Registration Fees incurred or paid by the University? * ?

No



i If yes for having a registration fee, a specific Travel Request and Expense Report must be submitted for all the travel expenses, i.e. registration fee, mileage, parking, etc. for this trip.

Step 8: For **Report/Trip Purpose** dropdown, select Blanket Travel (Mileage and Parking).


Report/Trip Purpose *

Blanket Travel (Mileage and Parking)

Step 9: For **Event Name / Business Purpose** field, type Blanket Travel and your business purpose for driving.

Event Name/Business Purpose

Blanket Travel for meeting at the Chancellor's Office and Pomona



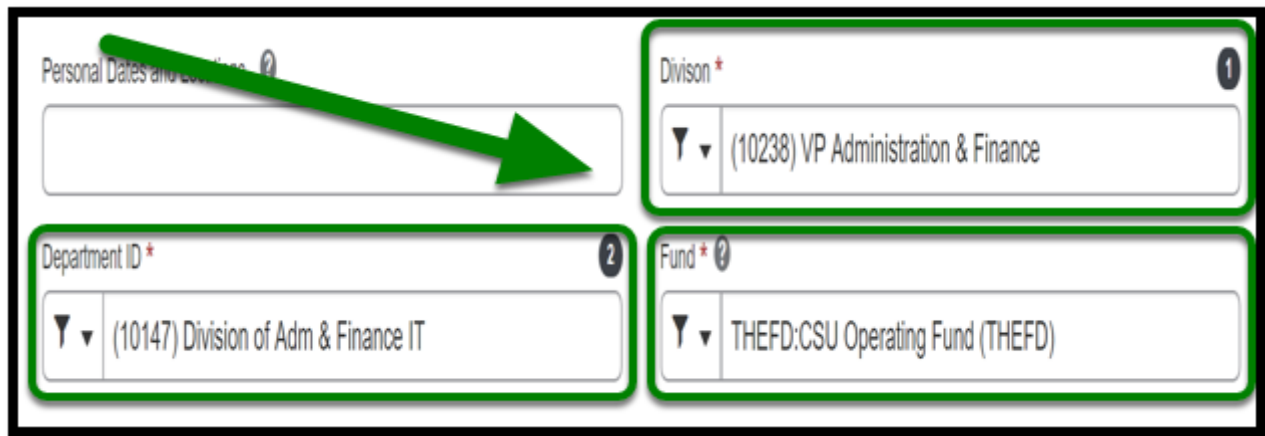
i If there are various events/business purposes during one month, the event/purpose for each expense must be noted on the Expense Report.

Step 10: For **Mailing Address Current?** check the box if your residential address is current in Accounts Payable System to mail your reimbursement check.

☒ Mailing Address Current?

i Please contact travel@fullerton.edu to update your residential address if you do not have direct deposit set-up with Accounts Payable.

Step 11: For **Division, Department ID, and Fund**, make sure you have selected the correct options.



The screenshot shows a form with four fields. The 'Personal Dates and Location' field is at the top left. A green arrow points from it to the 'Division' field. The 'Division' field is a dropdown menu with the selected option '(10238) VP Administration & Finance'. Below it are two more dropdown menus: 'Department ID' with the selected option '(10147) Division of Adm & Finance IT', and 'Fund' with the selected option 'THEFD:CSU Operating Fund (THEFD)'. Each of these three dropdown menus is highlighted with a green border.

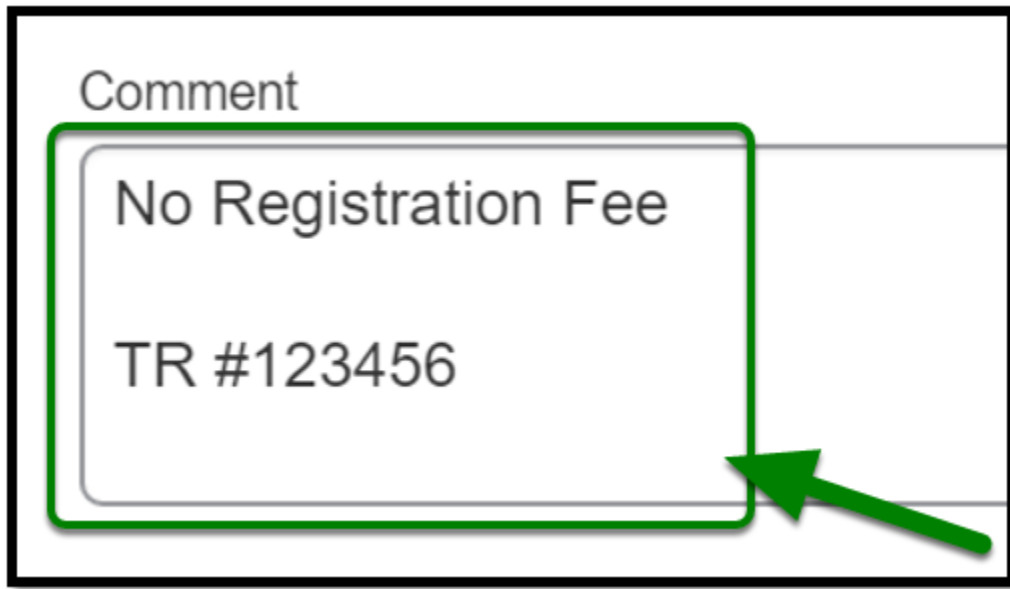
Step 12: Enter in the **Comment** section if you have the following:

- No Registration Fee for training, workshop, conference, etc.
- Have approved paper Blanket Travel Request - List the TR#

Comment

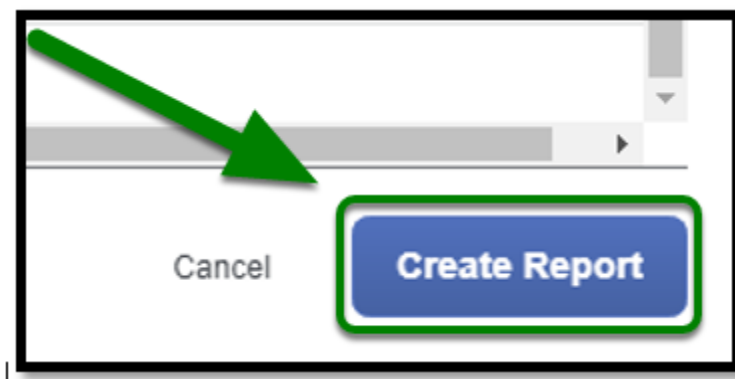
No Registration Fee

TR #123456



i If you have a registration fee, please make sure you create a Travel Request, and add it to Travel Expense Report.

Step 13: Once you have filled everything out, click on the **Create Report** button.



Step 14: To confirm that your travel request has been linked to your expense report, you will see a Request box listed under the Report Details.



i Refer to [Linking Travel Request](#) for more information on linking your Blanket Travel Request to your expense report.


Step 15: Once you click on the Request box, you will see your travel request linked to your expense report.

| Requests | | | | | | x |
|--|------------|-----------|---------------|----------|-----------|---|
| <div>Add Remove</div> | | | | | | |
| <input type="checkbox"/> Request Name | Request ID | Cancelled | Request Total | Approved | Remaining | |
| <input type="checkbox"/> Blanket Travel FY 2018-2019 | 36GL | No | \$300.34 | \$300.34 | \$300.34 | |

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Linking Paper Blanket Travel Request

This section will cover how to attach an approved paper Blanket Travel Request if your Department or College recently went live with Concur. This process can be [skipped](#) if you do not have a paper Blanket Travel Request.

 For instructions on how to link your paper blanket travel request, go to [Attaching an Approved Paper Blanket Travel Request to an Expense Report](#)

Adding Expenses

For every Expense Report you create, you will be required to input any expenses that incurred for the month that you are reconciling your expenses.

 For instructions on how to add the expenses, click on [Adding Blanket Travel Expenses](#).


Submit Blanket Expense Report

Once you have added all of your expenses, click on **Submit Report** and it will be sent to your approver(s).



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Blanket Travel Expense Report Checklist

 If you would like to use a checklist, click on [Blanket Travel Expense Report Checklist](#).

Need more help?

 Contact Concur Support at concur@fullerton.edu or at 657-278-3600.