# Town Hall: Conferma for Travelers

Statewide Travel Program

**Statewide TRAVEL PROGRAM**
CA DEPARTMENT OF GENERAL SERVICES

# Content

# 1. Conferma App

## 1.1 General Information

**What if you do not have a personal credit card to provide the hotel for incidentals?**

Hotels will also accept a debit card for incidentals. While a debit card will work to secure a reservation or for an incidental hold, it is not recommended because the hotel places a hold on the cardholder's bank account for either the full amount of the stay, or the full amount of the incidentals; thereby limiting/freezing the funds available in the cardholder's account.

To pay for the entire stay instead of using the virtual card, you can request a travel advance from your accounting office. Please reach out to your agency Travel Coordinators for more information.

**What is the link to the CI Azumano page?**

The link to the CI Azumano website is https://caltravel.ciazumano.com/.

**Can you provide the path to the Conferma instructions on the Statewide Travel Program website?**

Here is the link for our Virtual Payment and Virtual Card Number Resource page.

**Is this training intended for people who have already been trained on Conferma?**

This training is for travelers who use Conferma and would like more information on the use of Conferma virtual payments. Training will cover the Conferma app, troubleshooting, if/then scenarios, and more.

**Do only Travel Coordinators need to use this app, or is this for all travelers?**

This app can be used by travelers when using the agency's virtual card to pay for a hotel. Agency Travel Coordinators will have access to Conferma/SNAP, which provides access to all the virtual card reservations for their agency.

**Is Conferma replacing Concur?**

The Conferma app works in tandem with Concur. You will still book your hotel reservation through Concur. Conferma is the source of the virtual payment which will allow for direct billing of the hotel charges.

**Do we ever have hotels pre-paid?**

State agencies are prohibited by statute from pre-paying for goods or services; therefore, pre-pay rates cannot be booked through Concur. For more details, refer to SAM section 4117.3. This applies to executive branch agencies only.

**Is this something being implemented for all agencies and becoming mandatory for travelers?**

Yes, the VCN program is being implemented for all agencies, and it is up to each agency to decide whether to make this payment method mandatory or optional.

**What is the website the presenter keeps referring to?**

Conferma or Concur. Conferma is the app used to manage virtual cards. Concur is the app/website used to book business travel arrangements.

# 1.2  Create a Conferma Account

**Do you have to register on a browser first?**

Yes, you'll need to register for the Conferma app first. You can do this through a web browser or directly in the app. Be sure to use the same email address that you use to log into Concur.

**If we're already registered with Conferma, should we simply download and log into the mobile app, and will trips booked before registering still appear in the app, or do they need to be added manually?**

Yes, if you've already registered with the Conferma app via their website, you can simply log into the mobile app. Trips booked before registering will not appear in the app; only trips booked afterward will be visible in the app.

**Can we create a Conferma account using either the website or app to register?**

Correct, as long as you are using the same email that you use to log into Concur. Make sure to use the correct website when registering online: https://app.conferma.com/

**Does profile information get transferred if the traveler changes their phone number, agency, or position?**

No. If app users need to update their phone number, they must contact Conferma support at appusers@conferma.com to request the update.

If the traveler is changing agencies, they will need to create a new profile entirely, since they will no longer have access to their old Concur account from the previous agency.

# 1.3 Download the Conferma App

**Can you have the app on more than one device or phone?**

Yes.

**How does one download Conferma app?**

If using your work issued phone, you may need to work with your agency's IT department to get authorization. If on your personal phone, you can go through the iOS and Android app store available on your phone. Please see the Conferma App Guide for more information.

Your agency Travel Coordinator(s) can assist with any questions you may have.

**For new travelers, does Conferma send them an email with instructions for the app?**

No, your agency Travel Coordinator(s) should provide you with this information. Please see Virtual Payment and Virtual Card Number Resources for additional resources.

**Can one download the Conferma app on their work phone and personal phone? Is the information consolidated?**

Yes, you can download the app on more than one device. Just make sure you're logging into the same account on all devices. Do not create a new login.

**Will the District reconsider allowing the Conferma app to be installed on District tablets?**

Please reach out to your agency IT or agency Travel Coordinator(s) to request the installation.

**Does downloading the Conferma app to a personal device make that device subject to a PRA request?**

The Conferma app is optional. You do not need the app to use the virtual card payment method. It will help support the hotel check-in process, in case you encounter an issue and it is after hours and/or you can't get in touch with your agency's Travel Coordinator(s). Contact your agency's Travel Coordinator(s) to find out if downloading a business travel app to a personal device is subject to a PRA request.

**What if employees don't have State provided work cell phones? Is the expectation they use their personal phone?**

No, the app is not a requirement to use Conferma virtual payments, it is just support for hotel check-in, in case you encounter an issue and it is after hours and/or you can't get in touch with your agency's Travel Coordinator(s).

**For employees who either:**

- **Do not wish to download the app on their personal phone**

- **Have a phone that does not support the app**

**What support or alternative will be provided?**

The app can be used on either a state-issued phone or a personal phone. If you are unable to download it to a state-issued phone, we encourage you to reach out to your agency's IT department.

The app is not a requirement to use Conferma virtual payments, it is just support for hotel check-in, in case you encounter an issue and it is after hours and/or you can't get in touch with your agency's Travel Coordinators.

# 1.4  Managing Travel for Others

**Will I be able to see the trips for employees which I am a Travel Arranger/Assistant?**

No, the Conferma app is for managing your own hotel reservations and is not available to use for managing travel for others.

**If one employee booked rooms for several staff members through Concur, how can we apply the virtual card to those reservations?**

Please reach out to your agency's Travel Coordinator(s) and let them know you would like to have access to the virtual payments.

**Is there a way the Travel Coordinator(s) can have access to the virtual cards?**

Yes, agency Travel Coordinators have an agency Conferma SNAP account, which allows them to access the virtual card information for their agency travelers.

**We have non-state employees who travels on behalf of our agency, how do we ensure they do not have trouble using this app? These travelers will not have Concur accounts as they travel as guests,**

**serving as subject matter experts. What is the best way for me (booking their travel) to handle their travel arrangements?**

We recommend creating a Concur profile for all travelers, regardless of how often they travel. This mitigates risk, reduces fraud, and aids in cost reconciliation. Please see the video How to Book for a Guest starting at 1:52 minutes, for step-by-step instructions on how to create a profile for a non-employee.

Please reach out to your agency Travel Coordinator(s) for guidance on adding a virtual card to a guest booking.

## 1.5  Receipts

**Are the receipts stored in the app?**

Yes, once the traveler uploads the receipt in the mobile app, it is stored in the Conferma account. The traveler and agency Travel Coordinator(s) will have access to the receipts.

Receipts can be uploaded by the hotel, traveler, and agency Travel Coordinator(s). Please see slide 11 on the Town Hall: Conferma for Travelers PowerPoint for more information.

**Can the receipts be shared with other employees or our payment system?**

Yes, agency Travel Coordinator(s) have Conferma SNAP access, which allows them behind-the-scenes access to the virtual cards for their agency travelers. This allows them to assist with troubleshooting and reconciliation.

**What is the advantage of uploading a receipt?**

The purpose of uploading the receipt is to allow your accounting department to reconcile payments. In order to use virtual payments, you must provide a receipt to your accounting office, whether it is uploading the receipt via the Conferma mobile app or emailing the receipt to your accounting department directly.

**Does taking a photo of a receipt within the Conferma app mean that we no longer upload the receipt in CalATERS when filling out a Travel Expense Claim?**

If your agency uses CalATERS for travel reimbursements, you must still include the hotel receipt with your Travel Expense Claim (TEC) submission. The receipt is also required by your accounting office to reconcile hotel charges against the virtual card account. Providing the receipt upfront helps avoid repeated follow-ups with the hotel and prevents potential delinquencies that could affect future use of the virtual card.

**Can Conferma send reminders after each trip to travelers to upload the receipts to the app?**

Conferma sends a reminder to the hotel every day for 14 days to upload the receipt. We always recommend that travelers check out in person to request the receipt then. Additionally, travelers should be required (via your agency's travel policy) to provide a receipt upon trip completion.

# 1.6  Managing the Virtual Card

**Why does my cancelled reservation still show up on my virtual credit card? When will it be deleted?**

All past hotel reservations will remain in the app for your record purpose.

**I have travel arrangements that were made prior to today. How can I go about getting the reservation added to Conferma?**

Please reach out to your agency Travel Coordinator(s) to assist.

**What does this mean? "Hotel Communication>view message history.>Failed to Deliver-We failed to send an authorized fax to xxxx. Attempted on xxxxxx."**

Conferma has indicated that their attempt to fax the virtual card details to the hotel failed, and they provided the fac number and the date of the attempt.

You can provide this information to the hotel, and they can give you alternate contact information to send the payment information to. Please see slide 10 of the Town Hall: Conferma for Travelers PowerPoint for detailed information. Please notify your agency Travel Coordinator(s) of any hotels where you encounter this. They will notify us, and we can reach out to the hotel to make sure that they update the correct communication method in Conferma's database.

**What does "failed fax" mean to me at check in to the hotel?**

It means the fax of virtual payment information did not go through to the hotel. You may need to go into the app and edit the hotel's contact information, as shown on slide 10.

**What number do we call during regular business hours?**

You will need to contact your agency Travel Coordinator(s) for assistance during regular business hours.

**My account shows the virtual card is expired. How can I resolve that?**

Each virtual card is unique and date-specific to the hotel stay it was deployed for. All virtual cards expire 5 days after the check-out date. A new virtual card is deployed for each hotel stay booked.

**How do I get the entire virtual card number and CVV 24 hours prior to the travel date?**

You will need to contact your agency's travel coordinator unit, who should have access to the backend system to retrieve the virtual card number and CVV prior to your travel date.

**What is the MCC Code?**

MCC stands for Merchant Category Code. It's a four-digit number used by credit card companies to classify businesses by the type of goods or services they provide.

In the context of virtual cards for travel:

- Hotels have a specific MCC that allows the virtual card to be charged.

- If an employee tries to use the card at a business with a different MCC (e.g., a restaurant or retail store), the transaction may be declined.

- This restriction is intentional—it helps prevent misuse or fraud by ensuring the card is only used for its intended purpose

**Is hotel parking and incidental fees included with the VCN amount?**

Parking is included. The virtual card will pay for the hotel room, taxes, resort fees, and hotel parking.

Incidentals must be paid with a personal card and provided to the hotel upon check-in. Please contact your agency Travel Coordinator(s) for reimbursement policies.

# 1.7  Troubleshooting the Conferma App

**Is Conferma's customer service available Monday-Friday, regular business hours? Or 24 hours?**

The Service Desk operates 24/7. When customers send an email to **appusers@conferma.com**, a ServiceNow ticket is automatically created and routed to the Service Desk queue. Each shift has a dedicated agent responsible for triaging and assigning new tickets.

**What is the turn-around time to receive a response?**

The user will receive an acknowledgement from the support desk within 8 hours.  The resolution will depend on the severity of the issue and how much information the end user provided in their email.  If they provide all the required information upfront, then resolution should be quick.  However, if the team must go back to the user to get information, then that will extend the time to resolution.

**Who do we contact if we have issues resetting the password or unlocking the app account?**

If you have a password or account issue, the Conferma mobile app has a "Forgotten Password" link that can help you reset your password. If that does not work, you can contact Conferma at AppUsers@conferma.com.

**I recently switched phone numbers so I am currently unable to log into the Conferma app because the verification code is going to my old number. Who do I contact to update my phone number so that I can log into my Conferma account?**

Please go through the "Forgotten Password" process, which will allow you to reset your two-factor authentication. If you are not successful, please reach out to AppUsers@conferma.com.

# 2. Hotel Issues with the Virtual Card

**If the hotel is labeled Preferred or Most Preferred but still doesn't accept the virtual card and/or requires a separate credit card authorization form when checking in, do we report it to Statewide Travel Program?**

Yes, we ask that you provide us with this feedback so we can update Concur to reflect the correct information. This will prevent future issues for your travelers and other state travelers.

**If the hotel charged an extra night and the virtual card expired because it's been more than 5 days, how can the hotel refund the charge?**

The card is only active for 5 days after check-out, however, the card will still accept refunds for up to 1 year.

**If hotels run the card more than once, will it decline?**

The card should not decline due to the number of times it has been run. However, the card will decline if the hotel attempts to charge more than the credit limit. If that occurs, please provide your agency Travel Coordinator(s) with the itinerary and property information so they can reach out to U.S. Bank to identify and resolve the declines.

**What if the hotel does not accept the virtual card and I have to pay with my personal credit card?**

Please email your agency Travel Coordinators with information about these properties. They will gather the hotels that you are having issues with and send them to us so we can reach out and work with the property to accept the virtual payments correctly.

It is also important to check any notes in the hotel listing in Concur. If we have contacted hotels who do not want to accept the virtual cards, we will put a notation in the hotel listing letting you know that the property has opted not to accept the virtual card, and that another form of payment will be needed.

We encourage travelers to seek out properties that are listed as "Preferred" or "Most Preferred." These properties have contractual agreements with the state of California where they are required to accept the virtual card.

# 3. Hotel Check In

**When the hotel needs their own authorization, how do you complete that using Conferma? Can the hotel send it to us to complete?**

The Conferma app provides the full virtual card number, billing address, acceptable charges, and reservation information that travelers need to have to complete the hotel's own credit card authorization form. The hotel can email their own credit card authorization form to the traveler, however, please report these situations to us so we can work with the hotel to only require the Conferma authorization form.

**I have only been asked to provide a personal card for incidentals. What are we supposed to be doing?**

It is an industry standard and requirement to provide a personal card upon check-in for incidentals. Please see slide 21 on the Town Hall: Conferma for Travelers PowerPoint for more information.

**Are we still using our personal credit cards for hotels with Conferma or is Conferma going to work on a system where the state pays?**

If your agency participates in the Conferma virtual card program, the virtual card will be used to pay for the room, tax, resort fees and parking. A personal card will still be required for incidentals at check-in. The Conferma app allows travelers to manage their virtual card hotel reservations. If your agency does not participate in Conferma yet, a personal card is required for the room, tax, resort fees, incidentals and parking.

**Can the card provided on the app be shown to the hotel for parking charges?**

Yes, you can show the virtual card number to the hotel as it will allow parking charges.

**Can the Conferma virtual card be used for incidentals when checking into a hotel?**

It is an industry standard to provide a card for incidentals. A personal card must be provided for incidentals. The virtual card can only pay for the hotel room, taxes, resort fees, and parking. Please see slide 21 on the Town Hall: Conferma for Travelers PowerPoint for more information.

**Do we always have the option to use a personal credit card and seek reimbursement rather than using the VCN for a hotel?**

Please contact your agency Travel Coordinator(s) about internal virtual card policies, payment and reimbursement.

# 4. Hotel Check Out

**At checkout, the hotel is required to provide an itemized folio to the employee/guest, correct?**

At check-out, hotels are generally required to provide an itemized folio or receipt) to the employee or guest. If a hotel does not provide a folio or receipt at check-out, please contact your agency Travel Coordinator(s) so they can reach out to the Statewide Travel Program. Make sure to provide your agency Travel Coordinator(s) with a copy of your itinerary and a detailed explanation of the issue.

**What if the hotel refuses to provide the folio (receipt) at checkout?**

This scenario may occur because the initial Conferma credit card authorization form is sent to the hotel directly from the state's contracted travel agency. Some hotel staff will not relinquish the hotel folio to the traveler because they were not the paying party, regardless of the traveler's name being on the folio. In the unusual circumstances the hotel front desk refuses to provide a virtual card folio, please try the options below:

1. Attempt to educate the front desk staff. The hotel may indicate that the travel agency is a third party. Explain to them that the travel agency is the sole contracted travel agency for the state of California, and the reservation was made on your behalf and is being paid for by your employer.

2. Speak to a front desk supervisor. Explain the above and inform the supervisor that the folio is required by your agency to reconcile the payment.

3. Leave the hotel and contact the hotel's accounting office to request the folio.

4. If you are a rewards member with the hotel, typically you will receive an email with the folio. Additionally, if you have the respective hotel's mobile app, you will be able to access the folio directly and email it to yourself or your accounting office.

5. As a last resort, contact your agency Travel Coordinator(s) for support.

# 5. Additional Resources

## 5.1 CI Azumano

Website: www.caltravel.ciazumano.com

Email: CalTravel@ciazumano.com

Phone: 1 (877) 454-8785

## 5.2 Concur

Concur Login Page

## 5.3 Conferma

Conferma Login Page

## 5.4 Statewide Travel Program

As a traveler, your first point of contact is your agency Travel Coordinator(s).

Website: www.dgs.ca.gov/OFAM/Travel

- Concur Travel Demonstration Training (Video)
- Conferma App Guide
- Conferma Quick Guide for Travelers
- How to Set up 2FA
- How to Set Up 2FA (Video)
- Lodging Resources
- SAM 4117.3 (Applies to executive branch agencies only)
- State Traveler 101
- Town Hall: Conferma for Travelers PowerPoint
- Trainings Resource Page
- Travel Updates Subscription
- Traveler Resources on STP Website (Video)
- Virtual Card Number (VCN) Training Tutorial Video
- Virtual Payment and Virtual Card Number Resources Page