Managing Per Diem for Concur Expense Reports

Description
This job aid describes how to include per diem when creating a new Concur expense report.

Navigation
Concur > Expense > Create New Expense Report

Once the Report Header information has been completed with a Report Name, Business Purpose, etc. and the Next >> button has been clicked, the Travel Allowances alert box, shown below, will appear.

Travel Allowances Pane – Create New Itinerary

To manually enter an itinerary:

2. Complete the New Itinerary Stop pane for each leg of your departure flight as follows:
   - Begin typing the name of the Depart from (city), then select the applicable location from the drop-down list.
   - Select the departure Date from the calendar.
   - Type the departure Time.
   - Begin typing the name of the Arrive in (city), then select the appropriate location from the drop down list.
   - Select the arrival Date from the calendar.
   - Type in the arrival Time.

⚠️ Your itinerary is for business-related travel only. If your trip included personal travel prior to/after the business travel, adjust the departure and arrival dates for the itinerary to exclude the personal travel.

3. Click Save.

4. Repeat steps 3 – 4 for each leg of your return flight (not shown).

5. Click Next to go to the Available Itineraries page.

Concur displays a list of matching values as you enter a value in a search field (e.g., Depart from). Select the applicable value from this list.

Note: Concur may not list every available location. If necessary, select the closest city to your departure/arrival location.
To manually enter an itinerary:

6. Click Go to Single Day Itineraries.

7. Select the Start Date from the calendar.

8. Click Go.

Note: Dates will display a week at a time.

9. Complete all fields as follows:
   - Type in the Start Location.
   - Type in the Depart time.
   - Type in the End Location.
   - Type in the Arrive time.
   - Type in the Depart time from the End Location.
   - Type in the Back at Origin time.

10. Repeat step 9 for each single day trip (not shown).

11. Click Save Itineraries.

12. Click Next.

13. Click Next to assign the itinerary you just created or imported to the expense report.

Note: To assign multiple itineraries to the report, use the options in the Available Itineraries list.

- You cannot have multiple itineraries with the same date range in Concur.
14. Review the per diem expense for each day.

15. If applicable, click the pertinent Breakfast-, Lunch-, or Dinner Provided checkboxes.

Note: Clicking a Provided checkbox reduces the per diem rate based on the meal selected and ensures you are not reimbursed for travel meals twice.

- Days on which travel occurs automatically have a reduced per diem rate per the GSA.

16. Click Create Expenses.

17. Verify that imported per diem expenses (Fixed Meals) appear in the Expenses list.

⚠️ If you forget to include travel allowances as you are beginning your expense report (i.e., clicked “No” instead of “Yes” to the Travel Allowance question) use the following steps to add the itinerary and adjust the travel allowances, as applicable:

2. Using the Create New Itinerary pane, build the itinerary for all stops within the trip.
3. Click on the Expense Adjustments tab to exclude any provided meals from the daily per diem.
4. Click the Update Expenses button to add the per diem expenses to the expense report.