

Travel: Transportation Security Administration (TSA) Requirements

Travel Service Guide

Last Revised: March 22, 2024

Applies to Concur Travel:

- ☒ Professional/Premium edition
 - ☒ TMC Partners
 - ☒ Direct Customers
- ☒ Standard edition
 - ☒ TMC Partners
 - ☒ Direct Customers

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March 22, 2024	Added <i>Gender Inclusivity Profile Synchronization</i> section.
July 25, 2023	Updated <i>Overview</i> section with note on SAP Concur UI themes; no other changes
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Transportation Security Administration (TSA) Requirements

Section 1: IMPORTANT – About this Guide

Be aware of the following:

- **Infinite variables:** Certain scenarios have an infinite number of variables or extremely unusual circumstances, like rare cancellation or refund situations. So, not all scenarios can be presented in this guide. Also, certain processes may be influenced by third- or fourth-party providers. In some cases, you must contact the provider directly.
- **User interface, fees, rates, schedules:** When other providers change their user interface (for example, web site) or their fees/rates/schedules, they are under no obligation to make SAP Concur aware of those changes. If a screen sample in this guide is outdated because of a change made by a provider, we will update that screen sample when we become aware of the change and at our earliest convenience.
- **Permissions:** A company's admin may or may not have the correct permissions to manage the feature described in this guide. If an admin needs to manage this feature and does not have the proper permissions, they should contact the company's SAP Concur administrator.

Also, the admin should be aware that some of the tasks described in this guide cannot be completed by the company. In this case, the client must contact their TMC (if a TMC provides their support) or SAP Concur (if SAP Concur provides their support).

Section 2: Professional and Standard Travel

This guide discusses both Professional and Standard Travel. In those cases where a feature applies to one but not the other, that difference is noted.

Section 3: Overview

NOTE: Multiple SAP Concur product versions and UI themes are available, so this content might contain images or procedures that do not precisely match your implementation. For example, when SAP Fiori UI themes are implemented, home page navigation is consolidated under the SAP Concur Home menu.

With Secure Flight, TSA will assume responsibility from the airlines for matching passenger names to federal watch lists before flight departures. The requirements are:

- It applies to airlines operating in, to, from (flights originating or ending in the USA), or over the United States (such as from Canada to Mexico).

– and –

- At the time of booking, it is required to collect every passenger's full name (first, middle, and last name), date of birth, and gender.

All information then gathered is passed from the airline to TSA. Airlines, in turn, provide passenger information to TSA to compare to the watch list. The SSR requirements will be written automatically by Concur Travel, based on the information provided for each GDS.

The default name fields will be used for the TSA requirements. You may have several travelers whose legal name on their travel documents do not match the name fields and, subsequently, the name listed on their Frequent Traveler programs. If this is the case, the traveler must modify the name listed on the Frequent Traveler program to continue receiving points from the vendor when reserving through Concur Travel.

Section 4: End-User Experience – Profile

The information that appears in the Concur Travel Profile is based on the **For information required by the TSA for travel to/from the USA** field setting (described in the configuration information in this guide):

- The TSA fields in Profile look like:

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.

Gender **[Required]** Date of Birth (mm/dd/yyyy) **[Required]** DHS Redress No. TSA Pre Known Traveler Number

☐ Male ☐ Female

DHS Redress No. TSA Pre Known Traveler Number

Quick Help

A Redress Number is a unique number that helps TSA eliminate watch list misidentification. If you have a name similar to or the same as a name on the current terrorist watch list, and have experienced secondary security screenings at airports, you will have the option of preventing this in the future by providing your Redress Number at the time of booking. To apply for a Redress Number go to the [TSA web site](#).

The screenshot shows a web form with a field labeled "TSA Pre-Known Traveler Number?". A red circle highlights this field. A "Quick Help" pop-up window is open, providing information about the TSA Pre-Check program. The pop-up text includes: "On Oct. 4, 2011 the Transportation Security Administration (TSA) launched an expedited screening pilot program called TSA Pre-Check. CBP has partnered with TSA on this Department of Homeland Security initiative, which is designed to help TSA focus resources on higher-risk and unknown passengers while expediting the process for lower-risk and known passengers whenever possible." It also states: "The Known Traveler Number is a unique number assigned to 'known travelers' from whom the Federal Government has already conducted a threat assessment and has determined do not pose a security threat." and provides a link: "For more information about this program, or to locate your known traveler number, click here: <http://www.globalentry.gov/tsa.html>".

- The requirement to add the data before the profile can be saved looks like:

The screenshot shows a web form with an error message. The message says: "Your profile cannot be saved until you have corrected the issue(s) listed below. - Date of Birth is required." Below the message is an "OK" button. The form fields include: "Add Ticket Credit", "TSA Secure Flight", "Gender [Required]" (with radio buttons for Male and Female), "Date of Birth (mm/dd/yyyy) [Required]" (with a date picker), "DHS Redress No.", and "TSA Pre-Known Traveler Number?".

NOTE: By default, the **Middle Name** field is open for all travelers to modify, if there is no present value and if the company travel configuration field **For information required by the TSA for travel to/from the USA** is set to one of the "Show" options (described in the configuration information in this guide).

Section 5: End-User Experience – Non-Profiled Traveler

The traveler's date of birth and middle name **must** be accounted for in the non-profiled traveler booking (described in the configuration information in this guide).



For information about the Non-Profile Travel feature, refer to the *Non-Profile Travel Service Guide*.

Unknown Date of Birth

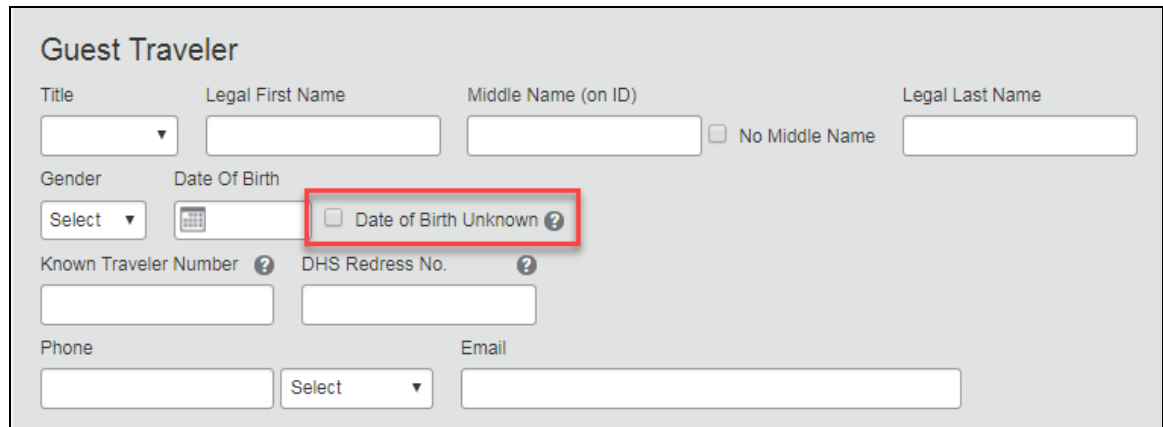
There are times when a non-profiled (or multi-passenger) booking is made and the date of birth of the traveler is not known by the person making the reservation. For example, if a candidate for a position is flying in for an interview, the hiring manager may not know the date of birth of the candidate.

NOTE: Under EEOC regulations in the United States, the hiring manager may not be able to inquire as to the date of birth.

Professional Travel vs Standard Travel

PROFESSIONAL TRAVEL

For Professional Travel, if the **Allow guest bookings when the Date of Birth is unknown** setting is enabled (as described in the configuration information in this guide), the **Guest Traveler** page allows the booker to check the **Date of Birth Unknown** check box instead of completing the **Date of Birth** field.



The screenshot shows the 'Guest Traveler' form. The 'Date of Birth' field is highlighted with a red box, and the 'Date of Birth Unknown' checkbox is checked. The form includes fields for Title, Legal First Name, Middle Name (on ID), Legal Last Name, Gender, Date Of Birth, Known Traveler Number, DHS Redress No., Phone, and Email. The 'Date of Birth' field is a date picker, and the 'Date of Birth Unknown' checkbox is located next to it.

STANDARD TRAVEL

For Standard Travel, the **Date of Birth Unknown** check box is ON by default and is not available for change.

Use the "Date of Birth Unknown" Check Box

If the booker selects the **Date of Birth Unknown** check box, they will receive the following message:

This option should only be checked if you are LEGALLY unable to confirm the passenger's date of birth, most often due to government restrictions on data gathering for non-employees. If that is the case, please click OK to confirm your selection. If this is NOT the case, please click Cancel to provide the date of birth. Fictitious information is punishable by fines and penalties.

Please note that tickets won't be issued without this information and that reservations will be cancelled if the date of birth is not provided to the agency prior to ticketing deadline or 72 hours prior to check-in, whichever comes first.

The **Date of Birth Unknown** check box also includes a Help button that states: *If you cannot obtain the traveler's date of birth due to legal restrictions, check this box and Concur Travel will not add one to the reservation. Be aware that tickets won't be issued without this information and that reservations will be cancelled if the date of birth is not provided to the agency prior to the ticketing deadline or 72 hours prior to check-in, whichever comes first.*

Concur Travel will add an unassociated itinerary remark to the PNR. This will allow something to appear on the itinerary but also allow us to alert the agency that DOB is missing. The itinerary remark will be BIRTHDATE UNKNOWN.

REMARKS

BIRTHDATE UNKNOWN

If you close at this point your reservation may be cancelled. Note: Any part of the trip that is instant purchase or has deposit required will not be cancelled.

While reservation is permitted without a date of birth, ticketing is not. It will be incumbent upon the TMC to contact the traveler to get the DOB. This may lead to higher service fees depending on your contract with your TMC.

Write Middle Name for Guest Traveler

The **Write middle name to Itinerary** option must be enabled.

Professional and Standard Travel

For Professional Travel, the **Write middle name to Itinerary** setting is described in the configuration information in this guide.

For Standard Travel, the **Write middle name to Itinerary** setting is ON by default and is not available for change.

Important

Note the following:

- Sabre, Apollo, and Amadeus accept First name and Middle name all in the first name field.
- Galileo accepts the same but removes the space and truncates to one name.
- Worldspan ignores everything after a space in the first name so we will automatically add the first name and middle name together.

Make the Non-Profiled Traveler Reservation

The TSA items are only requested if the company travel configuration **When to send TSA required data to air carriers** field is set to *Only for traveler to, from, or transferring through the USA* or *Always* (described in the configuration information in this guide).

The screenshot shows a 'Guest Traveler' form. A red rectangular box highlights the following fields: Gender (a dropdown menu), Date of Birth (a date picker), Date of Birth Unknown (a checkbox with a help icon), Known Traveler Number (a text input with a help icon), and DHS Redress No. (a text input with a help icon). Other visible fields include Title, Legal First Name, Middle Name (on ID), No Middle Name (checkbox), Legal Last Name, Phone, Email, and Frequent Flyer Programs (For Delta).

Gender Inclusivity Profile Synchronization

Concur Travel Profile page supports two new gender options: Unspecified (X) and Undisclosed (U). Users can select from four different options in the Concur Travel Profile:-

- Male (M)
- Female (F)

- Unspecified (X)
- Undisclosed (U)

Inclusive Gender types Unspecified (X) and Undisclosed (U) syncs between a Concur profile and Sabre Profiles.

Inclusive Gender types Unspecified (X) and Undisclosed (U) will sync between a Concur profile and Apollo, Travelport+, and Worldspan GDS profile by using the new datapoint **Gender_Inclusive** with Concur Profile Templates. Gender types are not available to sync between the Concur profile and Amadeus profile. Any existing Profile templates using the **Gender** datapoint will need to be updated to use the new **Gender_Inclusive** datapoint in order to support all gender types. A lookup table is not needed for the new **Gender_Inclusive** datapoint.

Air Bookings

When an air booking is made in Concur Travel through one of the Global Distribution Systems (GDSs) and the **When to send TSA-required data to air carriers setting** is set to send TSA data, Concur Travel will now send gender types Unspecified (X) and Undisclosed (U) when sending TSA Secure Flight or Advanced Passenger Information (APIS) to the airline vendor.

For Sabre NDC bookings, some providers may respond with an error when Concur Travel sends an unsupported gender to them. In such cases, Concur Travel will not be able to proceed with the booking and will inform the user of the error with the following message: "We could not complete your booking because the specified gender is not accepted by the provider for the selected airline. Please select a different airline or contact your travel agency for assistance."

For EDIFACT bookings, all GDS systems will accept the Inclusive Gender types Unspecified (X) and Undisclosed (U) for TSA SSR messages without error, however, no validation is done with the airline being booked. If the airline booked in the PNR does not support Unspecified (X) or Undisclosed (U), the airline is required to reject the SSR message following the IATA Airline Industry Reservations Interline Message (AIRIMP) guidelines. Please refer to IATA for the most updated information regarding these rules and the format in which the airline should respond.

Hotel, Rail, and Car Bookings

Gender information is not sent to Hotel, Rail, and Car vendors.

Finishing Templates

Inclusive Gender types Unspecified (X) and Undisclosed (U) will be available for use in Finishing Templates with the new **Gender_Inclusive** datapoint. Any existing templates using the **Gender** datapoint will need to be updated to use the new **Gender_Inclusive** datapoint in order to support all gender types. A lookup table is not needed for the new **Gender_Inclusive** datapoint.

Update to the employee import format

For the Travel Addendum Import (Record Type 350) format, it supports the new Gender values as:

- M: Male
- F: Female
- X: Unspecified
- U: Undisclosed

Section 6: End-User Experience – Profiled Traveler

The screenshot shows the 'Primary Traveler' form. It includes fields for 'Legal First Name', 'Middle Name (on ID)', and 'Legal Last Name'. There is a checkbox for 'No Middle Name'. Below these are 'Gender' (a dropdown menu showing 'Female') and 'Date Of Birth' (a date picker). Further down are 'Known Traveler Number' and 'DHS Redress No.' with question mark icons. Below these are 'Phone' and 'Work Phone' fields, with a dropdown menu for '@concur.com'. At the bottom, there is a section for 'Frequent Flyer Programs' with a link 'Add a Program' and a dropdown menu for 'For American Airlines' showing 'No Program selected'.

Section 7: End-User Experience – Companions

If the company travel configuration is set to allow companions and if the **When to send TSA required data to air carriers** field is set to *Only for traveler to, from, or transferring through the USA* or *Always* (as described in the configuration information in this guide), then users see this page after a flight is selected.

Enter information about the companions that are traveling with you.

COMPANION 1

☒ Add companion manually
 ☐ Look up a company employee

First Name	Last Name		
<input type="text"/>	<input type="text"/>		
Email Address	Phone number and type		Work Phone <input type="text"/>
<input type="text"/>	<input type="text"/>		
Middle Name	<input type="checkbox"/> No Middle Name	Date of Birth <input type="text"/>	Gender <input type="text"/>
<input type="text"/>	mm/dd/yyyy		
Redress Number	Known Traveler Number		TSA Pre
<input type="text"/>	<input type="text"/>		
Vendor <input type="text"/>	Program Number <input type="text"/>		
Carrier <input type="text"/>	Advantage Program <input type="text"/>	Advantage Program Number <input type="text"/>	Expiration Date <input type="text"/>
Select a carrier			

Section 8: Direct Connects and Travelfusion

Concur Travel is passing TSA information to direct connect vendors that accept the formatting. Below is a status update per vendor.

- **Air Canada:** Air Canada provides a message for travelers to provide TSA information, although it is not supported during the booking process.
- **Southwest:** Supported
- **Travelfusion:** We do not pass TSA data to Travelfusion but if the vendor requires it, the user will be asked during the booking process on the carrier's **Flight Options** page.

Section 9: FAQs

Q. Why am I not getting frequent traveler credit?

A. It has been the government's policy that the name on the traveler's PNR match the name on their legal ID (passport or driver's license). It is also the government's policy that the legal name passed on to the TSA must be the same. Concur is required by the government to make sure that the legal name is the name that is in the PNR and the name that is in the SSRs that go to the TSA, for all travel into, out of, and over US airspace. It is the traveler's responsibility to make sure their name in Concur Travel matches their government issued ID.

Q. If a client is using Concur Travel & Expense and needs to add their middle name or initial, since it is on their government-issued ID, does that have to be sent

through the HR feed on the Expense side? Or what if the HR feed does not contain middle name or initial?

A. Travelers are able to update their Concur Travel profile without worry that their HR feed will overwrite it. This will only apply if you are using the standard Concur Travel HR feed. Travel-only customers using old HR feeds – there is already a setting in the HR feed that can make it so that the HR feed will not edit names, only insert them. Then travelers can edit their names (or administrators can edit them) to get them correct.

If the TSA settings are on, then middle name can be provided during the Concur Travel booking. There is no automated solution today if a customer uses Concur Travel & Expense with a third-party profile tool. Any corrections would have to be handled by a manual process.

Q. Can I add other trusted source numbers, such as Global Entry or NEXUS, to my profile?

A. You can add a different number to your TSA Known Traveler Field, such as a NEXUS or Global Entry Number (if the Known Traveler ID has been issued by the US Government), and it will be passed to the TMC. However, double-check that the number you are using in the Concur Travel profile matches your Supplier profile. If there is a mismatch, both can be rejected, and you may not get expedited security handling.

Q. Does Concur Travel include the issuing country code when sending an SSR message for Known Traveler and Redress Numbers?

A. For all GDS, Concur Travel includes the issuing country when sending TSA SSRs for Known Traveler and Redress numbers, per IATA guidelines. Concur Travel supports numbers issued by the US Government for travel to, from, connecting in and flying over the US. As such, the country code US is automatically appended to the TSA SSR for Known Traveler and Redress numbers.

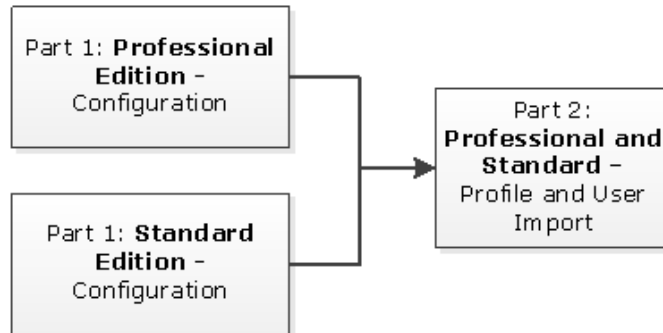
Q. Can I add additional Trusted Traveler numbers to my profile if I have multiple citizenships?

A. Concur Travel supports the entry of one Trusted Traveler Number and one Redress Number issued by the US Government.

Section 10: Configuration

Overview

Follow the appropriate steps for your edition of Travel:



- Part 1: Professional Edition – Configuration in Concur Travel
– **or** –
Part 1: Standard Edition – Configuration in Concur Travel
- Part 2: Professional and Standard Editions – Profile and User Import

Part 1: Professional Edition – Configuration in Concur Travel

► **To enable:**

1. Click **Administration** > **Travel** (on the sub-menu) > **Travel System Admin** and access the desired client travel configuration.

NOTE: Depending on your permissions, the page may appear immediately after you click **Administration** or **Travel**.

2. Locate the **Transportation Security Administration (TSA) Secure Flight Options** section of the travel configuration page

Transportation Security Administration (TSA) Secure Flight Options

For information required by the TSA for travel to, from, connecting in and flying over the USA:

Show and require on profile; prompt if missing and automatically save ▼

When to send TSA-required data to air carriers

Always ▼

☐ Allow guest bookings when the Date of Birth is unknown

☐ Write middle name to Itinerary

3. Make the desired selections.

Field	Description / Action
For information required by the TSA for travel to, from, connecting in and flying over the USA	<p>Select one of these:</p> <ul style="list-style-type: none">• Don't show applicable fields on profile, prompt for information when needed, but don't save it <p>NOTE: The traveler will be prompted only in the Travel Wizard for this option if the corresponding TSA field is not set to <i>Never</i>.</p> <ul style="list-style-type: none">• Show applicable fields on profile, but don't require; prompt if missing and give options to save• Show applicable fields on profile, but don't require; prompt and require if missing, and give the option to save <p>NOTE: Since this feature is driven by the fact that bookings will fail without it, this feature is not compatible with the feature to allow guest bookings to proceed without filling in the information</p> <ul style="list-style-type: none">• Show and require on profile; prompt if missing and automatically save
When to send TSA-required data to air carriers	<p>Select one of these:</p> <ul style="list-style-type: none">• Never• Only for traveler to, from, or transferring through the USA• Always <p>NOTE: In order for the traveler to be asked for data when making a reservation, the When to send TSA required data to air carriers field must be set to <i>Only for traveler to, from, or transferring through the USA</i> or <i>Always</i>.</p>
Allow guest bookings when the Date of Birth is unknown	Select to enable.
Write middle name to Itinerary check	Select to enable.

Part 1: Standard Edition – Configuration in Concur Travel

► To enable:

1. Click **Administration > Travel Settings**.
2. In the Travel Setup Wizard, click the **Agency Setup** setup step.
3. Scroll to the **Transportation Security Administration (TSA) Secure Flight Options** section.

AGENCY SETTINGS

This step allows your fulfillment travel agency to configure items specific to their operational process.

1 Travel Policy

2 Travel Rules

3 Configurable Messaging

4 Custom Text

5 Organization Units

6 Policy Violation Codes

7 Company Locations

8 Form of Payment

9 Discounts and Travel Content

10 Custom Trip Fields

11 Custom Profile Fields

12 Unused Tickets

13 Site Customization

14 Manage Users

15 Invite Users

16 Agency Settings

Number of days to hold trip:

No limit

Transportation Security Administration (TSA) Secure Flight Options

For information required by the TSA for travel to, from, connecting in and flying over the USA:

Show applicable fields on profile, but don't require; prompt and require if missing, and give the option to save

When to send TSA-required data to air carriers

Only for travel to, from, connecting in and flying over the USA

Agency Invoice

☐ Use agency invoice for GDS Air

4. Make the desired selections.

Field	Description / Action
For information required by the TSA for travel to, from, connecting in and flying over the USA	<p>Select one of these:</p> <ul style="list-style-type: none"> Don't show applicable fields on profile, prompt for information when needed, but don't save it <p>NOTE: The traveler will be prompted only in the Travel Wizard for this option if the corresponding TSA field is not set to <i>Never</i>.</p> <ul style="list-style-type: none"> Show applicable fields on profile, but don't require; prompt if missing and give options to save Show applicable fields on profile, but don't require; prompt and require if missing, and give the option to save <p>NOTE: Since this feature is driven by the fact that bookings will fail without it, this feature is not compatible with the feature to allow guest bookings to proceed without filling in the information</p> <ul style="list-style-type: none"> Show and require on profile; prompt if missing and automatically save
When to send TSA-required data to air carriers	<p>Select one of these:</p> <ul style="list-style-type: none"> Never Only for traveler to, from, or transferring through the USA Always <p>NOTE: In order for the traveler to be asked for data when making a reservation, the When to send TSA required data to air carriers field must be set to <i>Only for traveler to, from, or transferring through the USA</i> or <i>Always</i>.</p>

Other Settings

For Standard Edition, these options are set and are not available for change:

- **Allow guest bookings when the Date of Birth is unknown** is set to ON; the **Date of Birth Unknown** check box appears automatically.
- **Write middle name to Itinerary** is set to ON.

Part 2: Professional and Standard Editions – Profile and User Import

Travel Profile API 2.0 Fields

The following field tags are available in Travel Profile API 2.0 in the TSA Info section:

- DHS Redress
- No Middle Name
- Gender
- Birthdate

Profile Template Values

The profile template values that match the TSA profile fields are:

- **DHS Redress No.:** DHS_REDRESS_NUM
- **Middle Name:** MIDDLE_NAME
- **Gender:** GENDER
- **Date of Birth:** BIRTHDATE

Imports

PROFESSIONAL TRAVEL

All fields are available using:

- **Integrated Travel/Expense:** The scheduled (overnight) import (see *HR Data Feed* below)
- **For Travel-only: Travel System Admin > Import Data**

STANDARD TRAVEL

All fields are available using **Manage Users > Administer Users**.

HR Data Feed

Concur Travel-only customers utilizing an HR data feed must request that their HR data file be modified to accommodate for TSA requirements **only** if the customer is able to pass along this data from a centralized point.

For Concur Travel and Expense customers, the HR data feed files have been modified to accommodate the TSA Requirements. The Employee Import 300 record type has always contained the Middle Name value and has been used upon request. The 350 type now contains Date of Birth and Gender.

To accommodate clients who cannot update their HR system with the legal name, a new host database entity setting was introduced that will indicate if employee name fields are updated via an employee import feed. The default value for this setting is Y (Yes), meaning the fields **will** be updated (this is the current default). Clients wanting to **prevent** update of these fields must submit a Client Support case to have this setting set to N (No). A setting of N means these employee fields will not be updated.

Concur Travel and Expense Employee Import (HR Feed) also requires coordination with Concur support to prevent Concur Travel name fields from being overwritten by the data sent in the CTE Employee Import. Please create a case in Concur Client Central to ensure this step is completed

The Expense HR load will create users and populate their name fields. The user then can go into their Concur Travel profile and update the name fields if needed. A subsequent CES HR load will not update the name fields anymore, but preserve what the user entered.

