

CMDI Finance's

How to Book / Pay for Travel for a Guest Speaker

Once you've confirmed the non-employee guest who will be traveling to CU Boulder, here are the steps you should take to ensure they have a smooth trip and you have an easier time reconciling their expenses.

 **Step 1: Book Travel** - <https://www.cu.edu/psc/travel/>

Flights

While a non-employee can purchase airfare on their own and seek reimbursement, it is often more practical for us to book it for them directly. After collecting the information listed below, you can either contact the Christopherson Business travel agents or fill out a form to authorize the non-employee to book their own flight.

To book, you'll need:

- Full name (as it appears on their ID or passport)
- Date of birth
- Gender (must be listed as male or female per TSA regulation)
- U.S. citizenship status
- Email and phone number
- Frequent flyer number, KTN, or Global Entry (if applicable)
- A **speedtype** for billing (note: this speedtype is only a placeholder used to book the flight. This speedtype can be easily changed when you reconcile the expense in Concur)

⇒ Christopherson Business Travel Contact information:

<https://www.cu.edu/psc/travel/booking-travel/full-service-booking-through-agent>

⇒ Link to form authorizing the non-employee to book the flight themselves:

<https://legacy.cbtravel.com/business/request/cuttravel/>

Hotel

Use [CU Boulder's preferred hotel list](#) to find the best rates. Book the hotel using the contact information on the preferred hotel list and provide your Travel Card for the reservation. Remind them that the reservation should be tax-exempt. Then, before the guest's arrival, notify the hotel

front desk that they should collect a secondary personal card from the guest to be used for incidentals and other room charges.

NOTE: Room service/food charges should not be paid on the Travel Card for non-employees.

NOTE: All Colorado hotel transactions must be tax-exempt. If you use the travel card and the hotel charges tax, you will need to request that they refund the tax before you can reconcile the expense in Concur.

After the guest checks out, follow up with the hotel to request the folio if it is not automatically generated.

Ground Transportation

CU does not have a preferred method of transportation for guests traveling between Boulder and DIA. The best option often depends on timing and your budget for the visit.

- Lyft: Lyft is the University's preferred rideshare company, as all employees can sign up for a Lyft business account: <https://www.cu.edu/psc/travel/booking-travel/rideshare>
 - You can set up prearranged rides for non-employees, charged to your travel card and the receipt sent directly to your Concur profile
 - You can issue ride passes to the non-employee's Lyft account for use while in town, also charged to your travel card, and the receipt will be sent directly to your Concur profile
- Uber/Taxi: Acceptable, but often the most expensive option. The non-employee must submit an itemized receipt and seek reimbursement after the trip.
- Airport Shuttles: You can use a P-card or Travel Card to pay for a non-employee's trip on an airport shuttle service
- Rental Car: You can [use Concur Travel to book a rental car](#) for your guest using the University's discounted rates. However, the car companies usually require payment at the time the reservation starts, requiring the non-employee to provide their personal card and seek reimbursement later. This usually is not an issue for U.S. citizens, but it can be difficult for international guests.
- Mileage: A CU employee can pick up/drop off a non-employee guest and seek mileage reimbursement. This option is attractive to some teams as it allows additional conversation time with the guest and can add a personal touch to their visit.

Step 3: Handle Per Diem

Guests are eligible for per diem up to the current [Boulder rates](#). This is reimbursed **after the trip** via the CMDI Travel Form. Remember:

- No receipts are needed for food purchased by non-employees for themselves.
- You can specify if you want them only to receive partial per diem.
- Employees cannot pay for a non-employee meal using a P-card or Travel Card unless it's part of an **Official Function**.

Step 4: Reconcile Expenses Post Trip

Within 30 days of the guest's departure date, upload all receipts to Concur and submit the [CMDI Travel Form](#) to record all expenses. If the guest requires reimbursement, the form provides space to provide their mailing address. If the guest is a non-US citizen, we are required to collect additional paperwork to provide reimbursement (see below), so it is often more practical to avoid reimbursing them by paying for their travel expenses on your travel card.

Pay an Honorarium (if applicable)

All Guests Must Be Registered Vendors in Marketplace

If you wish to pay your guest an honorarium for their visit, they must register as an individual supplier in CU's Marketplace system. This applies to both U.S. and international guests. Department admins or CMDI Finance can [start this process in Marketplace](#) using the following information:

- Full name
- Email address
- Phone number
- Mailing address
- U.S. citizen status (Y/N)

Once submitted, they'll receive an email from noreply@jaggaer.com with the subject line *"Supplier Invitation to University of Colorado."* Ask them to check their spam folder just in case!

Some guests have difficulty navigating this process, which can delay the timeline it takes for them to receive payment. If possible, have them complete the registration while they are in person so you can assist them with any challenges that may arise.

For International Guests

International guests must submit the following documents:

- Passport photo page
- I-94 (available at i94.cbp.dhs.gov)
- W-8BEN form (from the IRS website)
- A signed [Compliance Statement](#)

They'll also need to complete a **Wire Transfer Form**, which CMDI Finance can send via **DocuSign**. Never ask them to send banking info via email.

Let them know:

- The IRS will withhold a **30% tax** from their honorarium.
- They'll receive a **tax receipt** from CU at the beginning of the following calendar year.
- They may file for a refund with the IRS, but CU cannot assist with this process.
- This applies only to international guests who participate in person.



Final Step: Submit the Honorarium Request

Once all documents are collected, submit the request using the [CMDI Honorarium Form](#) and send all required documentation to CMDI Finance. This applies to both domestic and international guests.

Questions? Contact CMDIFinance@colorado.edu

⚠ Important Reminder: Be very careful when using a **P-card** for non-employee expenses.

Suppose you accidentally use your P-card for an unallowable charge. In that case, you'll need to either get the vendor to refund the charge and reprocess it on the correct card or reimburse the University yourself and then seek personal reimbursement. Always double-check before swiping!

	P-Card		Travel Card		Notes
	Employee	Non-Employee	Employee	Non-Employee	
Conference Registration	Yes	Yes	Yes	Yes	If purchased with a P-Card, reconcile it within 30 days of purchase. If purchased with a T-Card, wait to reconcile until after the conference.
Visa/ Passport Fees	Yes	Yes	Yes	Yes	
Lodging Deposit	No	No	Yes	Yes	
Lodging	No	No	Yes	Yes	Receipt must be itemized by nightly rate, taxes, and additional costs.
Airfare	No	No	No	No	Airfare must be purchased through Concur or Christopherson Business Travel.
Seat Fees	No	No	Yes	Yes	Only permissible for Economy class if choosing a seat requires payment.
Luggage Fees	No	No	Yes	Yes	
Car Rental	No	No	Yes	Yes	Car rental reservations must go through Concur, employee or non-employee alike, to receive CU's discount and insurance. Car rentals are paid with a travel card or personal card at the time of the rental.
Ground Transportation	No	Yes	Yes	Yes	Taxis, buses, trains, airport shuttles, etc.
Parking	No	Yes	Yes	Yes	If parking at DIA, use the University's discount programs.
Meals	No	No, unless Official Function	Yes	No	No receipts are necessary for personal meals in travel status.