

“How will you book your Trip?”

Agent Assist – Traveler will be using an actual Travel Agent at Travel Leaders Corporation (TLC) to book travel. Traveler will need to contact the Travel Agent using the information on the UMB Travel Website.

Book in Concur – This is the required method to book air travel unless using Agent Assist. It allows the user to book flights on-line within Concur similar to other on-line flight booking websites.

No Booking – Traveler will not use Concur or the live agent to book any travel. Travelers should not select this option if they will book airfare that will be paid by UMB. This option should be used if UMB is not paying for any of the travel expenses.

Exception Booking – Traveler is requesting permission to book airfare outside Concur as a departure from Travel Policy. Routes to CBFO for approval. See below.

Additional Information on Use of “Exception Booking”

UMB Travel [Policy](#) requires most¹ airfare to be booked in Concur. Selecting the “Exception Booking” type is the mechanism by which travelers may request a deviation from that policy. This is intended to be used in uncommon scenarios where there is a valid obstacle to booking in Concur and is not to be used for traveler preference. A **detailed** explanation of the circumstances must be included within the request. Use of this booking type should be **very rare** (most travelers will never have a reason to use this booking type).

The following scenarios would **NOT** be an appropriate use of “Exception Booking”:

- 1) Traveler was unaware of rule and already bought plane ticket.
 - *Exception Booking should not be used because this would delay travel authorization if denied. Traveler should select “No Booking” and proceed with obtaining an approved Travel Authorization Request (TAR) before trip departure. After travel the “Justification for not booking Air in Concur” field of the expense report can be completed with as much detail as possible for CBFO consideration. It should be noted that lack of awareness of the policy is generally not an acceptable justification, and the expense may be denied.*
- 2) Traveler wants to pay out of pocket and get reimbursed.
 - *Travelers can use their preferred payment method when checking out within Concur’s on-line booking tool or when using Agent Assist. Note that airfare paid out of pocket will not be reimbursed until after the dates of travel.*
- 3) Traveler’s family is accompanying them on trip.
 - *Traveler can select Agent Assist and inform the agent that they would like to pay out of pocket for additional non-business travelers. Alternatively, traveler can book in Concur, then separately make arrangements for their family and contact the airline to link the reservations.*
- 4) Airfare booked prior to Concur go-live.
 - *If airfare was booked before 4/10/23 it is not necessary to use Exception Booking. Traveler should select “No Booking” and proceed with obtaining an approved travel request before trip departure. After travel the “Justification for not booking Air in Concur” field of their expense report must be completed to indicate “booked before go-live”. Supporting documentation must show date of purchase.*

¹ Airfare **must** be booked using the UMB Travel and Expense System, **except** under either of the following conditions:

- Purchasing airfare for regional travel between two or more foreign countries (i.e. where the countries of departure, transit (as applicable), and destination do not include the U.S.). All legs of flight travel departing from, transiting through, or arriving to the U.S. must be purchased through the UMB Travel and Expense System.
- Travel that is not paid with [UMB Funds](#).