



Concur Guide for Non-Foreign, Non-Employee Travel

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This guide applies to the following types of non-employee travel:

- 1) Employee Recruitment/Interview Candidates
- 2) A person traveling to do work on behalf of the university/non-Concur profiled users
- 3) Students traveling to conferences or other events

****Note: If a student is traveling with an employee and the student will not be reimbursed for any travel expenses meaning that the employee is paying for everything, the students travel expenses will be included in the employee's expense report and be processed as a group travel trip.**

A profiled Concur user (CSUMB employee) will prepare and submit requests and expense reports on behalf of the non-employee/student within the Concur system.

*Only department support staff or managers should be processing non-employee travel through Concur.

Non-Employee travel adheres to the CSU Travel Policy & Procedures. For more details, please refer to the Policies section on the Concur Travel webpage.

TRAVEL REQUEST

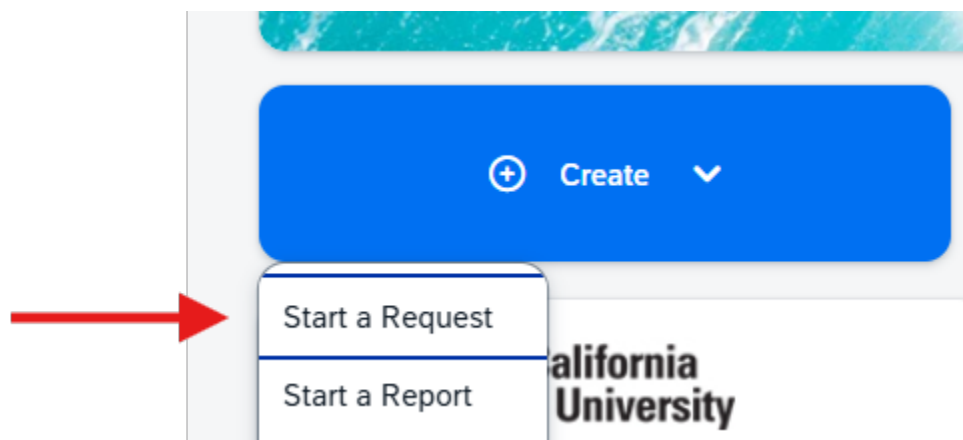
Creating a Travel Request

Step 1:

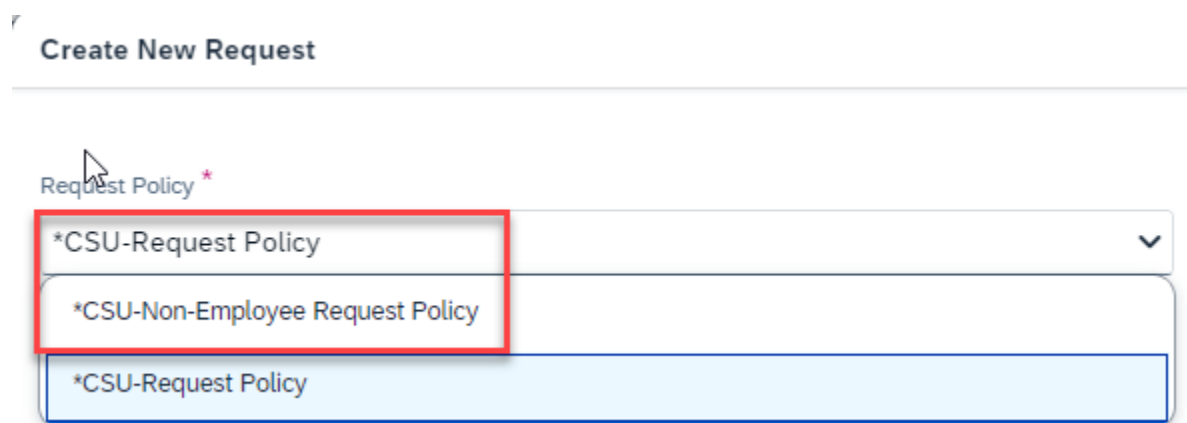
The non-employee/student will need to have a CFS supplier ID on file. If needed, fill out the [Non Employee Travel Concur Profile Request](#) located in the Accounts Payable section of the CSUMB website so a supplier file can be created. A supplier ID is required for all payment situations (University direct-billed or reimbursement). Any questions regarding the supplier ID should be directed to travel@csumb.edu.

Step 2: Once the above step is completed, log into Concur to start a Request.

⇒ Click on **+ Create** and select **Start a Request**.



⇒ Change the Request Policy to ***CSU Non-Employee Request Policy**.



⇒ Under the **Non-Employee Name field**, choose 'Code' or 'Either' in the dropdown and type "MB". The list of available students whose CFS set-up is complete will appear and you can make your selection. Make sure that person is associated with the Monterey Bay campus. If you are not able to find the supplier ID in Concur, it means the student is not set up in the system yet (refer to step 1).

Non-Employee Name *

Either

MB

Q

(MB001-0000004539) (MB) Addison Ryne ARYNE@CSUMB.EDU

(MB001-0000004366) (MB) Annika Altman AALTMAN@CSUMB.EDU

⇒ Under **Request/Trip Name**: Enter the individual's last name, first name and the event name. See example below. If the traveler will be attending the same event on different dates, then add the date to the request name for identification purposes. Please be aware there is a limited number of characters for this field, so do your best to enter information that will identify the traveler and trip information.

Request/Trip Name * ?

Adams, Jena ABS Conf 10/15-10/18

Continue filling out Request Header information with Trip Type, Travel Start/End dates, Traveler Type, etc.

Create New Request

Request Policy *	Non-Employee Name *	Request/Trip Name *
*CSU Non-Employee Request Policy	(MB001-0000004011) (MB) SOFIA CAMPOS SOCAMPOS@CSUM... X	ABC Conference - Campos, Sofia
Trip Type *	Travel Start Date *	Travel End Date *
1-In-State X	03/31/2025	04/01/2025
Traveler Type *	Trip Purpose *	Personal Dates of Travel if none enter NA *
Non-Employee X	Conference X	NA
Destination City/State *	Final Destination Country *	Are they traveling to a banned state? *
Sacramento, California X	UNITED STATES (US) X	No X
If student, did they travel w/Employee? *		
No X		
Business Unit *	Fund *	Department *
(MB000) MB000 - Cal State Univ - Monterey Bay X	(MB500) MB500 - CSU Operating Fund X	(1006) 1006 - Accounting Department X
Program	Class	Project

⇒ Make sure to enter the correct Chart Field information for the appropriate funding source.

***Note, the chart string will default to the Department chart string information. Change only if you need to.**

⇒ Once the Request header information is populated, click ‘**Create Request**’.

⇒ Enter the estimated Request amount by adding the expected expenses. Click Add, enter an estimated amount for any expenses the traveler is going to have...Airfare, Hotel/Lodging, Car Rental, Ground Transportation, Per Diem, etc. and save after each expense is created.

***Note- The total estimated request amount must not exceed the max allowable funding limit.**

EXPECTED EXPENSES

Add

Edit

Delete

Allocate

☐ Alerts↓↑ Expense type↓↑

Add expected expenses and/or travel plans

01. Travel Expenses

Hotel Reservation

Incidentals

02. Personal Car Mileage

03. Transportation

Air Ticket

Car Rental

Ground Transportation

Parking/Tolls

Railway Ticket

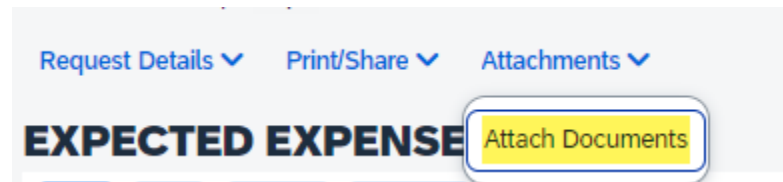
04a. Meal & Incidentals Per Diem

04b. Meals - Domestic (Travel prior to 1-1-24)

09. Other

Liability/Unfunded Only

⇒ Attach any documentation needed (trip justification documentation, an agenda for a conference, meeting, or interview, etc.) under the **Attachments > Attach Documents** link.



⇒ Once you have completed filling out the request information, click on **Submit Request**. An automated email notification will be sent to you once the request is approved. *Please note: the non-employee traveler will not receive any Concur email notifications.*

Booking Travel

Once the request is approved, the employee may start booking trips for the non-employees, if needed.

- **A non-employee will be responsible for covering the cost of their travel arrangements if they choose to add personal days of travel along with business days.**

- o The following items will be required for reimbursement:

- Cost comparison if personal days are indicated
 - Itemized receipts & proof of payment for all transactions

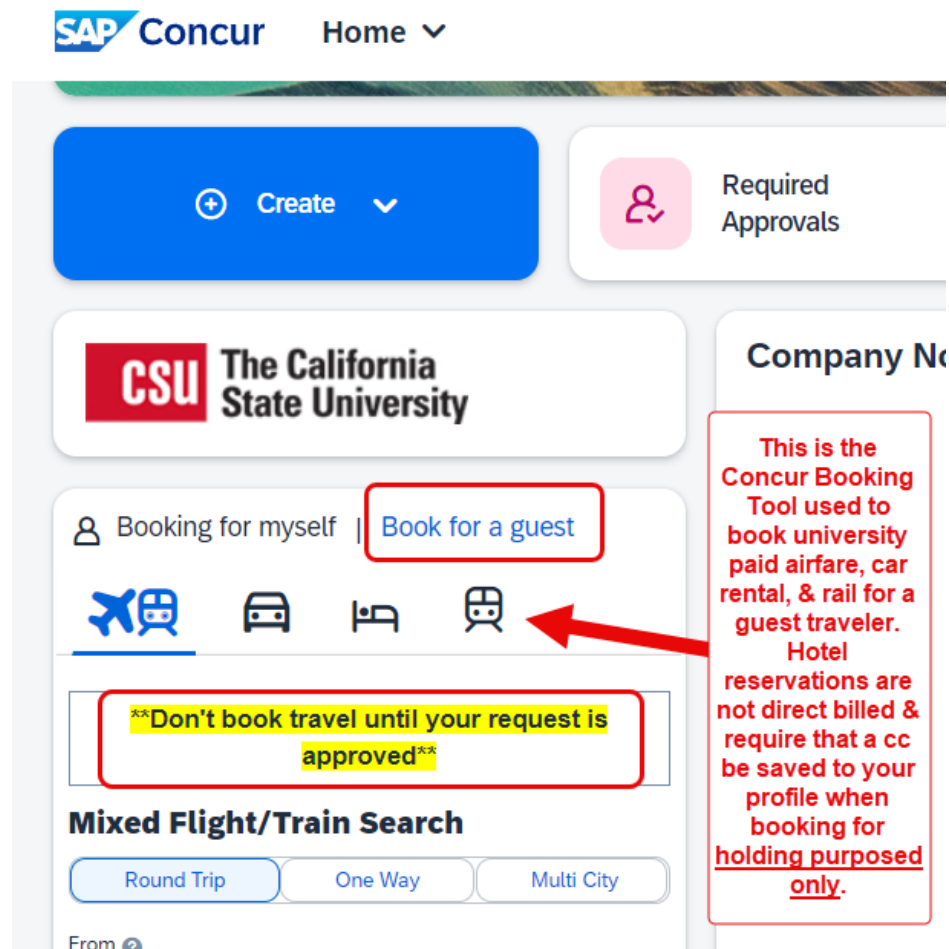
- **Employees (faculty or staff) are not allowed to pay for non-employee travel unless authorized to do so by Travel. If you have any questions, please contact Travel.**

- **A four-digit approved Request ID # from Concur will be needed to book travel arrangements.**

⇒ Flights and car rentals should be booked by calling Christopherson Business Travel (CBT) at 1-855-993-0939 or emailing them at University.Travel@cbtravel.com.

⇒ For Frequent Non-Employee Travel Arrangers:

Employees who frequently arrange travel for non-employees can be granted permission to book directly in Concur. To obtain this access, please email Travel at travel@csus.edu to request Guest Booking permission. Once approved, the “Book for a guest” link will appear on the Concur homepage.



⇒ **Airfare:**

Paid by the University Ghost Card when booked through CBT or Concur and must be included on the expense report for the non-employee (post travel). Refundable airline tickets must be purchased for non-employee travel as this reduces the overall liability for the University.

⇒ **Car Rental:**

Paid by the University Ghost Card when booked directly with Christopherson (CBT) or within Concur and must be included on the expense report for the non-employee (post travel). Please provide a memo to the non-employee granting them use of the CSU Enterprise contract.

⇒ **Hotel Reservations:**

The hotel must be booked outside of Concur by the non-employee. If the department wants to pay for this cost, we have a direct-bill arrangement with Springhill Suites in Marina if needed. Please reach out to travel@csumb.edu for more information.

Note: The non-employee may pay out of pocket for any of their travel expenses and request reimbursement. However, please make them aware of the expenses that are not allowable (seat assignments/upgrades, upgraded airfare from economy, room upgrades, rental car class above intermediate, insurance, tips above 20% for ground transportation, etc.).




EXPENSE REPORTS

Creating an Expense Report

Once the individual returns from their trip, the employee must prepare the Expense Report. Navigate back to the approved Request and click “Create Expense Report”, being sure to link the approved Request to the Expense Report.

⇒ **The Non-Employee Per Diem Worksheet** (Find on the CSUMB website under Accounts Payable > Travel > Forms) is a helpful tool to use when organizing and calculating the non-employees' expenses before you put them into Concur. The worksheet is especially helpful for calculating per diem when meals were provided. Please see the sample below:

City and Zip code (Only Enter Lodging Destinations)	Domestic Rates (GSA)	Alaska/Hawaii (DoD) or International Rates (State Dept)							
Sacramento	68								

Number of days between start and end date (0) don't match the number of dates being claimed below (3)

Travel Details		Provided Meals/ Meals outside of Trip							\$170.00
Location	Rate Type	Notes (optional)	Rate Rates/Day based on Rate Type	Travel Date	Personal Day? Yes = 1	# Provided Breakfasts	# Provided Lunches	# Provided Dinners	M&IE Total
Sacramento	First/Last Day Per Diem		\$51.00	5/13/2025	0	0	0	0	\$51.00
Sacramento	Full Day Per Diem		\$68.00	5/14/2025	0	0	0	0	\$68.00
Sacramento	First/Last Day Per Diem		\$51.00	5/15/2025	0	0	0	0	\$51.00

Navigate to the Report Header by clicking on the **Report Number** or going to Report Details> Report Header. Under Business Unit enter MB. Click on the drop-down arrow to change the search criteria from Text to Code or Either. Enter MB and the Non-Employee Name to find the name of the individual. Review the rest of the header information and click **Save**.

Not Paid | **Report Number: S4H5FO**

Report Details ▼ **Print/Share** ▼ **Manage**

Report

Report Header

⇒ Add the expenses for the trip in Concur by clicking Add Expense for each expense that needs to be added. If airfare*, rail or car rental was booked via Concur, please add the credit card expenses found under 'Available Expenses'.

***Note: Airfare will have two transactions: airfare and an agent fee.**

Add Expense to Report							
Create New Expense		Select Available Expenses (11)					
<input type="checkbox"/>	Payment Type↓↕	Expense Source	Expense Type↓↑	Vendor Details↓↑	Date↓↑	Amount↓↑	
<input type="checkbox"/>	*Ghost Card-USBank	Corporate Card	Airfare	SOUTHWES 5267230660092	02/06/2025	\$383.94	...
<input type="checkbox"/>	*Ghost Card-USBank	Corporate Card	Airfare	AGENT FEE 8900896557019	02/06/2025	\$17.00	...

⇒ If any expenses are paid via a P-Card, IFT or PO, please add them to the Expense Report and change the Payment Type to University Paid.

⇒ Once all expenses have been added, review the audit warnings for any additional requirements (cost comparison, agenda, etc.) and take action accordingly to ensure all requirements are satisfied.

⇒ If all requirements are met, click '**Submit Report**' to put the expense report into the approval queue. Once approved by the DOA, the 'Reports To' of the delegate, and Travel, the reimbursement will be issued in the next payment run by AP.