

Non-Employee Travel - Quick Start Guide for Travel Arrangers

This quick start guide is not intended to be a substitute for adequate travel training. It is a reference guide for those Travel Arrangers who may have to arrange non-employee travel. Please note that all travel must comply with University Travel policy.

There are 6 sequential steps that should be followed in order to setup travel for non-employees. They are:

1. Requesting relevant information from party sponsoring non-employee traveler
2. Contacting the non-employee to obtain all required information related to their travel;
3. Setting up the non-employee as a supplier so that you can book travel for them, and reimburse them for any out of pocket expenses;
4. Arranging travel on behalf of the non-employee;
5. Reconciling any prepaid travel in the university's travel system, Chrome River; and
6. Obtaining receipts for out of pocket expenses from the non-employee and submitting an expense report for them

Each step is described in detail below, with links to relevant resources.

1. Request the following information from the party sponsoring the non-employee traveler

- Account number, sub account number to be charged
- Cost limits, if applicable
- Contact information for non-employee traveler
- Other relevant details specific to trip

2. Contact the non-employee traveler to obtain information related to their travel

Use fillable PDF form available on the Travel website at:

Information that should be obtained includes:

- Legal Name as it appears on your driver's license or passport
- Full Address
- Email address
- Phone, if they prefer to be contacted via phone
- Trip dates
- Travel locations: To and from
- Whether they are interested in being reimbursed via direct deposit
- Which expenses will be prepaid by IU, for example airfare, lodging, ground travel, etc.

3. Setup the non-employee as a supplier in Buy.IU

It is important to complete this step before arranging travel, because supplier requests require approval by a Purchasing work group and will not be immediately available. Submit requests as soon as possible to avoid a delay in obtaining the supplier number. Instructions for setting up a non-employee traveler as a supplier can be found at:

<https://iutransport.iu.edu/pdf/CR-Add-Traveler.pdf>

4. Arrange prepaid travel that non-employee elected on form in step 1.

a. Travel arrangers can utilize the Egencia Guest Account to make travel arrangements for non-employees. Please note that it is not necessary to create a new account for each guest. Guests do not have access to their own accounts on IU's Egencia site. Contact travel@iu.edu to request a guest account. It will appear in Egencia as GUEST (your username) Guest, *example: GUEST Jane Smith Guest*.

b. Airfare:

Airfare should be booked using Egencia. You must book the airfare using your Egencia guest account.

c. Lodging:

Lodging can be booked through Egencia (preferred) or a valid IU Direct Bill Hotel

- Egencia: Follow the instructions above for using Egencia to arrange lodging.
- Direct bill hotels:
 - Direct bill hotels are hotels located near each campus that we have accounts setup in which they bill Indiana University directly. You must have the following information in order to arrange for the guest's accommodations:
 - Non-employees supplier ID number obtained in step 1,
 - Departmental account number to be charged
 - A list of direct bill hotels by campus, rates and contact information can be found at: <https://travel.iu.edu/hotel/hotelrates.shtml>

d. Ground Travel:

Ground travel for the Bloomington campus can be arranged with either Classic Touch Limousine or Go Express Limousine. Specific information needed for each service is below:

- Classic Touch Limo is booked under the **travel arranger's University ID** number, and the departmental account number to be charged
- Go Express Limo is booked under the **non-employee's supplier ID** number obtained in step 1, and the departmental account number to be charged
- Contact information and rates for each service can be found at: <https://travel.iu.edu/traveling/limo.shtml>

5. Reconcile any prepaid travel in the university's travel system

Go Express and direct bill hotel charges do not appear in the Travel Arrangers eWallet in Chrome River. They are paid directly by Travel Management Services. Therefore, they do not need to be reconciled.

Egencia and Classic Touch charges will be assigned to the arranger's eWallet in Chrome River. The Travel Arranger must reconcile these charges by creating a non-employee expense report and assigning reconciling charges to the report. If non-employee traveler is traveling within the next 2 weeks, may be combined with step 6 below. If the non-employee is not traveling in the near future, prepaid expenses must be reconciled on a separate report within 2 weeks. Instructions for reconciling prepaid travel expenses can be found at: <https://travel.iu.edu/pdf/Reconciling-Pre-Paid-Expenses.pdf>

6. Obtain travel receipts and submit expense report

Once the non-employee completes their travel, the Travel Arranger should request receipts for approved out of pocket expenses that the non-employee incurred. Once all the receipts have been received, the Travel Arranger should create and complete an expense report in order to reimburse the non-employee. Some items of note:

- Non-employee must be setup as a supplier with a supplier ID number in BuyIU prior to the expense report being created and reconciled (step 2, above)
- If the non-employee wants to be reimbursed via direct deposit, they should have responded to an email authorizing them to set that up in BuyIU. If they have not done so prior to the payment being processed, they will be reimbursed by check that is mailed to their address on record.
- If the trip is arranged within 2 weeks of when the non-employee actually travels, step 5 can be combined with step 4. Only one expense report needs to be submitted and reconciled under those circumstances.
- A video describing how to create and reconcile one of these reports can be found at: https://iu.mediaspace.kaltura.com/media/Non-Employee+Non-Student+Travel/1_2ui2m6se

Please note, some of the information in the video related to setting up a supplier ID number is outdated, although the rest of the information is correct.