

How to Claim Per Diem in Concur

This Quick Reference Guide demonstrates how to claim Per Diem in **Concur**.

There are two ways to claim Per Diem in Concur: the first is by creating an itinerary, which will allow you to create a **Daily Allowance**; the second is by manually entering the Per Diem amount using the **Miscellaneous Travel** expense type. All guest accounts will need to use the Miscellaneous Travel method. For this method, please skip to Page 5

Creating a Daily Allowance

- A **Daily Allowance** in Concur is the **Meals and Incidentals** Per Diem rate set by the U.S. Government for the region visited

The screenshot shows the Concur expense report interface. At the top, there are links for 'Manage Expenses' and 'View Transactions'. Below that is a yellow alert banner with a warning icon and the text 'Alerts: 1'. The main report title is 'test \$1,200.00' with a status of 'Not Submitted'. To the right of the title are two buttons: 'Delete Report' and 'Submit Report'. Below the title is a navigation bar with 'Report Details' (highlighted with a red box), 'Print/Share', and 'Manage Receipts'. A dropdown menu is open under 'Report Details', listing various options: 'Report', 'Report Header', 'Report Totals', 'Report Timeline', 'Audit Trail', 'Allocation Summary', 'Linked Add-ons', 'Manage Requests', and 'Manage Travel Allowance' (highlighted with a red box). Below the menu is a table of expense items with columns for 'Payment Type', 'Expense Type', 'Vendor Details', 'Date', and 'Requested'. One item is visible: 'Out of Pocket' for 'Accommodations (513500, 513700)' at 'Best Western International Boston, Massachusetts' on '03/28/2019' for a requested amount of '\$1,200.00'.

1	Click the Report Details drop down within expense report
2	Select Manage Travel Allowance . A new frame will appear in your browser.

- | | |
|---|---|
| 3 | Fill out first Itinerary Stop on landing page (this will include Departure and Arrival cities and times). Note: DO NOT click Next after filling out the above |
| 4 | Click Save |
| 5 | Select the blue Add Stop button to add an additional Itinerary Stop.
If the trip involves travel to only one destination, this will be the Return Trip |
| 6 | Click Save |

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: test

Buttons: Add Stop, Delete Itinerary, Import Itinerary

Departure City	Arrival City	Arrival Rate Location
Boston, Massachusetts 03/04/2019 10:00 AM	New York, New York 03/04/2019 01:00 PM	NEW YORK COUNTY, US-NY, US
New York, New York 03/08/2019 09:00 AM	Boston, Massachusetts 03/08/2019 12:00 PM	SUFFOLK COUNTY, US-MA, US

New Itinerary Stop

Departure City: Boston, Massachusetts

Date: [] Time: []

Arrival City: []

Date: [] Time: []

Buttons: Save, Go to Single Day Itineraries, Next >>, Cancel

- | | |
|----------|---|
| 7 | Click Next |
| 8 | You are now viewing the Assigned Itinerary . If your Itinerary looks correct, hit Next (clicking Previous will allow you to go back and edit your work). |

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Buttons: Edit, Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: test				
Boston, Massachusetts	03/04/2019 10:00 AM	New York, New York	03/04/2019 01:00 PM	NEW YORK COUNTY, US-NY, US
New York, New York	03/08/2019 09:00 AM	Boston, Massachusetts	03/08/2019 12:00 PM	SUFFOLK COUNTY, US-MA, US

Available Itineraries

Current Itinerary: [] Buttons: Delete, Assign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

Buttons: << Previous, Next >>

9	Indicate any included meals during travel dates by selecting appropriate check boxes. Concur will adjust your Allowance accordingly.
10	Click Create Expenses .

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to

Exclude All <input type="checkbox"/>	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	03/04/2019 New York, New York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$57.00
<input type="checkbox"/>	03/05/2019 New York, New York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$76.00
<input type="checkbox"/>	03/06/2019 New York, New York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$76.00
<input type="checkbox"/>	03/07/2019 New York, New York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$76.00
<input type="checkbox"/>	03/08/2019 New York, New York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$57.00

You have successfully claimed Per Diem in Concur:

test \$342.00

Not Submitted

Report Details ▾ Print/Share ▾ Manage Receipts ▾

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date ▾	Requested
<input type="checkbox"/>		Out of Pocket	Daily Allowance (513500, 513700)	New York, New York	03/08/2019	\$57.00
<input type="checkbox"/>		Out of Pocket	Daily Allowance (513500, 513700)	New York, New York	03/07/2019	\$76.00
<input type="checkbox"/>		Out of Pocket	Daily Allowance (513500, 513700)	New York, New York	03/06/2019	\$76.00
<input type="checkbox"/>		Out of Pocket	Daily Allowance (513500, 513700)	New York, New York	03/05/2019	\$76.00
<input type="checkbox"/>		Out of Pocket	Daily Allowance (513500, 513700)	New York, New York	03/04/2019	\$57.00
						\$342.00

Miscellaneous Travel

- The Miscellaneous Travel expense type can be used as an alternative to creating a daily allowance. All Per Diem expense in Guest Accounts must be reimbursed utilizing this method.

1	Select the Miscellaneous Travel expense type from the list of available expenses.
2	Enter the Business Purpose as "Per Diem."

3	Enter the Traveler's name under Vendor Name
4	Enter the Amount as the total amount being claimed
5	In the comments box, indicate the number of days and dollar amount per day being claimed
6	Click Save

Primary Destination (1, 2)	County (3, 4)	Max lodging by month (excluding taxes)												M&IE (5)	
		2015			2016										
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep		
Standard Rate	Applies for all locations without specified rates	\$89	\$89	\$89	\$89	\$89	\$89	\$89	\$89	\$89	\$89	\$89	\$89	\$89	\$51
Albany	Albany	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$59
Brighamton / Owego	Broome / Tioga	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$59
Buffalo	Erie	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$64
Floral Park / Garden City / Great Neck	Nassau	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$69
Glens Falls	Warren	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$99	\$160	\$160	\$99	\$64
Ithaca / Waterloo / Romulus	Tompkins / Seneca	\$121	\$121	\$121	\$121	\$121	\$121	\$121	\$121	\$121	\$121	\$121	\$121	\$121	\$59
Kingston	Ulster	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$69
Lake Placid	Essex	\$115	\$115	\$140	\$140	\$140	\$107	\$107	\$107	\$107	\$107	\$172	\$172	\$115	\$74
New York City	Bronx / Kings / New York / Queens / Richmond	\$306	\$306	\$306	\$181	\$181	\$270	\$270	\$270	\$270	\$242	\$242	\$306	\$74	
Niagara Falls	Niagara	\$89	\$89	\$89	\$89	\$89	\$89	\$89	\$89	\$89	\$114	\$114	\$89	\$59	
Nyack / Palisades	Rockland	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$112	\$64	
Poughkeepsie	Dutchess	\$104	\$104	\$104	\$104	\$104	\$104	\$104	\$104	\$104	\$104	\$104	\$104	\$64	

7	<p>The receipt should be an attached screenshot of the State Department or GSA set rate for the region being visited during the month of travel.</p> <p>Note: Travel Days are reimbursable for 75% of the daily meals and incidentals rate.</p>
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