



Managing Travel Plans & Expenses

U.S. Travel Policy

- Learn about the [U.S Travel Policy](#), and the tools and resources associated with booking travel, requesting a Corporate Card, and submitting expense reports by reviewing the [Travel & Expenses Basics Guide Book](#).

Preferred Travel Agency

- Egencia is Arthur J. Gallagher's designated [travel agency](#).
- You will have access to 40,000 internet hotel rates
- Book non-stop, lowest non-refundable airfare within a 90 minute window
- Real-time enroute alerts on gate changes, flight delays and other trip disruptions via text, phone or email.

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[TRAVEL & EXPENSES
BASICS GUIDE BOOK](#)



[US TRAVEL SITE](#)



U.S. Travel Site & Resources



Air Travel

Gallagher's preferred travel agency is Egencia.

Air reservations must be ticketed with Gallagher's preferred agencies

Gallagher's Preferred Vendors are American, British Airways and Southwest Airlines.

Egencia counselors are available 24/7/365 @ **(877) 898-2783 or (417) 520-4737**

[TRAVEL AGENCY](#)

[AIR TRAVEL](#)

[EGENCIA](#)



International Travel

Book simple roundtrips online via Egencia (e.g. Chicago to London)

Call travel counselors to book complex multi-stop itineraries

Business class is permissible for overall flight duration > than 10 hours

[INTERNATIONAL TRAVEL](#)



Hotel

Gallagher's hotel program offers 130+ hotels

Preferred hotels near our key offices in Australia, Canada, India, New Zealand, UK, and US

Please select a Preferred Hotel when visiting a Gallagher office. Alternatively, select a hotel priced at or lower than our negotiated rates in the city.

In cities where there are no hotels designated as preferred, watch for the red flag notation next to the hotel name on the Egencia booking site. Click on the flag to see the rate cap for the city and avoid rates that exceed the cap.

[HOTEL](#)



Car Rental

Book rental cars with our preferred providers via Egencia

Preferred Rental Companies:

Hertz - CDP:193549

Avis – CDP: A389200

Budget – CDP: R46850

Enroll in complimentary frequent renter programs for rewards and "counter bypass" Information is on Gallagher One

If you are already a frequent renter member, be sure to update your account with AJG's CDP # listed above

[CAR RENTAL](#)



Corporate American Express Card

- Corporate American Express Cards are issued to employees who travel on company business two or more times annually or spend \$1500+
- Corporate cards may be used exclusively for business expenses
- Employees must manage Amex accounts online
- Amex issues no paper statements!
- Each individual employee is responsible to reconcile the Amex statement and to pay Amex directly for all charges. See [Corporate Card Policy](#).
- Purchases charged to the Amex corporate card flow into the employee's individual Concur account to expedite creation of expense reports
- Employee must attach actual receipts for Amex charges @\$50.00+
- Employee must attach actual receipts for cash and personal charges @\$25.00+
- To Request an American Express Card please contact your Manager.

How to Log an Expense Report

- How to log expense report through **Concur which is Gallagher's expense reporting software**
- To submit an expense report visit the [Concur Website](#)
- If you're on the Gallagher network, you will be logged in automatically
- If you're off the Gallagher network, you'll receive a DUO push notification to authorize access before Concur will log you in
- Concur's Help Desk Contact Information: (866) 793-4040
 - Press 1 for Travel & Expense, then press 1 for Expense
 - AJG's Concur Help Desk Contact Information: ConcurQuestions@ajg.com

Concur Drive Automated Mileage Tracker

- Concur Drive is an SAP mobile app that tracks business mileage through GPS and automatically creates the expense line items for you.
- Log into the app and tap mileage to enable [Concur Drive](#).

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[CONCUR EXPENSE REPORTING SYSTEM](#) >

[CONCUR FAQs](#) >

[CONCUR DRIVE](#) >

Using Concur Tips

Tips and recommendations on submitting expense reports

- Please submit no more than two expense reports each month
- Create and submit expense reports within 30 days of when expense are incurred. Concur does not permit submission of expense reports with transactions older > 90 days. Submit an expense report for airline ticket purchases promptly
- Process reimbursement requests for Donations, Contributions and/or Sponsorships with a check request via GSS Support. Note that these expenses require Divisional CFO approval for reimbursement
- Send all invoices to GSS_Support@ajg.com. Do not submit invoices for payment via Concur or attempt to pay them with the Corporate American Express Card

AVOID

Expense reports are rejected if you:

- Fail to submit a required receipt for a transaction
- Use the wrong expense type for recurrent entries. Concur tracks repeat entries (e.g. if you enter lunch with 10 people at Panera and later enter lunch for yourself at Panera, the system will prompt you to select the correct expense type)...
- Choose expense type of "Seminars & Education" for Licensing and Fees
- Scan all of your receipts to one page vs. attaching individual receipts at the line item level

REMINDER

- Note that receipts are required for business transactions > \$25.00 paid with Cash and/or Personal Credit Card. When needed, find automated Missing Receipt Affidavit in Concur.
- Refer to the Expense Dictionary on your Concur Home Page in the Company Notes section to find the correct code for each expense you are submitting
- Attach individual receipts at the line item level. For meals, attach both card receipt and itemized detail from the restaurant.



Gallagher Preferred Vendors

Every employee is responsible to understand [Gallagher's U.S. Procurement policy](#).

The policy explains when and how to engage strategic sourcing to assist and support vendor selection.

To initiate a request for Sourcing Support, complete the [Sourcing Project Intake Form](#) and send it to [AJG Sourcing Mailbox \(mailbox\)](#)

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[U.S. PROCUREMENT
POLICY](#)



Questions?

If you have any questions at any time about the policies or information shared with you in this resource guide, please go to:

[U.S. TRAVEL SITE](#)

