

### Concur Travel Request and Expense Report – Job Aid for Participants/Fellows

**Important Tip**: Prior to creating and submitting your Concur Travel Request, please complete the following tasks:

- Be mindful of your travel allowance balance. You can check your balance by navigating from the Concur **Home** page to **Budget Dashboards**.
- Review the Travel Policies on the ORAU Participant Site
  - o ORAU Travel Center For ORAU Research Participants
- NPP Fellows: Contact <u>NPPTravel@orau.org</u> with any questions.
- ARL RAP Participants: Contact <u>ARLFellowship@orau.org</u> with any questions.

### NOTE:

- A red asterisk \* indicates a required field.
- Grey question marks "?" are **Tool Tips** to assist you. To see the Tool Tips, hoveryour cursor over the "?".

To complete a travel request, log into <u>Zintellect - Climb Higher</u>, select **View Travel** on your participant dashboard, then select **Go to Concur**.

🕆 Dashboard	Opportunity Catalog	⑦ About -			() Help	Welcome 🗸 🗸
My Offers	My Favorites			Click here to access the Trave	el 🦯	→ ¥ View Travel
Advanced	l Bearings for Oil-Fre	e Compact Turbo	machinery	Dashboard and t access Concur	0	ORAU
Offer Accep Apt. Dates	nted : 11/2/2020 - 11/1/2021 1 Apt. Letter 🚺 Download Term:	s of Apt.				~
Comple	e Documents					



Enter Keyword			Click H more int about	nere for formation this trip
Report Name	Start Date 🔶	End Date 🔶	Approved Expense	Approved Status
Dallas, TX 1/25-28/21	1/25/2021 12:00:00 AM	1/28/2021 12:00:00 AM	\$1509.00	Approved
Testing for	11/7/2021 12:00:00 AM	11/13/2021 12:00:00 AM	\$1972.00	Not Submitted
Washington DC 1/17/21-1/21/21	1/17/2021 12:00:00 AM	1/21/2021 12:00:00 AM	\$2885.40	Approved



#### Effective Date: March 17th, 2025

**Purpose:** to provide instructions for the new process of adding a travel allowance itinerary for meal and incidental per diems beginning with a travel request copying to an expense report.

- New travel requests and expense reports created on or after March 17<sup>th</sup> begin on page 1.
- Creating itineraries for approved travel requests without an expense report <u>skip to page 12.</u>

#### **Create New Travel Request**

• From the Concur home screen navigate to Create > Start a Request

Concur Home V	Ś.		0	DT
	⊕ Create ↓	Authorization Requests 1 D View Trips 0 B Available Expenses 0 D Expense Reports 0		
Start a Requ Start a Repo	est nt oncur	Alerts   You are eligible for a free subscription to Tripht Pro, provided by your employer. Learn More and Activate. Not right now		
Select Traveler T	pe	You haven't signed up to receive e-receipts. Sign up here Sign up here		
<u>+</u> €	ji Pi	Company Notes		

o Complete the travel request header and select Create Request.

Create New Request					×
					<ul> <li>Required field</li> </ul>
Request Policy *		Request Name * 🚱		Supplemental Request	
Travel Request Policy	~	Oak Ridge, TN 2/24/25-2/26/25		Request ID	× ~
Request/Trip Start Date *		Request/Trip End Date *		Trip Type *	
02/24/2025	8	02/26/2025	e	Domestic Travel	~
Are you attending a conference, training or seminar? * 🚱		Booking Type * 🚱		Main Destination City * 🔞	
No	~	1. On-Line in Concur	~	Oak Ridge, Tennessee	× ×
Main Destination Country		Business Purpose *	12/500		
UNITED STATES (US)		Team meeting			
			Å		
Project *	1	Task *	2		
Test Project	× •	Test Task	× ~		
Does this trip include personal travel days? * 🚱		List Date Range for BUSINESS Travel Only in Date Format 🚱		Deviating from work airport OR driving > 350 miles one way?	
No	~			No	~
Airport of Official Duty Station or Work Location 🚱					
(DFW) Dallas/Fort Worth International Airport, USA	× ~	Cost Comparison Acknowledgment 🚱			
Comment					0/500
					Create Request
					Create riedoen



Creating a Travel Request and Expense Report with Travel Allowance

#### Add Travel Allowance Itinerary

- To add <u>per diem meals and incidentals</u>, create a travel allowance itinerary before adding your expected expenses by navigating to Manage Travel Allowance > Add Travel Allowance.
- *If you do not need meal and incidental per diems and/or lodging you do not need to create a travel allowance itinerary.*

Home / Requests / Manage Requests / Oak Ridge, TN 2/24	/25-2/26/25	
Alerts: 1		<b>~</b>
Oak Ridge, TN 2/24/25 Not Submitted   Request ID: 7KW9	-2/26/25	Submit Request Copy Request Delete Request
Request Details V Print/Share V Attachments V	Manage Travel Allowance  Add Travel Allowance	• Add Edit Delete Allocate
	No Expected Expenses	
	Add expected expenses and/or travel plans to this request to submit for approval.	

- Enter travel allowance itinerary information:
  - Start Location | Start Time: enter the location and time travel begins.
  - Arrival Location: enter the city of lodging.
    - **NOTE:** enter the city you are staying in overnight, not the airport city.
    - If you are not staying overnight, select the "Without overnight" checkbox.
  - End Location | End Time: enter the location and time travel ends.

**NOTE:** Single day travel allowance itinerary functionality is not yet available in the new travel allowance. See section named <u>Single Day Travel Allowance Itinerary on page 11</u> for more information.

**NOTE:** for **multiple overnight stays at different locations**, select "Add Destination" in blue. For **international travel or overnight flights**, select "Detailed Itinerary".

Travel Allowance				
Itinerary				
	$\searrow$			* Required
Oak Ridge, TN 2/24/25-2/26/25	Detailed Itinerary 🚱	Without overnight 🚱		
Start Location *	Start Date *	Start Time *		
O Dallas, Texas	✓ 02/24/2025	8:00 AM	0	
+ Add Destination				
Arrival Location *				
Oak Ridge, Tennessee	~			
+ Add Destination				
End Location *	End Date *	End Time *		
<ul> <li>Dallas, Texas</li> </ul>	✓ 02/26/2025	6:00 PM	0	

Select Next



Creating a Travel Request and Expense Report with Travel Allowance

- After selecting Next, the **Travel Allowance Adjustment** screen displays. The allowance limits for nightly lodging and meal and incidental per diem amounts display.
- The amount displayed in the Allowance Limit is 200% of the GSA hotel per diem rate for the arrival location. The Reimbursement Amount is the reimbursement rate for meals and incidentals for the location.
   Note: Meal and incidental per diems are reduced to 75% of the reimbursement rate on first and last days of travel.
- Exclude any known provided meals or personal days from this screen
  - **Exclude Day:** if the entire day is a personal travel day, select the check box in this column next to the personal travel day. This will zero out the amounts in the **Allowance Limit and Reimbursement Amount** columns.
  - Breakfast, Lunch or Dinner Provided: check the box for the dates for known provided meals.
     Note: meals provided can be adjusted when the expense report is created.
  - **Percent Rule:** this box should always be checked to automatically calculate the lodging allowable limit. Do not remove the checkboxes.
- Select Finish.

Travel Allowance							
Adjustments							
Here you can declare any free meals received to reduce your daily allowance	e. You can also claim additional allowances, for e	xample if you stayed overnight with	friends or family. Days can b	e excluded from your trip, for	example if you are on personal leave. Al	ways refer to your company policy guidelines.	
View: Adjustments 💙 Show Filters							
Date/Location	Exclude Day	Breakfast Provided	Lunch Provided	Dinner Provided	Percent Rule	Allowance Limit 🕢	Reimbursenent Amount @
All Days Dates: 3							
Mon, 02/24/2025 Oak Ridge, UNITED STATES @						\$220.00	\$51.00
Tue, 02/25/2025 Oak Ridge, UNITED STATES 🚱						\$220.00	\$49.00
Wed, 02/26/2025 Oak Ridge, UNITED STATES @						\$0.00	\$51.00
						Total: \$440.00	Total: \$151.00
Back							Finish Cancel

- After selecting Finish, Travel Allowances for meals and incidentals will populate in your travel request as one line. *[this is a change from the existing process of adding an expected expense for meals per diem]*
- o Select the down arrow to the right-hand side to open lines for meals and incidentals.

Home / Requests / Manage Requests / Oak Ridge, TN 2/24/25-2/26	6/25	
Alerts: 1		×
Oak Ridge, TN 2/24/25-2/	26/25 \$182.50	Submit Request Copy Request Delete Request
Not Submitted   Request ID: 7KW9		
Request Details V Print/Share V Attachments V Mana	ge Travel Allowance 🗸	
EXPECTED EXPENSES		C Add Edit Delete Allocate
EXPECTED EXPENSES	DetailsJ↑	⊙ Add     Edit     Delete     Allocate       Datej <sup>‡</sup> Amountj†     Requested j†
EXPECTED EXPENSES	<b>Details↓↑</b> Oak Ridge, Tennessee	O Add         Edit         Delete         Allocate           DatejF         Amountj↑         Requestedj↑           02/24/2025 - 02/26/2025         \$182.50         \$182.50         ✓
EXPECTED EXPENSES  Expense type↓↑  Travel Allowances	<b>Details↓î</b> Oak Ridge, Tennessee	O Add         Edit         Delete         Allocate           Date↓F         Amount↓↑         Requested↓↑           02/24/2025 - 02/26/2025         \$182.50         \$182.50           \$182.50         \$182.50



- Meals per diem and Incidentals per diem display as two separate lines under the Travel Allowances summary. [*this is a change in process from the previous travel allowance where meals and incidentals were combined together as meals per diem*]
- Now add your expected expenses. *This job aid includes examples for Air Ticket and Hotel Reservation. Your expected expenses may vary.*

Alert	s: 1					~
ak	Ridge, TN 2/24/25-2/26/25	\$182.50	Submit Requ	Copy Req	juest Delete	e Request
Submi	itted   Request ID: 7KW9					
	etails V Print/Share V Attachments V Manage Travel Attowner TED EXPENSES	ce∀		• Add	Delete Al	locate
	Expense type↓↑	Details↓↑	Date↓≓	Amount <b>↓</b> ↑ Re	equested↓↑	
	Expense type↓↑ Travel Allowances	DetailsJ↑ Oak Ridge, Tennessee	Date↓₹ 02/24/2025 - 02/26/2025	Amount1 Re \$182.50	equested↓↑ \$182.50	
	Expense typeL1 Travel Allowances Meats - per diem	Details↓↑ Oak Ridge, Tennessee 02/24/2025 - 02/26/2025 : 3 Days	Date J.F 02/24/2025 - 02/26/2025 02/24/2025	Amount↓↑ Re \$182.50 \$170.00	equested 1 \$182.50 \$170.00	
	Expense typeLT Travel Allowances Meals - per diem Incidentals - per diem	Details↓↑           Oak Ridge, Tennessee           02/24/2025 - 02/26/2025 : 3 Days           02/24/2025 - 02/26/2025 : 3 Days	Date1         7           02/24/2025 - 02/26/2025         02/24/2025           02/24/2025         02/24/2025	Amount↓↑         Re           \$182.50	equested 1 \$182.50 \$170.00 \$12.50	

#### • Add air ticket

Quick Tips Sh     PLEASE NOTE:	ow Less Estimate high as	fares change often. If yo	ur actual fare is t	higher, additional approva	al will be needed, de	slaying ticketing.	
Round Trip One	Way Multi G	City					
Outbound							
							* Required fiel
From *	tl (Airport .	EWO Dallas Toya			× ×	To *	× ×
	in (Airport - L	or w), Dattas, Texa.			~ ·	Medice Tyson (Aliport - 115), Moxvite, Tennessee	~ •
02/24/2025	<b>E</b>	Departure time	~	10:00 AM	0	Comment	0/200
irport of Official Duty	Station or Work	Location					
irport of Official Duty DFW Return	Station or Work	Location					
Airport of Official Duty DFW Return Date * 02/26/2025	Station or Work	Location Departure time	~	Depart at * 01:00 PM	٥	Comment	0/200
Virport of Official Duty DFW Return Date * 02/26/2025	Station or Work	Departure time	~	Depart at * 01:00 PM	٥	Comment	0/200
Airport of Official Duty DFW Return Date * 02/26/2025	Station or Work	Departure time Location	~	Depart at * 01:00 PM	٩	Comment	0/200
Seturn Seturn 02/26/2025 Urport of Official Duty DFW	Station or Work	Departure time Location	~	Depart at * 01:00 PM	0	Comment	0/200
Airport of Official Duty DFW Return Date * 02/26/2025 Airport of Official Duty DFW	Station or Work	Departure time	✓ Currency *	Depart at * 01:00 PM	٩	Comment	0/200

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#### o Add Hotel Reservation

New Expense:	Hotel Reserva	ation			Save Cancel
Quick Tips Show Less     PLEASE NOTE: hotels over 2     An itemized paid receipt is re	200% of the GSA rate, will require a equired.	additional documentation and approval			
Check-In					* Required field
Date		At		City* 🖗	
02/24/2025	Ë	hh:mm A	0	Oak Ridge, Tennessee	× •
Location Preference / Address Reference	Point * 🕜				
Near ORAU					
Check-Out					
Date		At			
02/26/2025	Ë	hh:mm A	0		
Additional Comments			0/2000		
			6		
SEE 7: Agency to reserve lodging when be	ooking airfare 🚱				
No			~		
Amount * 🕜		Currency *			
250.00		US, Dollar	~		
Save Cancel					

o Continue adding all needed expected expenses for your travel request. When you are finished Submit Request.

	×				
5-2/26/25 \$782.50	Submit Request Copy Request Delete Request				
ubmitted   Request ID: 7KW9					
Manage Travel Allowance 🗸					
	O Add Edit Delete Allocate				
Details↓↑	Date↓ <sup>⊭</sup> Amount↓† Requested↓†				
Dallas (DFW) - Knoxville (TYS) : Round Trip	02/24/2025 \$350.00 \$350.00				
Oak Ridge, Tennessee	02/24/2025 \$250.00 \$250.00				
Oak Ridge, Tennessee	02/24/2025 - 02/26/2025 \$182.50 \$182.50 ¥				
	5-2/26/25 \$782.50 Manage Travel Allowance ✓ Details1 Dallas (DFW) - Knowlile (TYS) : Round Trip Oak Ridge, Tennessee Oak Ridge, Tennessee				

o The ORAU Request Traveler Agreement will pop up. Select Accept and Continue.

ORAU Request Traveler Agreement
By clicking on the 'Accept & Continue' button, I certify that:
This travel request is a true and accurate estimation of expenses that will be incurred to accomplish the stated business purpose. The charges will be completed by the lowest reasonable cost method and I will comply with all ORAU policies and Federal Travel Regulations.
***I ALSO CERTIFY I UNDERSTAND I AM REQUIRED to obtain and attach a COST COMPARISON to this travel re- quest AND to the related expense report if my travel request includes any of the following scenarios:
*Personal travel days
*Airport deviations from my duty station
*Personal car mileage exceeding 350 miles one way
Cancel Accept & Continue



#### Create Expense Report from the Approved Request

- Navigate to Requests > Manage Requests and find your approved travel request after your trip has ended.
- Open the travel request and select Create Expense Report.

Manage Reque	sts	
View: Active Requests 🗸		
Oak Ridge, TN 2/24/25-2/26 02/24/2025   7KW9 \$782.50	25 🛦	
/ Requests / Manage Requests / Oak Ridg Alerts: 1	n. TN 22425-22625	~
/ Requests / Manage Requests / Oak Ridg Alerts: 1 <b>ak Ridge, TN 2/2</b> 4	*. TH 22425 22625 4/25-2/26/25 \$782.50	Creats Expense Report Copy Request Cancel Request Close Request
) Requests / Manage Requests / Oak Ridg Alerts: 1 <b>ak Ridge, TN 2/2</b> 4 oved   Request ID: 7KW9	». TN 22425-276625 4/25-2/26/25 \$782.50	Create Expanse Report Copy Request Close Request Close Request
] / Requests / Manage Requests / Oak Ridg Alerts: 1 <b>ak Ridge, TN 2/24</b> oved   Request ID: 7KW9 uest Details ~ Print/Share ~ Attach	w. TN 22425-22625 4/25-2/26/25 \$782.50 ments V Manage Travel Allowance V	Create Expense Report Copy Request Cancel Request Close Request
Requests / Manage Requests / Oak Rdg Alerts: 1 Ik Ridge, TN 2/2/ wed   Request ID: 7KW9 west Details ~ Prior/Share ~ Attach IPECTED EXPENSES	n, TN 22425-2/26/25 4/25-2/26/25 \$782.50 ments v Manage Travel Allowance v	Create Expense Report Copy Request Close Request Close Request
/ Requests / Manage Requests / Oak Ridg Alerts: 1 Ik Ridge, TN 2/2/ wed   Request ID: 7KW9 est Detaits ~ Print/Share ~ Attach PECTED EXPENSES supense type1[	re, TV 22425-2/26/25 4/25-2/26/25 \$782.50 ments v Manage Travel Allowance v Details1	Create Expense Report Copy Request Cancel Request Close Request Date J <sup>2</sup> Amount j <sup>2</sup> Requested j <sup>2</sup>
/Requests / Manage Requests / Oak Ridg Alerts: 1 IK Ridge, TN 2/24 wed   Request ID: 7KW9 est Details \u2264 PhirtShare \u2264 Attach PECTED EXPENSES uponse typeIf * Toket	re, TN 22425-22625 4/25-2/26/25 \$782.50 ments V Manage Travel Allowance V Details 11 Datius (DFW) - Knarville (TYS) : Round Trp	Create Expanse Report Copy Request Cancel Request Close Request           Date IF         Amount [1         Requested [1]           02/242025         \$350.00         \$350.00
/ Requests / Manage Requests / Oak Rid Alerts: 1 Alerts: 1 Alert	e. TN 272425-272625 4/25-2/26/25 \$782.50 ments ~ Manage Travel Allowance ~ Details 1 Datails (DFW) - Knowrite (TVS) : Round Trip Oak Ridge, Tennessee	Create Expense Report         Copy Request         Cancel Request         Close Request           DateJF         Amount][         Requested][         02/242025         5350.00         5350.00           02/242025         5350.00         5350.00         5350.00         5350.00
/ Requests / Manage Requests / Oak Rid Alerts: 1 Alerts: 1 Alerts: D. 7KW9 wed Details © Print/Share © Attach PECTED EXPENSES repense type11 ir Tacket tel Reservation wel Allowances	e. TN 202425 202025 A/25-2/26/25 \$782.50 ments V Manage Travel Allowance V Details 1 Datas (DFW) - Knowlie (TYS) : Round Trp Oak Ridge, Tennesse Oak Ridge, Tennesse	Create Expense Report         Copy Request         Cancel Request         Close Request           Date IF         Amount IT         Requested IT           02242025         \$350.00         \$350.00           02242025         \$250.00         \$250.00           02242025         \$182.50         \$182.50         ¥

Notice Meals and Incidentals are carried over from your travel request and pre-populated in your expense report.
 View and modify the travel allowance itinerary created in the travel request, if needed, by navigating to Travel Allowance > Edit Travel Allowance

tot Submitted   Report Number: JP1QC6							
pproved 782.50	IT						
port De	tails ❤ Print/Share ❤ Manage Receipts ❤ 1	fravet Allowance 🛩			View Available Receipts 📗		
Expenses Edt Delete Copy Allocate Combine Expenses Move V							
0	Receipt↓† Payment Type↓†	Expense Type↓↑	Vendor Details↓↑	Date↓ <sup></sup>	Requested↓†		
Ο	Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/26/2025	\$3.75 •••		
0	Cash	Meals - per diem	Oak Ridge, Tennessee	02/26/2025	\$47.25		
Ο	Cash	Meals - per diem	Oak Ridge, Tennessee	02/25/2025	\$44.00 ***		
0	Cash	Incidentals - per diem	Oak Ridge. Tennessee	02/25/2025	\$5.00		
	Cash	Meals - per diem	Oak Ridge, Tennessee	02/24/2025	\$47.25		
0	Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/24/2025	\$3.75		



#### o Make any needed modifications and select Next

Travel Allowance				
Itinerary				
				Required
Oak Ridee TN 2/24/25-2/26/25	Detailed Itineratio	Without councilable (2)		
om mage, in anna anona	Ortando Inninary O	monat overlaget 😈		
Start Location *	Start Date *	Start Time *		
O Dallas, Texas 🗸	02/24/2025	8:00 AM	0	
+ Add Destination				
Arrival Location *				
Oak Ridge, Tennessee				
de Add Destination				
+ Add Destination				
End Location *	End Date *	End Time *		
		0.0011		
				_
			Ne	x: Adjust your travel allowance Next Cancel

- From the Travel Allowances Adjustments screen, adjust for any meals provided or exclude personal days.
- NOTE: remember to <u>never remove</u> the checkboxes in the Percent Rule column.
- Once any needed adjustments are completed, select Finish. This will update the expense report with any changes to the meals and incidentals calculations.

Travel Allowance							
Adjustments							
Here you can declare any free meals received to reduce your daily allowance. You can also claim additional all	owances, for example if you stayed overnig	ht with friends or family. Days can be	excluded from your trip, for	example if you are on person	al leave. Always refer to your o	ompany policy guidelines.	
View: Adjustments 🛩 Show Filters							
DateLocation	Exclude Day	Breakfast Provided	Lunch Provided	Dinner Provided	Percent Rule	Allowance Limit (	Reimbursement Amount @
All Days Dates: 3					<b>v</b>		
Mon, 02/24/2025 Oak Ridge, UNITED STATES @				~	~	\$220.0	0 \$23.00
Tue, 02/25/2025 Oak Ridge, UNITED STATES @			<b>v</b>		~	\$220.0	0 \$49.00
Wed, 02/26/2025 Oak Ridge, UNITED STATES @					~	\$0.0	0 \$51.00
						Total: \$440.0	D Total: \$123.00
Back							Finish Cancel



• Add your expenses by selecting Add Expense. This will bring up a list of expense types to select from. *This job aid includes examples for Hotel Reservation only. Your expenses may vary.* 

ot Subm	itted   Report Number: JP1QC6					
REQUES Approved \$782.50	т					
eport Det	ails ❤ Print/Share ❤ Manage Receipts ❤ Tra	avel Allowance 🗸		•	View Available Re-	ceipts 🕕
Expe	ises		⊙ Add	Expense Edit Delete Copy Allocate	Combine Expenses Mo	we 🗸
0	Receipt↓† Payment Type↓†	Expense Type↓†	Vendor Details.↓↑	Date↓ <sup></sup>	Requested↓†	
	Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/26/2025	\$3.75	
0	Cash	Meals - per diem	Oak Ridge, Tennessee	02/26/2025	\$47.25	
Ο	Cash	Meals - per diem	Oak Ridge, Tennessee	02/25/2025	\$44.00	
0	Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/25/2025	\$5.00	
	Cash	Meats - per diem	Oak Ridge, Tennessee	02/24/2025	\$47.25	
Ο	Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/24/2025	\$3.75	
					\$151.00	

- o Under New Expense select the expense type. If you have Available Expenses, such as airfare charged on the company ghost card, select Available Expenses to add to your expense report.
- o For this example we will select Hotel under New Expense.





#### o Complete the Details section of the Hotel form and select Save Expense.

K $$ $$ v $$ is through the online booking tool or directly with the agency.
ig through the online booking tool or directly with the agency.
: Transaction Date * 🚱
02/26/2025
Vendor *
Hampton Inn & Suites
Payment Type * 🚱
Cash
Currency *
US, Dollar (USD) X 🗸
Lodging Nightly Rate Over GSA *
Hotel is at or below GSA rate X 🗙
0/50

o You will receive an alert to itemize your nightly hotel room rates. Select Yes.



o Select Recurrence from the drop down. If there are different room rates for different nights, be sure to select "Different Daily Amount" and enter the individual nightly rates in the Room Rate column. Select Save Itemization.

Details Itemization	s			
Amount \$250.00	Itemized \$250.0	0	Remaining \$0.00	
New Itemizatio	n			
Expense Type *				Required f
Hotel				×
Quick Tips     A valid personal on     Travelers are responded     A valid personal on     Travelers are responded     A valid by VRB0, etc.     Show Less Recurrence *	edit card saved to your profile is required insible for payment at the time of travel. is not allowed.	to reserve lodging through the online bo	oking tool or directly with the agency.	
Ouick Tips     A vaiid personal cn     Traviers are resp:     Airbeb, VRBO, etc.     Show Less Recurrence *      Different daily amoun     Nights: 2	edit card anond to your profile is required mission for payment at the time of travel. Is not allowed.	to reserve lodging through the online bo	oking tool or directly with the agency.	
<ul> <li>Avaid personal cr</li> <li>Avaid personal cr</li> <li>Travelers are resp</li> <li>Autrue, VRBO, etc.</li> <li>Show Less</li> <li>Recurrence * </li> <li>Different daily amout</li> <li>Mights: 2</li> <li>Date</li> </ul>	edd card saved to your profile is required maked for payment at the time of travel. Is not allowed.	to reserve lodging through the online bo	oking tool or directly with the agency.	Тах
Availa personal cr Availa personal cr Traviers are respond Autob (VBO), etc. Show Less Neternation (VBO), etc. Show Less Deternation (VBO), etc. Nights: 2 Date 02/24/2025	edit card taxed to your profile in required nable for payment at the time of travel. In not allowed.	to reserve lodging through the ordine loo Room Tax 25.00	oking tool or directly with the agency. Tax 2	Tax
Outick Tips A valid personal or Travelers are regard Autobe (VHID) etc. Show Less Different daily amoun Outputs 2 Date 02/24/2025 02/25/2025	edit card taxed to your profile in required matched for payment at the time of travel. In out allowed.	to reserve lodging through the ordine loo Room Tax 25.00 25.00	oking tool or directly with the agency. Tax 2	Там

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#### o Select Save Expense in the upper right-hand corner. (not shown in example)

02/26/20	25 Hampton Inn 8	Suites		
Details	Itemizations			
Amount		Itemized	Remaining	
\$250.0	00	\$250.00	\$0.00	
Itemi	zations	Funnes Tree It	Create Itemization Edit Delete C	
U	Date	Expense typet1	Requested	
	02/24/2025	Hotel	\$125.00	
	02/24/2025	Hotel Tax	\$25.00	
	02/25/2025	Hotel	\$75.00	
-	02/25/2025	Hotel Tay	\$25.00	2.2

• Continuing adding all your expenses. Select Submit Report when you are done.

Home / Exp	Home / Expense / Manage Expenses / Oak Ridge, TN 2/24/25-2/26/25									
Oak	Ridge, TN 2/24/25-	2/26/25 \$123.00			Submit Report Delete Report					
Not Subm	itted   Report Number: JP1QC6									
REQUES Approved \$782.50	т									
Report Det	ails 🗸 Print/Share 🗸 Manage Receipts 🗸	Travel Allowance 🗸			View Available Receipts 🗐					
Exper	ises		€ Add I	Expense Edit Delete Copy Allocate	Combine Expenses Move 🗸					
	Receipt↓↑ Payment Type↓↑	Expense Type↓↑	Vendor Details↓↑	Date↓ <sup>∓</sup>	Requested↓↑					
	Cash	Incidentals - per diem	Oak Ridge. Tennessee	02/26/2025	\$3.75					
	Cash	Meals - per diem	Oak Ridge. Tennessee	02/26/2025	\$47.25					
	Cash	Meals - per diem	Oak Ridge. Tennessee	02/25/2025	\$44.00					
	Cash	Incidentals - per diem	Oak Ridge. Tennessee	02/25/2025	\$5.00					
	Cash	Meals - per diem	Oak Ridge. Tennessee	02/24/2025	\$19.25 ***					
0	Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/24/2025	\$3.75 •••					
					\$123.00					

o The report totals will pop up. Select Submit Report.

Company Paymen	ts	
\$704.00		
Employee		
Employee Paymen	ts	
\$0.00		
Company		
Amount Total:	Due Employee:	Owed Company:
\$704.00	\$704.00	\$0.00
Approved Amount:	Total Paid By Company:	Total Owed By Employee:
\$704.00	\$704.00	\$0.00

o You will receive confirmation your report was submitted. Select Close. You are now done!

×

Report Status

#### Report Submitted

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#### Single Day Travel Allowance Itinerary:

Single day travel allowance itineraries are used most often when traveling locally for conferences or meetings without an overnight stay. Travel  $\leq$  12 hours is not eligible for per diem meals. Travel > 12 hours qualifies for 75% of the USGSA per diem rate.

The single day travel allowance itinerary used in Concur previously, is not available with the new travel allowance, but Concur plans to add it soon. In the meantime, follow the steps below.

Note: If unsure if travel time will exceed 12 hours, you may add per diem meals to the travel request and adjust the travel allowance itinerary in the expense report if needed.

#### One- or two-day travel without overnight:

- Travel Request: create a travel allowance itinerary for your travel dates (see page 2).
  - **One-day travel:** start and end date are the same date. If travel time is ≤ 12 hours, per diem meals and incidentals will not calculate.
  - **Two-day travel**: start and end dates are one day apart. Meals and incidentals will be 75% of the GSA rate for the location for each day.

#### • Expense Report:

- **One-day travel:** if travel time is > 12 hours and there is no entry in the expense report for meals and incidentals, add a travel allowance itinerary for the day. (Travel Allowance > Add Travel Allowance).
- **Two-day travel:** if travel time for both days is > 12 hours, no action is needed.
  - If travel time for both days is < 12 hours, delete the travel allowance itinerary. (Travel Allowance</li>
     > Delete Travel Allowance).
  - If only one day is > 12 hours, update the travel allowance itinerary start and end date (Travel Allowance > Edit Travel Allowance).

#### Extended Day Trips - More than two days without overnight:

- **Travel Request**: create a travel allowance itinerary for your travel dates (see page 2). Use the date range of your single travel days.
- **Expense Report:** adjust the carried-over travel allowance itinerary.
  - For travel days ≤ 12 hours, delete the travel allowance itinerary (Travel Allowance > Delete Travel Allowance) to remove per diem items.
  - For travel days > 12 hours, edit the travel allowance itinerary (Travel Allowance > Edit Travel Allowance) to calculate per diem meals.
    - Save the itinerary to update per diems for days > 12 hours.
    - Add additional travel allowance itineraries for any days > 12 hours travel time. (Travel Allowance > Add Travel Allowance).



## Travel Requests without expense report fully approved prior to 3/17:

#### **Create Expense Report from an Approved Request**

• From the Concur home screen, select Authorization Requests.

Concur Home V					
1 Carlos	No.50	The state	115100	1 Color	OF
11150	1 Proves				13
1121					J.
© Create	Authorization Requests	4 Available Expenses	Expense Reports	0 g8 Cash Advances	0
ORAU					
Company Notes					

- Find your approved travel request after your trip has ended.
- Click on the tile to open the travel request and select Create Expense Report.

•		
Requests View: Active Requ	uests 🗸	
Riverside CA 3/7-3/10 03/07/2025   7L4J	Greenville SC 2/26-3/2	A
\$1,444.00	\$1,292.00	
Ready to Book	Approved	

Home / Requests / Manage Requests / Greenville SC 2/26-3/2					
Alerts: 1					~
Greenville SC 2/26-3/2 \$ Approved   Request ID: 7.3X Request Details Y Print/Share Y Attachment: @ Y	51,292.00	Create Expense Report	Copy Request	Cancel Request	Close Request
TRIP 0 PNR: OBFHDN					
EXPECTED EXPENSES					
Expense type↓↑	Details J†		Date↓F	Amount↓†	Requested 1
Air Ticket	Washington (WAS) - Greenville (GSP) : Round Trip		02/26/2025	\$450.00	\$450.00
Meals - per diem	Greenville, South Carolina, UNITED STATES		02/26/2025	\$306.00	\$306.00
Hotel Reservation	Greenville, South Carolina		02/26/2025	\$536.00	\$536.00
					\$1,292.00

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#### Add Travel Allowance Itinerary

- To add <u>per diem meals and incidentals</u>, create a travel allowance itinerary before adding your expenses by navigating to Manage Travel Allowance > Add Travel Allowance.
- o *If you do not need meal and incidental per diems and/or lodging you do not need to create a travel allowance itinerary.*

Home / Expense / Manage Expenses / Greenville SC 2/26-3/2	
Greenville SC 2/26-3/2 \$0.00	Submit Report Delete Report
Not Submitted   Report Number: V9G701	
REQUEST	
Approved \$1,292.00	
Report Details V Print/Share V Manage Receipts V Travel Allowance V	View Available Receipts 🕃
Expenses Add Travel Allowance	O Add Expense         Edit         Delete         Copy         Allocate         Combine Expenses         Move ∨
	12
	No Expenses
	Add expenses to this report to submit for reimbursement.

- Enter travel allowance itinerary information:
  - Start Location | Start Time: enter the location and time travel begins.
  - Arrival Location: enter the city of lodging.
    - **NOTE:** enter the city you are staying in overnight, not the airport city.
    - o If you are not staying overnight, select the "Without overnight" checkbox.
    - End Location | End Time: enter the location and time travel ends.

**NOTE:** Single day travel allowance itinerary functionality is not yet available in the new travel allowance. See section named <u>Single Day Travel Allowance Itinerary on page 11</u> for more information.

**NOTE:** for **multiple overnight stays at different locations**, select "Add Destination" in blue. For **international travel or overnight flights**, select "Detailed Itinerary".

Select Next						
Travel Allowance						
Rinerary Technical Information			/			
						* Required
Itinerary Name *						
Greening 30 220 312		Centres ( )		- menter eveniger	0	
Start Location *		Start Date *		Start Time *		
O Washington, District of Columbia	~	02/26/2025	8	8:00 AM	0	
+ Add Destination						
Arrival Location *						
Greenville, South Carolina	·					
+ Add Destination						
		(				
Washington, District of Columbia	~	03/02/2025	8	6:00 PM	0	
						Next: Adjust your travel allowance Next: Cancel



Creating a Travel Request and Expense Report with Travel Allowance

- After selecting Next, the **Travel Allowance Adjustment** screen displays. The allowance limits for nightly lodging and meal and incidental per diem amounts display.
- The amount displayed in the Allowance Limit is 200% of the GSA hotel per diem rate for the arrival location. The Reimbursement Amount is the reimbursement rate for meals and incidentals for the location.

**Note:** Meal and incidental per diems are reduced to 75% of the reimbursement rate on first and last days of travel. Exclude any known provided meals or personal days from this screen

- **Exclude Day:** if the entire day is a personal travel day, select the check box in this column next to the personal travel day. This will zero out the amounts in the **Allowance Limit and Reimbursement Amount** columns.
- **Breakfast, Lunch or Dinner Provided:** check the box for the dates for known provided meals. **Note:** meals provided can be adjusted when the expense report is created.
- **Percent Rule:** this box should always be checked to automatically calculate the lodging allowable limit. Do not remove the checkboxes.

```
• Select Finish.
```

0

Travel Allowance							
Adjustments							
Here you can declare any tree meals received to reduce your daily allowance. You can a	siso claim additional allowances, for	example if you stayed overnight w	ith friends or family. Days ca	n be excluded from your trip, fr	or example if you are on personal leave.	Always refer to your company policy guidelines.	
Vev. Adjustments V Show Filters							
DateLocation	Exclude Day	Breakfast Provided	Lunch Provided	Dinner Provided	Percent Rule	Allowance Limit 😡	Reimbursement Amount @
All Days Dates: 5					<b>v</b>		
Wed, 02/26/2025 Greenville, UNITED STATES O						\$220.00	\$51.00
Thu, 02/27/2025 Greenville, UNITED STATES @						\$220.00	\$68.00
Fri, 02/28/2025 Greenville, UNITED STATES @						\$220.00	\$68.00
Sat, 03/01/2025 Greenville, UNITED STATES @						\$220.00	\$68.00
Sun, 03/02/2025 Greenville, UNITED STATES O						\$0.00	\$51.00
						Total: \$880.00	Total: \$306.00
Back							Finish Cancel

- After selecting Finish, allowable meals and incidental per diems for each day will populate in your expense report.
   NOTE: meals and incidentals now show on separate lines vs. combined into one meals-per diem line with the old travel allowance.
- Add your expenses by selecting Add Expense. This will bring up a list of expense types to select from. *This job aid includes examples for Hotel Reservation only. Your expenses may vary.*

Home / Exp	pense / Manage Expenses / Greenville SC 2/20	5-3/2				
Gree	enville SC 2/26-3/2	2 \$306.00			Submit Report	Jelete Repo
Not Subm	nitted   Report Number: KF8PHX					
REQUES Approved \$1,292.0	8 <b>T</b> 10					
Report Det	tails ❤ Print/Share ❤ Manage Receipts	✓ Travel Allowance ✓			View Available	e Receipts
Expe	nses		Add Expense		Combine Expenses	Move 🗸
	Receiptit Payment Typeit	Expense Type‡†	Vendor Details↓↑	Date↓ <sup>p</sup>	Requested↓↑	- î
	Cash	Incidentals - per diem	Greenville. South Carolina	03/02/2025	\$3.75	
	Cash	Meats - per diem	Greenville. South Carolina	03/02/2025	\$47.25	
	Cash	Meats - per diem	Greenville, South Carolina	03/01/2025	\$63.00	
	Cash	Incidentals - per diem	Greenville. South Carolina	03/01/2025	\$5.00	
	Cash	Incidentals - per diem	Greenville. South Carolina	02/28/2025	\$5.00	
	Cash	Meals - per diem	Greenville. South Carolina	02/28/2025	\$63.00	
	Cash	Meals - per diem	Greenville. South Carolina	02/27/2025	\$63.00	
	Cash	Incidentais - per diem	Greenville. South Carolina	02/27/2025	\$5.00	1
					\$306.00	-



- o Under New Expense select the expense type. If you have Available Expenses, such as airfare charged on the company ghost card, select Available Expenses to add to your expense report.
- o For this example we will select Hotel under New Expense.

Add Ex	pense to Report
Greenvill	e SC 2/26-3/2 \$306.00
New Exp	Available Expenses
Select a	n expense type for the new expense
Searc	th and the second se
Search b	y expense type, category, description
<b>∧</b> 0:	1. Travel Expenses
	Hotel
	Laundry
	Lodging-No Charge \$0 Only
∧ 0;	2. Transportation
	Airfare
	Airline Fees
	Use Airline Fees for agency fee, baggage, onboard wifi, etc.
	Parking

o Complete the Details section of the Hotel form and select Save Expense.

Dutails Itemizations			
			1 Provide Aug
Experted Sype *			and the state of the
Hotel			× •
Quick Tips     PLEASE NOTE: hotels over 200% of the GSA tate, will in     An Tamitad paid receipt is required.     Show Less	epulre additional document	tation and approval	
Outre Hange *	Ngto.	Transaction Date * 😡	
02/26/2025 - 03/03/2025	C 5	03/03/2025	e
Business Purpose *		Vertiler *	
Attend workshop		**DoubleTree Hotels	
Cry of Ladging *		Payment Tipe * 😡	
Greenville, South Carolina	× ~	Cash	
Array *		Cameroy*	
536.00		US, Dollar (USD)	×
		Langerg Signity Rate Over LLA *	
Travel Allowance		Hotel is at or below GSA rate	×
Request *			
02/26/2025, \$536.00 - Greenville SC 2/26-3/2	~		
Comment			0.9

o You will receive an alert to itemize your nightly hotel room rates. Select Yes.





Creating a Travel Request and Expense Report with Travel Allowance

Select Recurrence from the drop down. If there are different room rates for different nights, be sure to select
 "Different Daily Amount" and enter the individual nightly rates in the Room Rate column. Select Save Itemization.

etails Itemizations				
nount 536.00	Itemized \$536.00		Remaining \$0.00	
ew Itemization				* Required fiel
pense Type *				
otel				× ~
Quick Tips PLEASE NOTE: hc An Itemized paid r Show Less currence Gifterent daily amount Nights: 5	tels over 200% of the GSA rate, will require eccipt is required.	additional documentation and approval		v
Quick Tips PLEASE NOTE: hc An itemized paid r Show Less currence * Nighterent daily amount Nights: 5 Nate	tels over 200% of the GSA rate, will require eccipt is required.	additional documentation and approval	Tax 2	v Tax 3
Quick Tips PLEASE NOTE: he PLEASE NOTE: he An itemized paid r Show Less currence *  Nighte: 5 Nights: 5 Nate 12/26/2025	tels over 200% of the GSA rate, will require eccept is required.  Room Rate* 75.00	additional documentation and approval Room Tax 20.00	Tax 2	Tax 3
Quick Tips PLEASE NOTE: h An itemized paid r Show Less Currence *  Ifferent daily amount Nights: 5 Nate 2/26/2025 2/27/2025	tels over 200% of the GSA rate, will require ecceipt is required.  Room Rate*  75.00  75.00	additional documentation and approval       Room Tax       20.00       20.00	Tax 2	Tax 3
Quick Tips PLEASE NOTE: he An itemized paid r Show Less Currence * Nifferent daily amount	tels over 200% of the GSA rate, will require ecceipt is required.	Room Tax       20.00       20.00       20.00	Tax 2	Tax 3
Quick Tips     PLEASE NOTE: hc     An itemized paid r Show Less currence *     M     Itemized paid r     Show Less currence *     M     Nights: 5     Date     12/26/2025     12/27/2025     1301/2025	tels over 200% of the GSA rate, will require ecceipt is required.	Room Tax       20.00       25.00       26.00	Tax 2	Tax 3

o Attach receipt and select Save Expense in the upper right-hand corner.

Home / Exp	ense / Manage Expenses / Greenville SC 2/2	16-3/2 / Hotel			
Hote	l \$536.00				Save Expense Delete Expense Cancel
03/03/203	5 **DoubleTree Hotels				Hide Receipt
Details	Itemizations			Rece	eipt
Amount \$536.0	0	Itemized \$536.00	Remaining \$0.00		
Itemia	ations		Create Itemization Edit Delete Copy Ali	locate	
	Date 1%	Expense Type1	Requested 1		
	02/26/2025	Hotel	\$75.00		
0	02/26/2025	Hotel Tax	\$20.00		
	02/27/2025	Hotel	\$75.00		
0	02/27/2025	Hotel Tax	\$20.00		0
	02/28/2025	Hotel	\$100.00		Click to unload or drag and drop files to unload a new receipt.
	02/28/2025	Hotel Tax	\$25.00		Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff. 5ABI limit ner file
0	03/01/2025	Hotel	\$100.00		Add Receipt
0	03/01/2025	Hotel Tax	\$26.00		
0	03/02/2025	Hotel	\$75.00		
	03/02/2025	Hotel Tax	\$20.00		



### • Continuing adding all your expenses. Select Submit Report when you are done.

Gree	nville SC	2/26-3/2	\$842.00					Subm	Report	Delete	Report
Not Submi	tted   Report Numb	er: KF8PHX									
REQUES Approved \$1,292.00	r										
Report Det	ils 🗸 Print/Share 🗸	Manage Receipts ~	Travel Allowance 🗸						View Avail	lable Rec	;eipts 📃
Exper	ises					0	Add Expense Edit Delete Cop				•• ••
0	Receipt↓† Payme	nt Type⊥†		Expense Type‡†	Vendor Details []		Date1	Reque	ted∐†		~
0	Cash			Hotel	**DoubleTree Hotels Greenville, South Carolina		03/03/2025	\$	i36.00 emized		×
0	Cash			Incidentals - per diem	Greenville, South Carolina		03/02/2025		\$3.75		
0	Cash			Meals - per diem	Greenville, South Carolina		03/02/2025		47.25		
	Cash			Meals - per diem	Greenville, South Carolina		03/01/2025		63.00		
0	Cash			Incidentals - per diem	Greenville, South Carolina		03/01/2025		\$5.00		
0	Cash			Incidentals - per diem	Greenville, South Carolina		02/28/2025		\$5.00		
0	Cash			Meals - per diem	Greenville, South Carolina		02/28/2025		63.00		
0	Cash			Meals - per diem	Greenville, South Carolina		02/27/2025		63.00		
0	Cash			Incidentals - per diem	Greenville, South Carolina		02/27/2025		\$5.00		
0	Cash			Incidentals - per diem	Greenville, South Carolina		02/26/2025		\$3.75		
	Cash			Meals - per diem	Greenville, South Carolina		02/26/2025		47.25		
								5	42.00		

o A User Electronic Agreement will pop-up. Select Accept and Continue.

<ol> <li>By clicking on the 'Accept &amp; Submit' button, I certify that:</li> <li>This is a true and accurate accounting of expenses incurred to accomplish the stated purpose of the costs and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.</li> <li>All required receipt images have been attached to this report.</li> <li>I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.</li> <li>In the event of new nature of in anymet is received from another source for any portion of the expenses.</li> </ol>	User Electronic Agreement	)
<ol> <li>This is a true and accurate accounting of expenses incurred to accomplish the stated purpose of the costs and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.</li> <li>All required receipt images have been attached to this report.</li> <li>I have not received, nor will I receive, reimbursament from any other source(s) for the expenses claimed.</li> <li>In the event of over-nament or if anymotic is received from another source for any portion of the expenses.</li> </ol>	By clicking on the 'Accept & Submit' button, I certify that:	
claimed I assume responsibility for repaying in full for those expenses.	<ol> <li>This is a true and accurate accounting of expenses incurred to accomplish the stated purpose of the and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.</li> <li>All required receipt images have been attached to this report.</li> <li>I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claid. In the event of over-payment or if payment is received from another source for any portion of the exclaimed I assume responsibility for repaying in full for those expenses.</li> </ol>	costs med. penses

Report Totals

Company Payments \$842.00 Employee			
Employee Payme	nts		
<b>⊅0.00</b> Company			
Amount Total: \$842.00	Due Employee: \$842.00	Owed Company: \$0.00	
		Total Owed By Employee:	

o You will receive confirmation your report was submitted. Select Close. You are now done!

×

Report Status	×
Report Submitted	
Greenville SC 2/26-3/2 \$842.00	
	Close

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