



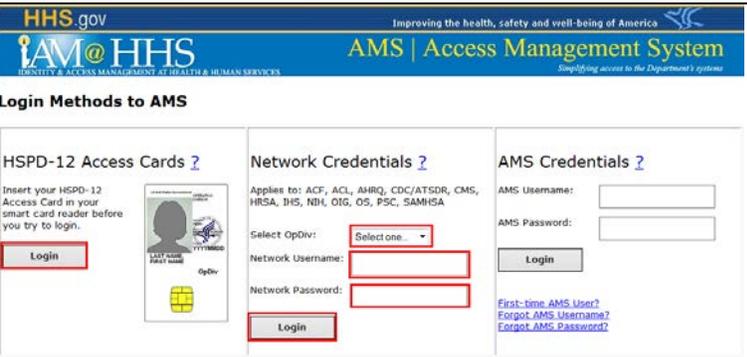
Concur Government Edition (CGE) Job Aid: Creating a profile for an Invitational Traveler in CGE.

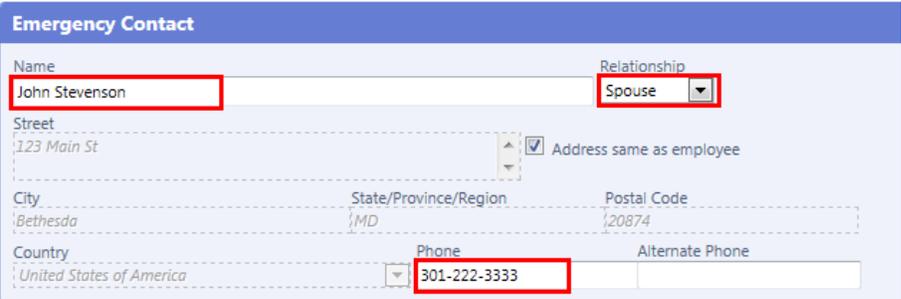
Purpose: To provide a step-by-step guide to creating a profile for a non-Federal Traveler (aka Invitational, Guest, Patient Traveler) who is traveling on behalf of the federal government.

Audience: Lead FATAs and Travel Arrangers (Preparers)

Note: Steps 1 through 5 must be performed by a Lead FATA. Steps 6 through 17 can be performed by a Travel Arranger.

Instruction:
<p>Step 1: Request Invitational Traveler Form</p> <p>The Invitational Traveler form can be requested through the OpDiv/StaffDiv Lead FATAs. Lead FATAs can request a copy of the form from their Transportation Services Account Manager.</p>
<p>Step 2: Complete Invitational Traveler Form</p> <p>Fill in the Traveler’s information. Be sure to provide the same information that was provided to the OpDiv/StaffDiv financial system for the Traveler. This will also include the “Host” for the Traveler. The Host is the User who can prepare travel and sign documents on behalf of the Traveler. The Host also determines the Org, Group Membership, and Routing Lists for the Traveler.</p>
<p>Step 3: Submit Form to Transportation Services</p> <p>The Lead FATA (or designee) submits the completed form to the Transportation Services Account Manager. Forms must be submitted by noon on Monday in order to be available by COB Thursdays. If any information is incomplete or incorrect the form will be returned to the Lead FATA for correction.</p>
<p>Step 4: Profile Created by Transportation Services</p> <p>Transportation Services will import the Traveler’s information into CGE and create the profile. The profile will sync with the Traveler’s information in the financial system.</p>
<p>Step 5: FATA Receives Traveler’s Profile</p> <p>The Lead FATA (or designee) will be notified when the profile is complete and will receive the Traveler’s CGE User Name and Identification number. The FATA or Arranger can now create a travel reservation for the Traveler. They will be prompted to verify and update the Traveler’s profile (Steps 8-17).</p> <p>Important Note: For an emergency Invitational Traveler (will travel within 3 business days), the Lead FATA (or designee) may enter the profile directly into CGE populating only the required fields. See Module 5: User Profiles in the FATA Training Manual for this process. This will enable the Travel Management Center (TMC) to create a travel reservation for this Traveler. Contact the TMC directly to book and ticket the reservation. Verbal approval is required. The form must still be submitted to the TS Account Manager with a note stating that a manually created profile already exists. The full profile will then be created by TS and the FATA will be notified. An Authorization and Voucher can only be successfully created and submitted after TS has completed the profile.</p>

<p>Instruction:</p> <p>Step 6: Log into AMS Log into CGE via AMS using either your PIV card or your network username and password.</p> <p>Note: AMS can be accessed through the HHS intranet or via the internet at https://ams.hhs.gov</p>	<p>Screenshot:</p> 
<p>Step 7: Select CGE From the Home page of AMS, select the E-Travel link.</p>	
<p>Step 8: Locate Traveler Next to the “You are administering travel for” field, select the Search button.</p>	
<p>Step 9 continued: Locate Traveler Enter the last name of the Traveler in the “You are administering travel for” field. Select the name from the list that is displayed below and then select OK.</p>	
<p>Step 10: Select Profile Tab Select the Profile tab to continuing updating the profile</p>	
<p>Step 11: Select Personal Information Select the Personal Information link.</p>	<p>Select one of the following to customize your user profile.</p> <p>Personal Information Your home address and emergency contact information.</p> <p>Agency Information Your company name and business address or your remote location address.</p> <p>Credit Card Information You can store your credit card information here so you don't have to re-enter it each time you purchase an item or service.</p> <p>Change Password Change your password.</p>

<p>Instruction:</p> <p>Step 12: Enter Emergency Contact Scroll down to the Emergency Contact section and enter the name, relationship, and phone number of the contact. If the address is not the same as the Traveler, uncheck the “Address same as employee” box and enter the contacts address.</p>	<p>Screenshot:</p> 
<p>Step 13: (Optional) Choose Travel Preferences Enter any information that you would like the airline, hotel, or car vendor to see, i.e., wheelchair accessible room. However, this does not affect the search results when booking travel for this Traveler.</p>	<p>Travel Preferences</p> <p>Eligible for the following discount travel rates/fare classes <input type="checkbox"/> AAA/CAA <input type="checkbox"/> Government <input type="checkbox"/> Military <input type="checkbox"/> Senior/AARP</p> <p>Air Travel Preferences Seat: Don't Care Special Meals: Regular Meal Ticket Delivery: E-ticket when possible Preferred Departure Airport: Other Air Travel Preferences: Medical Alerts: </p> <p>Hotel Preferences Room Type: Don't Care Smoking Preference: Don't Care Message to Vendor: Foam pillows: I prefer hotel that has: <input type="checkbox"/> a gym <input type="checkbox"/> a pool <input type="checkbox"/> a restaurant <input type="checkbox"/> room service <input type="checkbox"/> Early Check-in</p> <p>Accessibility Needs <input checked="" type="checkbox"/> Wheelchair access <input type="checkbox"/> Blind accessible</p> <p>Car Rental Preferences Car Type: Any Car Class Smoking Preference: Don't Care Car Transmission: Automatic Message to Vendor: </p>
<p>Step 14: (Optional) Add Frequent Traveler Programs Add any traveler rewards programs by selecting the Add a Program link and entering in the number.</p>	<p>Frequent-Traveler Programs Your Frequent Traveler, Driver, and Hotel Guest Programs</p> 
<p>Step 15: Update TSA Secure Flight Information Verify and update the Gender, Date of Birth, and TSA Pre Check information of the Traveler (if available). If needed, enter the Traveler’s passport information. If they do not have, or will not need a passport, check the box next to “I do not have a passport”.</p> <p>Note: This information must match the Traveler’s legal form of identification in order to clear TSA security.</p>	<p>TSA Secure Flight The Transportation Security Authority (TSA) requires us to transmit information collected from you. Providing information is required. If it is not provided, you may be subject to additional screening or denied transport or authorization. TSA may share information you provide with law enforcement or intelligence agencies or others under its records notice. For more on TSA privacy policies or to view the records notice and the privacy impact assessment, see the TSA’s web site at www.TSA.GOV.</p> <p>Gender (Required): <input checked="" type="radio"/> Male <input type="radio"/> Female Date of Birth (mm/dd/yyyy) (Required): 04/21/1995 DHS Redress No: TSA Pre✓ Known Traveler Number: </p> <p>International Travel Adding your passport information to your profile will allow us to include it in your reservations. Having this information in your reservation can make international travel a little easier.</p> <p><input checked="" type="checkbox"/> do not have a passport</p> <p>Passport Nationality: Passport Number: Passport Date Issued (mm/dd/yyyy): Passport Expiration (mm/dd/yyyy): Passport Place Issued (City, State): Passport Place Issued (Country): </p> <p>If you can claim citizenship in more than one country, you have the option of adding a second passport here.</p> <p>Passport Nationality: Passport Number: Passport Date Issued (mm/dd/yyyy): Passport Expiration (mm/dd/yyyy): Passport Place Issued (City, State): Passport Place Issued (Country): </p>

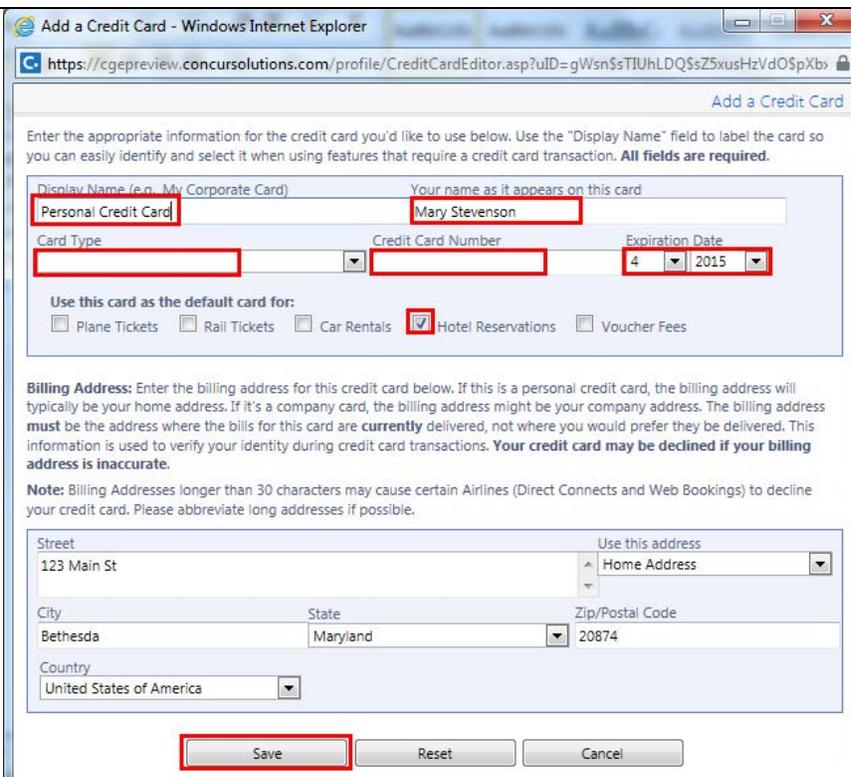
Step 16: (Optional) Add Credit Cards

To add the Traveler's credit card, select the Add a Credit Card link. A credit card is needed if the Host will be booking a hotel for the Traveler through CGE.



Step 17: Enter Credit Card information

In the Display Name field, enter the name of the card as you would like it to appear in CGE, i.e., Personal Credit Card. Enter the name as it appears on the card. Enter the Card Type, Number, and the Expiration Date. Check the box next to Hotel Reservations to indicate that this should be used when booking a hotel through CGE. Verify the billing address for this card and update as needed. Then select Save.



You have successfully created a profile for an Invitational Traveler in CGE!

You are now ready to book travel for this Traveler. Refer to the job aid entitled "Booking a Travel Reservation in CGE".