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Student Travelers

Creating a Student Travel Request

If you are arranging travel for a student, email apinvoice@sonoma.edu with the student name, address, SSU ID, SSU email, and phone number. For faster reimbursement via direct deposit, the student can download and submit a [Direct Deposit Authorization](#) form through AP secure upload.

To Accounts Payable ap invoice <apinvoice@sonoma.edu>

Concur Non-Employee Student Travel - (Insert Student Name)

Hello,

I will be arranging travel for a student in Concur. Please let me know when they are added as a supplier so I may start the travel request. Here is their information:
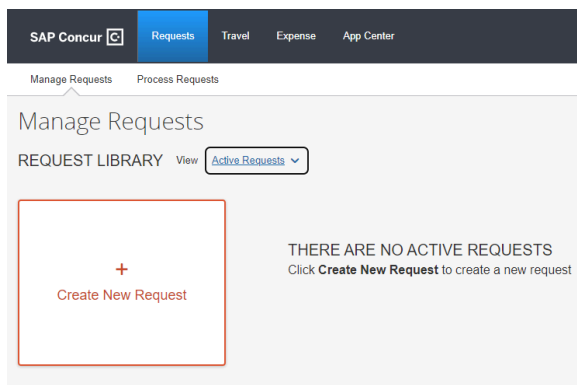
Sally Seawolf
1701 E. Cotati Ave
Rohnert Park, CA 94928

SSU ID # 123456789
sally.seawolf@sonoma.edu
707-123-4567

Thank you.

Once you receive an email confirming the student was added, log into SAP Concur.

To create a request:

1. Click **Requests** on the header toolbar, and then select the **Create New Request** tile on the request page.

2. Complete all required fields with a red asterisk:
   a. Click the dropdown for Request Policy and select "CSU-Non-Employee Request Policy".

   Create New Request

   Request Policy *
   *CSU-Non-Employee Request Policy   ⌄

   *CSU-Non-Employee Request Policy

   *CSU-Request Policy

   Traveler Type *
   None Selected   ⌄

   Non-Employee Name *
   ▼ ⌄ | Search by Text

   Travel Start Date *
   MM/DD/YYYY   📅

   Trip Purpose *
   None Selected   ⌄

   b. Enter the student's name into the Non-Employee Name section.
   c. Select "Student" as the Traveler Type from the drop down selection.

   Create New Request

   Request Policy *
   *CSU-Non-Employee Request Policy   ⌄

   Trip Type *
   None Selected   ⌄

   Traveler Type *
   None Selected   ⌄

   None Selected

   Non-Employee

   Student

   None Selected   ⌄

   d. Continue to fill out pertinent request information as you would for a standard request.
3. Select Create in the lower right-hand corner of the screen.

After the request is submitted, approved, and the travel has occurred, create an expense report from the request and process as normal.

Non-Employee Guest Travelers

Creating a Non-Vendor Guest Travel Request (Such as Candidate)

Before creating a travel expense, the guest traveler must complete a 204 Vendor Data Record Form in order for AP to create a Supplier ID. The 204 Form can be found on the [Accounts Payable Forms & Policies page](#). **A W9 cannot be accepted in place of the 204.**

Please note: Due to level one data on the form, the completed the 204 must never be emailed. The traveler must upload the form to the [Secure Upload Page](#).

For non-US residents, before travel can occur, the AP office must review their Foreign National Data Collection Form and W-8BEN in addition to the 204. The Supplier ID must be created before any travel expense can be submitted.

Department monitors CFS for supplier creation. Once the guest has been added as a supplier, email apinvoice@sonoma.edu the supplier name, and request Concur access. Once AP replies, log into SAP Concur to begin an Expense Report. Please note: **No request is needed for guest travelers.**

To create a report:

1. Click **Expense** on the header toolbar, and then select the **Create New Report** tile on the request page.
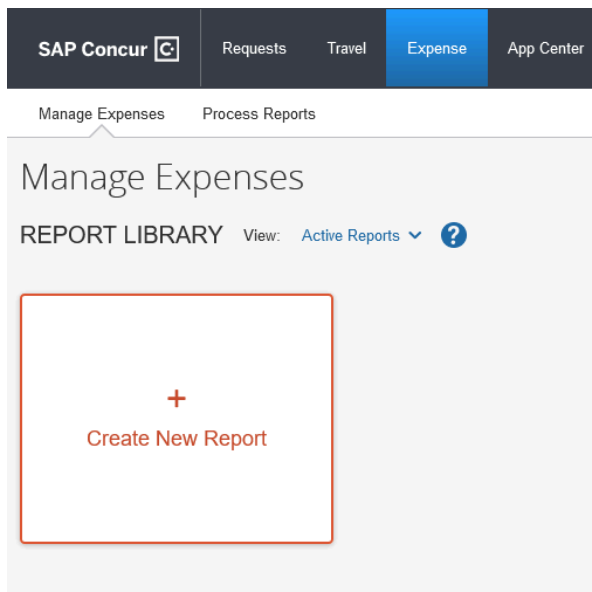
2. Complete all required fields with a red asterisk:
   a. Click the dropdown for Request Policy and select "CSU-Non-Employee Request Policy".

Create New Report

Create From an Approved Request

Policy *
[*CSU-Expense Policy ▼]

    *CSU-Expense Policy

    *CSU-Non-Employee Expense Policy

Report/Trip Name *
[   ]

Travel End Date *
[MM/DD/YYYY 📅]

Trip Purpose *
[None Selected ▼]

Personal Dates of Travel-If none enter NA *
[   ]

b. Select the business unit as (SOCMP) SOCMP - Sonoma State University, then you can select the guest from the Non-Employee Name drop down.

Create New Report

Create From an Approved Request

       * Required field

Policy *
[*CSU-Non-Employee Expense Policy ▼]

Business Unit for Supplier *   ②
[▼ ∨ (SOCMP) SOCMP - Sonoma State]

Non-Employee Name *   ③
[▼ ∨ Search by Text]
    (SOCMP-0000011111) DOE, JOHN, DUMMY@SONOMA.EDU

Report/Trip Name *
[   ]

Trip Type *
[None Selected ▼]

Traveler Type *
[None Selected ▼]

c. Select "Non-Employee" from the Traveler Type drop down menu.

Create New Report

Create From an Approved Request

       * Required field

Policy *
[*CSU-Non-Employee Expense Policy ▼]

Business Unit for Supplier *   ②
[▼ ∨ (SOCMP) SOCMP - Sonoma State]

Non-Employee Name *   ③
[▼ ∨ (SOCMP-0000011111) DOE, JOHN, DUMMY@SONOMA.EDU]

Report/Trip Name *
[   ]

Trip Type *
[None Selected ▼]

Traveler Type *
[None Selected ▼]
    None Selected
    Non-Employee
    Student

Trip Purpose *
[None Selected ▼]

Travel Start Date *
[MM/DD/YYYY 📅]

Destination City/State

Personal Dates of Travel-If none enter NA *

d. Continue to fill out pertinent request information as you would for a standard request.

3. Select Create in the lower right-hand corner of the screen.

When the Expense Report is created, you can go in and add/itemize expenses as you would for a standard expense report.