

## HOW TO CLAIM PER DIEM IN CONCUR

**What?** This guide demonstrates how to claim per diem in Concur.

- Per diem is a daily allowance for expenses based on a fixed amount per day to cover the cost of lodging and/or meals and all related taxes and gratuities incurred.
- For domestic travel, per diem rates are established by the General Services Administration (GSA).
- Foreign rates are established by the U.S. State Department.

**When to claim per diem:** When approved in advance, a traveler may be able to use a per diem allowance for meals. Use of a per diem allowance may be appropriate when traveling on a grant, when the sponsoring agency has stipulated a per diem allowance or for extended travel durations where it would be administratively burdensome to maintain actual cost receipt detail. Use of a per diem allowance must be pre-approved by an employee’s supervisor. For more details on per diem allowance, please see the [Travel and Business Expense Policy](#).

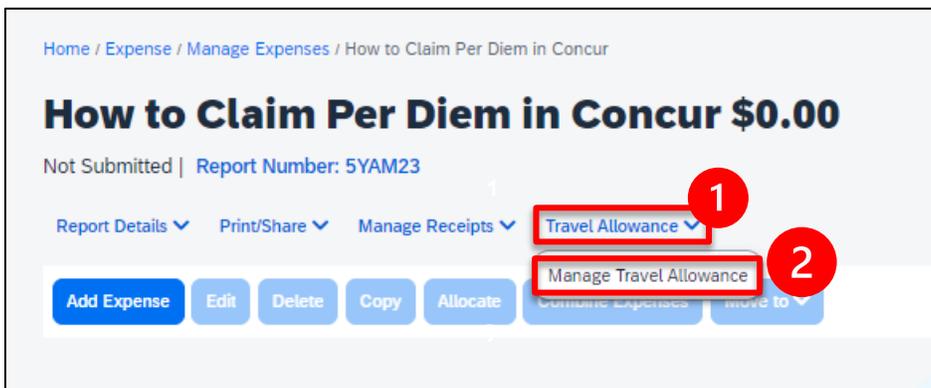
Two ways to claim Per Diem in Concur:

- (1) Create an itinerary, which will allow you to create a **Travel Allowance**
- (2) Manually enter 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 4.

### OPTION 1: CREATE AN ITINERARY FOR A DAILY TRAVEL ALLOWANCE

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

1. Click the “**Travel Allowance**” dropdown within the Expense Report
2. Select “**Manage Travel Allowance**”



3. Fill out the first “**New Itinerary Stop**” section on the landing page (this will include Departure and Arrival cities and times). Do not click “Next after filling out the above.”
4. Click “**Save.**”

Travel Allowances For Report: How to Claim Per Diem in Concur

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

### Itinerary Info

Itinerary Name  
How to Claim Per Diem in Concur

**Add Stop** **Delete Rows** **Import Itinerary**

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found			

#### New Itinerary Stop

Departure City  
Boston, Massachusetts

Date: 01/15/2024 Time: 6:00 AM

Arrival City  
San Diego, California

Date: 01/15/2024 Time: 11:00 AM

**Save**

[Go to Single Day Itineraries](#) [Next >>](#) [Cancel](#)

5. Select the blue “**Add Stop**” button to add an additional itinerary stop. If the trip involves travel to only one destination, this additional stop will be for the Return Trip.
6. Click “**Save**” and “**Next.**”

Travel Allowances For Report: How to Claim Per Diem in Concur

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

### Itinerary Info

Itinerary Name  
How to Claim Per Diem in Concur

**Add Stop** **Delete Rows** **Import Itinerary**

<input type="checkbox"/>	Departure City	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Boston, Massachusetts	San Diego, California	SAN DIEGO COUNTY, US-CA, US
	01/15/2024 06:00 AM	01/15/2024 11:00 AM	

#### New Itinerary Stop

Departure City  
San Diego, California

Date: 01/21/2024 Time: 10:00 PM

Arrival City  
Boston, Massachusetts

Date: 01/22/2024 Time: 6:00 AM

**Save**

[Go to Single Day Itineraries](#) [Next >>](#) [Cancel](#)

- Review the Assigned Itinerary. If all looks correct, click **“Next.”** Note: if you click **“Previous,”** you will be able to go back and edit the information entered.

Travel Allowances For Report: How to Claim Per Diem in Concur

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

**Assigned Itineraries**

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: How to Claim Per Diem in Concur				
Boston, Massachusetts	01/15/2024 06:00 AM	San Diego, California	01/15/2024 11:00 AM	SAN DIEGO COUNTY, US-CA, US
San Diego, California	01/21/2024 10:00 PM	Boston, Massachusetts	01/22/2024 06:00 AM	SUFFOLK COUNTY, US-MA, US

**Available Itineraries**

Current Itineraries

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

<< Previous **Next >>**

- Indicate any include meals during travel dates by selecting the appropriate check boxes. Concur will adjust your allowance accordingly.
- 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"/>	01/15/2024 San Diego, California	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.50
<input type="checkbox"/>	01/16/2024 San Diego, California	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$74.00
<input type="checkbox"/>	01/17/2024 San Diego, California	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$40.00
<input type="checkbox"/>	01/18/2024 San Diego, California	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$74.00
<input type="checkbox"/>	01/19/2024 San Diego, California	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$57.00
<input type="checkbox"/>	01/20/2024 San Diego, California	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$39.00
<input type="checkbox"/>	01/21/2024 San Diego, California	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$74.00
<input type="checkbox"/>	01/22/2024 San Diego, California	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.50

<< Previous **Create Expenses** Cancel

The screenshot shows the 'Allocate' form in Concur. The 'Expense Type' is set to 'Miscellaneous Travel (513500, 513700)'. The 'Transaction Date' is '01/22/2024'. The 'Business Purpose' is 'Per Diem'. The 'Enter Vendor Name' field contains 'John Smith'. The 'City of Purchase' is 'New York, New York'. The 'Payment Type' is 'Out of Pocket'. The 'Amount' is '148.00'. The 'Currency' is 'US, Dollar (USD)'. The 'Comment' field contains 'Two Days at \$74 per day.'.

Option 1 complete - You have successfully claimed per diem in Concur.

**OPTION 2: USE THE MISCELLANEOUS TRAVEL EXPENSE TYPE**

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

1. Select **Miscellaneous Travel** from the list of available Travel Expense types.

The screenshot shows the 'Add Expense' dialog box. It has a search bar and a list of expense types. Under '01. Travel Expenses', the following items are listed: Accommodations (513500, 513700), Hotel Internet Fees (513500, 513700), Hotel Phone/Fax (513500, 513700), Incidentals (513500, 513700), Laundry (513500, 513700), and Miscellaneous Travel (513500, 513700). The 'Miscellaneous Travel (513500, 513700)' item is highlighted with a red box.

2. Enter the **Business Purpose** as “Per Diem.”
3. Enter the traveler’s name in the **Vendor Name** field.
4. Enter the total amount being claimed in the **“Amount”** field
5. In the **comments** box, indicate the number of days and dollar amount per day to be claimed.
6. Click **“Save”**
7. Click **“Add Receipt”** and upload a screenshot of the State Department or GSA set rate for the region being visited during the month of travel. Note: travel days are reimbursable for only 75% of the daily meals and incidentals rate

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
Binghamton / 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	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$115	\$69
New York City	Bronx / Kings / New York / Queens / Richmond	\$306	\$306	\$306	\$181	\$181	\$270	\$270	\$270	\$270	\$270	\$242	\$242	\$306	\$74

Option 2 complete - You have successfully claimed per diem in Concur.