

# Flight Reservation Guide

# Need to BOOK a FLIGHT?

**Note: submit requests at least 14  
business days from date of travel**

**Traveler can choose to pay for the flight on their own and ask for reimbursement after the trip.**

**Please note that before you do this, make sure to get pre-approval to confirm that you can be reimbursed.**

If you **do not want to pay out-of-pocket**, please follow the steps outlined in the following slides

Please note that these steps could change depending on:

1. Guidance we receive
2. Process improvement

# Flight Reservation Form

- Please use the IoES Flight Reservation Form
- You can find this in the IoES website under Administrative Resources
- The next slides will go through the form step by step

UCLA Institute of the Environment & Sustainability Flight Reservation Form			
<b>PLEASE SUBMIT REQUEST AT LEAST 14 BUSINESS DAYS BEFORE DATE OF TRAVEL</b>			
<b>Traveler Responsibilities:</b>			
1. Traveler is responsible for completing this form and getting PI or advisor and fund manager or CAO approval.			
2. Once the purchaser has given you your Concur ID, it is the traveler's responsibility to call UC Travel to book the flight.			
3. Traveler is responsible for following up flight confirmation/ticket reservation from UC Travel.			
4. Traveler is responsible for submitting all receipts related to this trip within 30 days from return from travel.			
<b>STEP 1: SEARCH FOR PREFERRED FLIGHT</b>			
<b>Reminder:</b>			
* Seat class must be economy unless prior approval from management has been given to upgrade seat class.			
<b>STEP 2: BUSINESS JUSTIFICATION (Please answer who, what where, when, why. No acronyms.)</b>			
<b>STEP 3: TRAVELER INFORMATION</b>			
<b>Reminder:</b>			
* Please ensure that your name on the form matches what is on your ID/Passport.			
<b>UCLA TRAVELER</b>		<b>NON-UCLA TRAVELER</b>	
Name (exact match to your passport):		Name (exact match to your passport):	
Employee ID #:		Email Address:	
UID #:		Mailing Address:	
Email Address:		Zelle/Phone Number:	
Phone Number:		Company/Affiliation:	
<b>STEP 4: TRIP INFORMATION</b>			
<b>Reminders:</b>			
* This is based on the search you made (see step 1). UC Travel will try their best to accommodate exact flight request.			
* Please send screenshot of desired flight/s.			
<b>DEPARTURE</b>		<b>RETURN</b>	
FROM:		FROM:	
TO:		TO:	
AIRLINE:		AIRLINE:	
FLIGHT NUMBER:		FLIGHT NUMBER:	
DEPARTURE DATE:		DEPARTURE DATE:	
DEPARTURE TIME:		DEPARTURE TIME:	
ARRIVAL DATE:		ARRIVAL DATE:	
ARRIVAL TIME:		ARRIVAL TIME:	
SEAT CLASS:		SEAT CLASS:	
<b>TOTAL ESTIMATED COST FOR ENTIRE TRIP:</b>			
<b>STEP 5: SAVE AS PDF AND INCLUDE A SCREENSHOT OF YOUR DESIRED FLIGHT.</b>			
<b>STEP 6: GET APPROVALS FROM PI OR ADVISOR AND FUND MANAGER OR CAO.</b>			
<b>Reminder:</b>			
* Complete this section before sending to purchaser.			
Project 1:	Project 2:	Project 3:	
FAU# 1:	FAU# 2:	FAU# 3:	
% OF COST:	% OF COST:	% OF COST:	
PI/Advisor Name & Signature:		Fund Manager/CAO Name & Signature:	
<b>Only complete forms will be processed.</b>			
<b>STEP 7: SEND TO purchasing@ioes.ucla.edu FOR PROCESSING.</b>			
<b>STEP 8: PURCHASER WILL PROVIDE YOU WITH YOUR CONCUR ID.</b>			
<b>STEP 9: CALL UC TRAVEL TO BOOK YOUR FLIGHT AND PROVIDE THEM WITH YOUR CONCUR ID.</b>			
<b>STEP 10: WAIT FOR FLIGHT CONFIRMATION/TICKET RESERVATION FROM UC TRAVEL (sent directly to travel by email.)</b>			
<b>END OF TRIP - Reminder to send ALL receipts associated to this trip to the purchaser within 30 days from return from travel.</b>			

# Step 1: Search for Flights

- Start by searching for the flight you prefer (usually through Google)
- Note that you must choose an economy seat class
  - To upgrade seats, you need prior approval from management
- Take note of the following info:
  - Departure Date/Time/Airport
  - Return Date/Time/Airport
  - Estimated Cost (whatever you find on Google is okay)

# Step 2: Business Justification

- Have your business justification ready.
- Take note of our business justification guidance:
  - Who is traveling?
  - What is the trip for?
  - Where are they going?
  - When is the trip?
  - Why are they going?

**REMEMBER: NO ACRONYMS!**

## EXAMPLE:

Climate Conference 2024 held in Washington, DC from April 17-21, 2024. Annual conference for climate experts. Activities include panelists, poster presentations, and networking sessions to enhance knowledge on the field of environment and climate science.

# Step 3: Traveler Information

## UCLA Traveler:

- Prepare the following info:
  - Name (exact match to your passport or ID)
  - Employee ID/UID
  - Email address
  - Phone Number

## Non-UCLA Traveler:

- Prepare the following info:
  - Name (exact match to your passport or ID)
  - Email address
  - Mailing Address
  - Zelle/Phone Number
  - Company/Affiliation



# Step 4: Trip Information

- Provide the following information for both Departure and Return:
  - From
  - To
  - Airline
  - Flight Number
  - Departure Date & Time
  - Arrival Date & Time
  - Seat Class
  - **Total Estimated Cost for Entire Trip**

Note:

UC Travel will try their best to accommodate exact flight request

# Step 5: Save as PDF

- Save the form as PDF
- Include the screenshot of your desired flight/s

# Step 6: Submit form for approval & FAU

- Get your PI or Advisor's approval on the form
- Send to fund manager or CAO for FAU and approval

# Step 7: Processing

- Fund Manager or CAO will send the request to [Purchasing@ioes.ucla.edu](mailto:Purchasing@ioes.ucla.edu) for processing

## Step 8: CONCUR ID

- Once the purchaser has processed your request, a CONCUR ID will be generated.
- Purchaser will provide traveler with the Concur ID.
- The Concur ID is the “form of payment” you will use to pay for your flight.

# Step 9: Traveler to contact UC Travel

- Once you have the Concur ID, contact UC Travel at [travel@finance.ucla.edu](mailto:travel@finance.ucla.edu)
  - You can also contact them by phone at 310-206-2639 (but many have noted that email is the best way to go)
- You arrange your flight preference with UC Travel and when they ask for payment, you will provide them your Concur ID

# Step 10: Flight Confirmed

- UC Travel will email you your flight confirmation/ ticket reservation directly.
- Once received, you're all set!

# At the end of your trip...

- You must submit all your receipts for reimbursement associated with this trip to the purchaser within 30 days from end of your trip.



## **Please note:**

While you can make travel reservations directly through Concur, we discourage this method as UC Travel requires you to provide Concur ID by 2pm the next day.

Sometimes things happen and this deadline cannot be met.

**It is best that you get your Concur ID ready before you reach out to UC Travel.**

**If you would like the department to pre-pay for your trip, please follow the steps we outlined.**

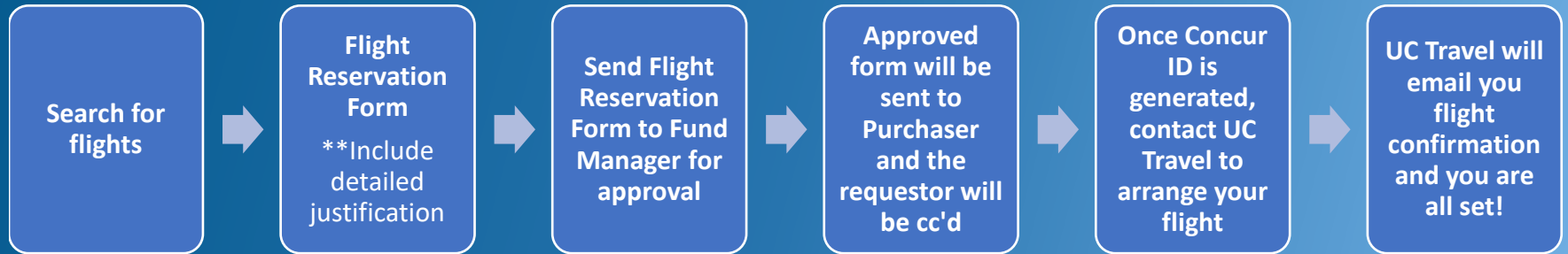
## Reminder:

Once flight is confirmed, any changes to your flight that you need to make must be made **directly with UC Travel.**

# Traveler Responsibilities

- Searching for preferred flight
- Completing request form and getting fund manager/research manager approval
- Calling UC Travel to book flight after receiving Concur ID
- Following up flight confirmation from UC Travel
- Submitting receipts for reimbursement within 30 days from end of trip.

# Easy Flow Chart



**Submit requests to:**  
**[purchasing@ioes.ucla.edu](mailto:purchasing@ioes.ucla.edu)**