HELPFUL HINTS

- A Blanket Travel Authorization (BTA) provides authorization for employee travel for trips with the same business purpose, which can consist of multiple trips throughout a fiscal year.
- A BTA allows travelers to submit a request for mileage to be used multiple times throughout the designated timeframe.
- BTA expense report can be created at any time during the calendar year; however, all BTA’s expire at the end of the fiscal year (June 30).
- Depending on the circumstances of the trip, a BTA may contain lodging and meals.

PROCEDURE

From the request library in Concur, click on the approved travel request.

From the open travel request, click [Create Expense Report].

[Image of Concur interface with highlighted options]
A new expense report is generated. Click to view the alert. The notification will state “the report header is missing data...”.

The alert indicates the report header needs to be updated with departure time and arrive time. Click View to open the report header.

Update the report name if needed. Change the dates to reflect the dates of the trip. Enter the departure time and arrive time, then scroll to the bottom of the page.
Click Yes if meals or lodging will be added to the report and continue creating the expense report (instructions located here). If the expense report is mileage-only, click No.

Claim Travel Allowance
Expense reports containing meals or lodging require a daily itinerary be created. Select ‘Yes’ if this expense report includes meals or lodging and you are ready to create an itinerary now. Select ‘No’ if meals or lodging will not be included on this report OR you wish to skip this step (and will access the itinerary screen at a later time).

☐ Yes, I want to claim Travel Allowance
☒ No, I do not want to claim Travel Allowance

Click Add Expense. For a mileage only BTA, select mileage/personal car from the expense types.

Enter the required fields for the transaction, which are indicated with a red asterisk (*). For a one-day trip, enter the date of travel in the transaction date. For multiple days, enter the last date traveled for expenses associated with the report.

Tip: Use the mileage calculator to provide an accurate mileage count.

Click Save Expense. The amount for the mileage-only expense report is calculated.

Once the report is complete, click Submit Report.