



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
 - [ORAU Travel Center - For ORAU Research Participants](#)
- NPP Fellows: Contact NPPTravel@orau.org with any questions.
- ARL RAP Participants: Contact ARLFellowship@orau.org 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, hover your cursor over the “?”.

To complete a travel request, log into [Zintellect - Climb Higher](#), select **View Travel** on your participant dashboard, then select **Go to Concur**.

The screenshot shows the ORAU participant dashboard. At the top, there is a navigation bar with links for Dashboard, Opportunity Catalog, About, Help, and a Welcome message. Below this, there are tabs for My Offers and My Favorites. A prominent message reads: "Click here to access the Travel Dashboard and to access Concur" with a yellow arrow pointing to a "View Travel" button. The main content area displays an "Offer Accepted" for "Advanced Bearings for Oil-Free Compact Turbomachinery" with dates from 11/2/2020 to 11/1/2021. There are buttons for "Download Apt. Letter" and "Download Terms of Apt.". At the bottom, there is a "Complete Documents" button. The ORAU logo is visible in the top right corner of the dashboard area.



Participant Travel

1 Concur Login ID: 000 [redacted]z@orau.travel

2 Go to Concur [↗](#)

Request Report

Expense Report

Click here for
more information
about this trip

Enter Keyword

Previous 1 Next

Report Name	Start Date	End Date	Approved Expense	Approved Status	Actions
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 [redacted]	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	↗

10 1 to 3 of 3

Previous 1 Next

3 Concur Travel Dashboard [↗](#)

Concur Travel Allowance (Per Diem) Upgrade Creating a Travel Request and Expense Report with Travel Allowance

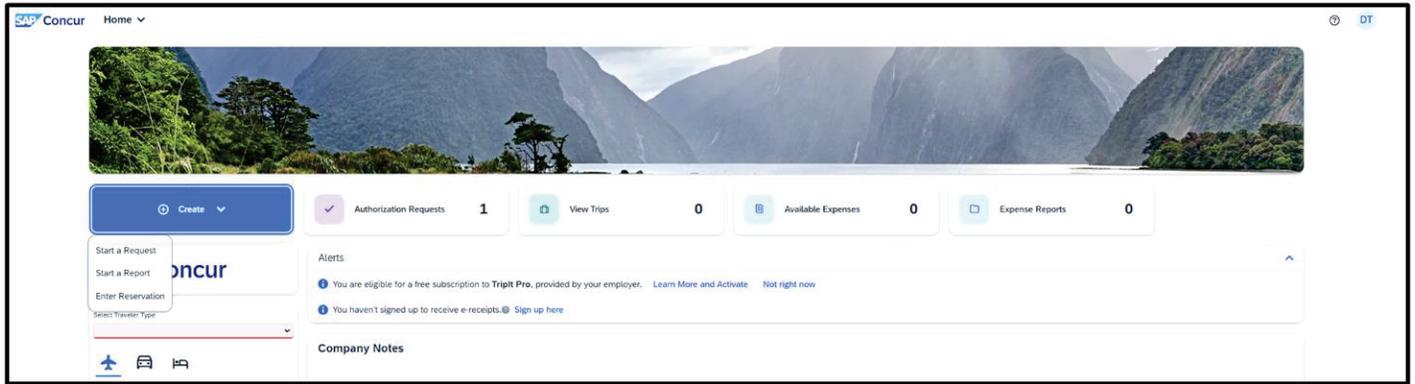
Effective Date: March 17th, 2025

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.

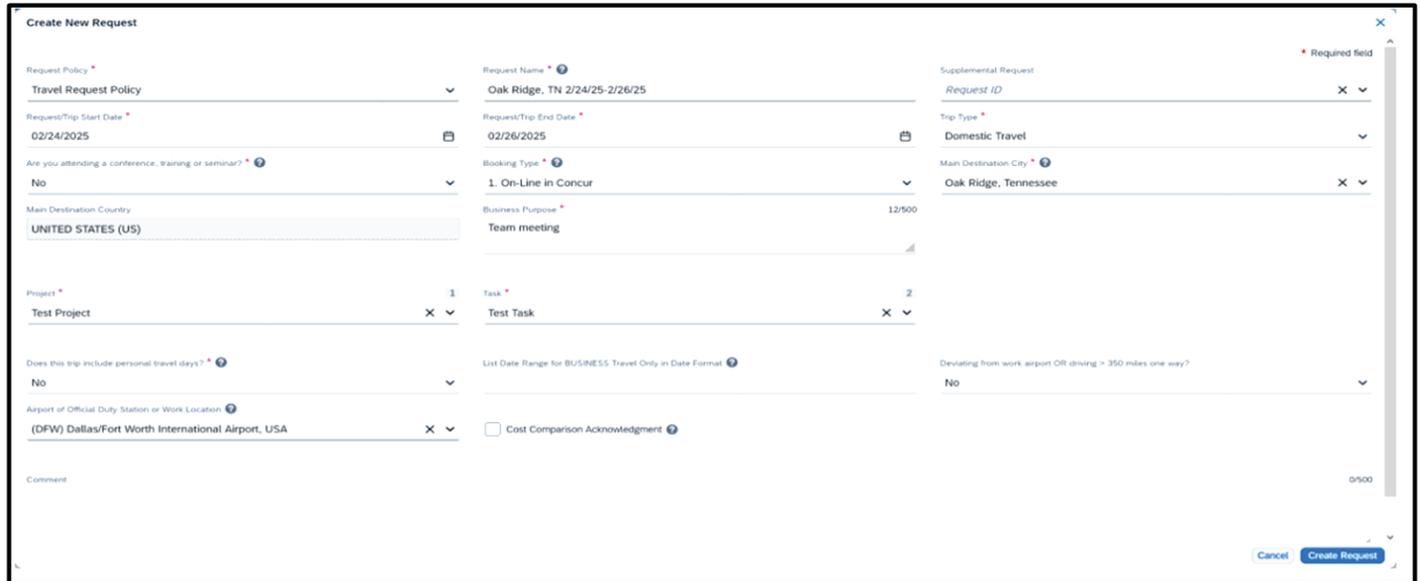
- New travel requests and expense reports created on or after March 17th – [begin on page 1.](#)
- Creating itineraries for approved travel requests without an expense report – [skip to page 12.](#)

Create New Travel Request

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



- Complete the travel request header and select Create Request.



Concur Travel Allowance (Per Diem) Upgrade

Creating a Travel Request and Expense Report with Travel Allowance

Add Travel Allowance Itinerary

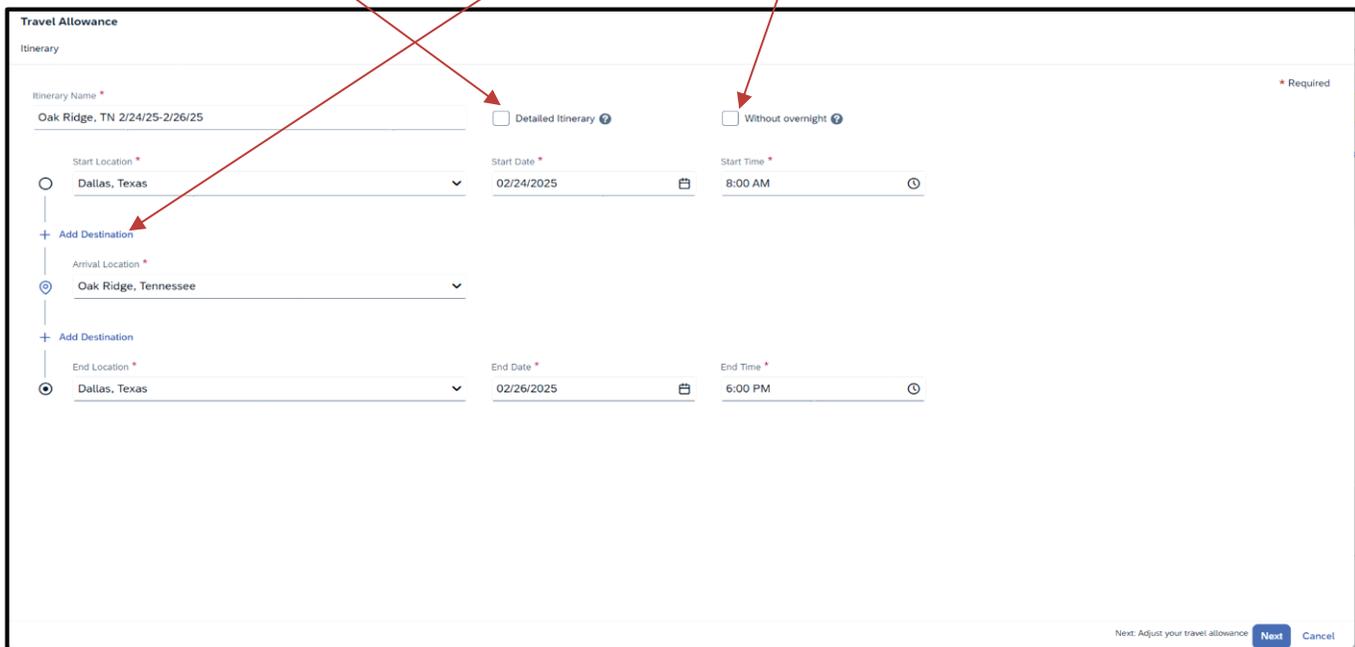
- To add per diem meals and incidentals, create a travel allowance itinerary before adding your expected expenses by navigating to Manage Travel Allowance > Add Travel Allowance.
- *If you do not need meal and incidental per diems and/or lodging you do not need to create a travel allowance itinerary.*



- 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 Single Day Travel Allowance Itinerary on page 11 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

Concur Travel Allowance (Per Diem) Upgrade

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. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

View: Adjustments ▾ Show Filters

Date/Location	Exclude Day	Breakfast Provided	Lunch Provided	Dinner Provided	Percent Rule	Allowance Limit	Reimbursement Amount
All Days Dates: 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Mon, 02/24/2025 Oak Ridge, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$220.00	\$51.00
Tue, 02/25/2025 Oak Ridge, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$220.00	\$49.00
Wed, 02/26/2025 Oak Ridge, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	\$51.00
Total:						\$440.00	\$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]*
- Select the down arrow to the right-hand side to open lines for meals and incidentals.

Home / Requests / Manage Requests / Oak Ridge, TN 2/24/25-2/26/25

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 ▾ Print/Share ▾ Attachments ▾ Manage Travel Allowance ▾

EXPECTED EXPENSES

Expense type	Details	Date	Amount	Requested	
<input type="checkbox"/> Travel Allowances	Oak Ridge, Tennessee	02/24/2025 - 02/26/2025	\$182.50	\$182.50	<input type="checkbox"/> <div style="border: 1px solid black; padding: 2px; display: inline-block;"> ▼ </div>
				\$182.50	

Concur Travel Allowance (Per Diem) Upgrade

Creating a Travel Request and Expense Report with Travel Allowance

- 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.*

Home / Requests / Manage Requests / Oak Ridge, TN 2/24/25-2/26/25

⚠ Alerts: 1

Oak Ridge, TN 2/24/25-2/26/25 \$182.50

Not Submitted | Request ID: 7KW9

[Request Details](#) | [Print/Share](#) | [Attachments](#) | [Manage Travel Allowance](#)

Submit Request
Copy Request
Delete Request

Add
Edit
Delete
Allocate

<input type="checkbox"/>	Expense type↑↓	Details↑↓	Date↑↓	Amount↑↓	Requested↑↓	
<input type="checkbox"/>	Travel Allowances	Oak Ridge, Tennessee	02/24/2025 - 02/26/2025	\$182.50	\$182.50	⬆
<input type="checkbox"/>	Meals - per diem	02/24/2025 - 02/26/2025 : 3 Days	02/24/2025	\$170.00	\$170.00	
<input type="checkbox"/>	Incidentals - per diem	02/24/2025 - 02/26/2025 : 3 Days	02/24/2025	\$12.50	\$12.50	
					\$182.50	

- Add air ticket

Home / Requests / Manage Requests / Oak Ridge, TN 2/24/25-2/26/25 / Air Ticket

←
→

Air Ticket \$350.00

Save
Delete
Cancel

📌 **Quick Tips** [Show Less](#)
 PLEASE NOTE: Estimate high as fares change often. If your actual fare is higher, additional approval will be needed, delaying ticketing.

Round Trip
One Way
Multi City

Outbound

From *

Dallas Ft Worth Intl (Airport - DFW), Dallas, Texas

Date * 02/24/2025 Departure time 10:00 AM

To *

McGhee Tyson (Airport - TYS), Knoxville, Tennessee

Depart at * 0/2000

Comment

Airport of Official Duty Station or Work Location

DFW

Return

Date * 02/26/2025 Departure time 01:00 PM

Depart at * 0/2000

Comment

Airport of Official Duty Station or Work Location

DFW

Amount * 350.00

Currency * US, Dollar

Save
Cancel

Concur Travel Allowance (Per Diem) Upgrade Creating a Travel Request and Expense Report with Travel Allowance

o Add Hotel Reservation

Home / Requests / Manage Requests / Oak Ridge, TN 2/24/25-2/26/25 / New Expense: Hotel Reservation

New Expense: Hotel Reservation

Save
Cancel

Quick Tips Show Less

- PLEASE NOTE: hotels over 200% of the GSA rate, will require additional documentation and approval.
- An itemized paid receipt is required.

Check-In * Required field

Date: At: City:

Location Preference / Address Reference Point *

Check-Out

Date: At:

Additional Comments

SEE ? Agency to reserve lodging when booking airfare

Amount * Currency *

Save
Cancel

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

Home / Requests / Manage Requests / Oak Ridge, TN 2/24/25-2/26/25

Alerts: 1

Oak Ridge, TN 2/24/25-2/26/25 \$782.50

Submit Request
Copy Request
Delete Request

Not Submitted | Request ID: 7KW9

Request Details | Print/Share | Attachments | Manage Travel Allowance

EXPECTED EXPENSES Add Edit Delete Allocate

<input type="checkbox"/>	Expense type	Details	Date	Amount	Requested
<input type="checkbox"/>	Air Ticket	Dallas (DFW) - Knoxville (TYS) : Round Trip	02/24/2025	\$350.00	\$350.00
<input type="checkbox"/>	Hotel Reservation	Oak Ridge, Tennessee	02/24/2025	\$250.00	\$250.00
<input type="checkbox"/>	Travel Allowances	Oak Ridge, Tennessee	02/24/2025 - 02/26/2025	\$182.50	\$182.50
					\$782.50

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

ORAU Request Traveler Agreement X

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 request 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

Concur Travel Allowance (Per Diem) Upgrade

Creating a Travel Request and Expense Report with Travel Allowance

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.

Expense type	Details	Date	Amount	Requested
Air Ticket	Dallas (DFW) - Knoxville (TVS) - Round Trip	02/24/2025	\$350.00	\$350.00
Hotel Reservation	Oak Ridge, Tennessee	02/24/2025	\$250.00	\$250.00
Travel Allowances	Oak Ridge, Tennessee	02/24/2025 - 02/26/2025	\$182.50	\$182.50
				\$782.50

- 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

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/26/2025	\$3.75
<input type="checkbox"/>	Cash	Meals - per diem	Oak Ridge, Tennessee	02/26/2025	\$47.25
<input type="checkbox"/>	Cash	Meals - per diem	Oak Ridge, Tennessee	02/25/2025	\$44.00
<input type="checkbox"/>	Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/25/2025	\$5.00
<input type="checkbox"/>	Cash	Meals - per diem	Oak Ridge, Tennessee	02/24/2025	\$47.25
<input type="checkbox"/>	Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/24/2025	\$3.75
					\$151.00

Concur Travel Allowance (Per Diem) Upgrade Creating a Travel Request and Expense Report with Travel Allowance

- Make any needed modifications and select Next

Travel Allowance

Itinerary

Itinerary Name * * Required
 Oak Ridge, TN 2/24/25-2/26/25 Detailed Itinerary Without overnight

Start Location * Start Date * Start Time *
 Dallas, Texas 02/24/2025 8:00 AM

+ Add Destination

Actual Location *
 Oak Ridge, Tennessee

+ Add Destination

End Location * End Date * End Time *
 Dallas, Texas 02/26/2025 6:00 PM

Next: Adjust your travel allowance Next Cancel

- From the Travel Allowances Adjustments screen, adjust for any meals provided or exclude personal days.
- **NOTE:** remember to never remove 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 allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

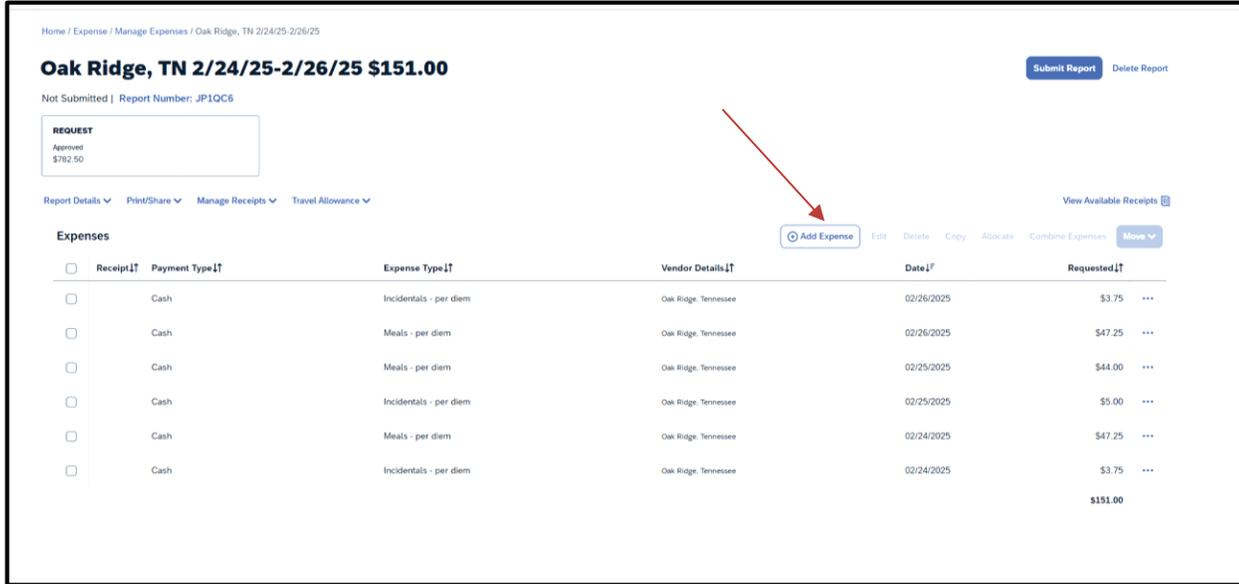
View: Adjustments Show Filters

Date/Location	Exclude Day	Breakfast Provided	Lunch Provided	Dinner Provided	Percent Rule	Allowance Limit	Reimbursement Amount
All Days Dates: 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Mon, 02/24/2025 Oak Ridge, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$220.00	\$23.00
Tue, 02/25/2025 Oak Ridge, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$220.00	\$49.00
Wed, 02/26/2025 Oak Ridge, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	\$51.00
Total:						\$440.00	\$123.00

Back Finish Cancel

Concur Travel Allowance (Per Diem) Upgrade Creating a Travel Request and Expense Report with 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 / Expense / Manage Expenses / Oak Ridge, TN 2/24/25-2/26/25

Oak Ridge, TN 2/24/25-2/26/25 \$151.00 Submit Report Delete Report

Not Submitted | Report Number: JP1OC6

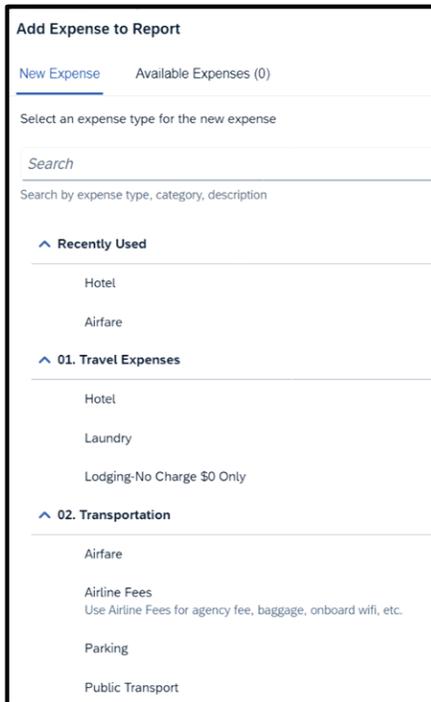
REQUEST
Approved
\$782.50

Report Details | Print/Share | Manage Receipts | Travel Allowance | View Available Receipts

Expenses Add Expense Edit Delete Copy Allocate Combine Expenses Move

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/26/2025	\$3.75 ...
<input type="checkbox"/>		Cash	Meals - per diem	Oak Ridge, Tennessee	02/26/2025	\$47.25 ...
<input type="checkbox"/>		Cash	Meals - per diem	Oak Ridge, Tennessee	02/25/2025	\$44.00 ...
<input type="checkbox"/>		Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/25/2025	\$5.00 ...
<input type="checkbox"/>		Cash	Meals - per diem	Oak Ridge, Tennessee	02/24/2025	\$47.25 ...
<input type="checkbox"/>		Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/24/2025	\$3.75 ...
						\$151.00

- 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.
- For this example we will select Hotel under New Expense.



Add Expense to Report

[New Expense](#) [Available Expenses \(0\)](#)

Select an expense type for the new expense

Search by expense type, category, description

Recently Used

- Hotel
- Airfare

01. Travel Expenses

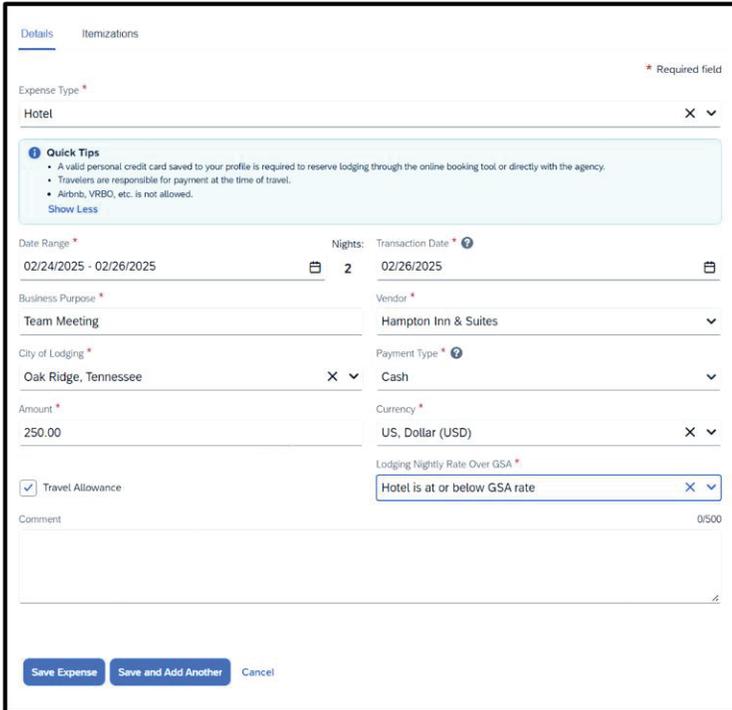
- Hotel
- Laundry
- Lodging-No Charge \$0 Only

02. Transportation

- Airfare
- Airline Fees
Use Airline Fees for agency fee, baggage, onboard wifi, etc.
- Parking
- Public Transport

Concur Travel Allowance (Per Diem) Upgrade Creating a Travel Request and Expense Report with Travel Allowance

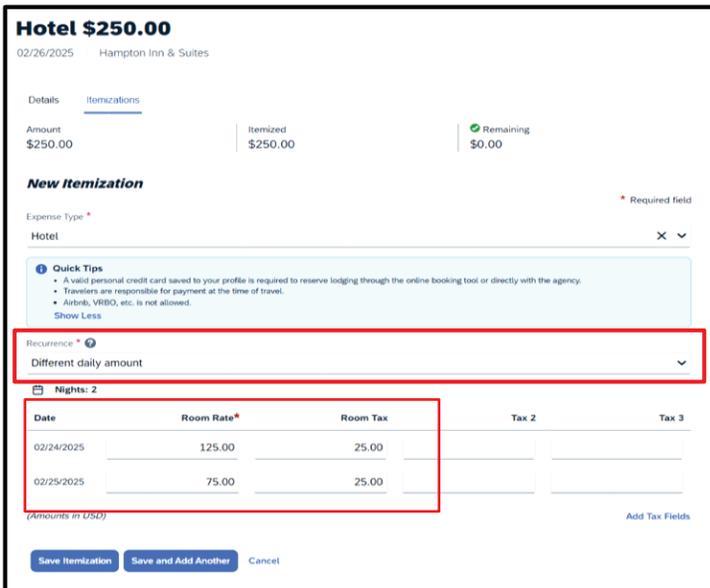
- o Complete the Details section of the Hotel form and select Save Expense.



- 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.



Date	Room Rate*	Room Tax	Tax 2	Tax 3
02/24/2025	125.00	25.00		
02/25/2025	75.00	25.00		

Concur Travel Allowance (Per Diem) Upgrade Creating a Travel Request and Expense Report with Travel Allowance

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

Hotel \$250.00
02/26/2025 Hampton Inn & Suites

Details Itemizations

Amount \$250.00 Itemized \$250.00 ✔ Remaining \$0.00

Itemizations Create Itemization Edit Delete Copy Allocate

<input type="checkbox"/>	Date↑	Expense Type↑	Requested↑	
<input type="checkbox"/>	02/24/2025	Hotel	\$125.00	...
<input type="checkbox"/>	02/24/2025	Hotel Tax	\$25.00	...
<input type="checkbox"/>	02/25/2025	Hotel	\$75.00	...
<input type="checkbox"/>	02/25/2025	Hotel Tax	\$25.00	...

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

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 Submitted | Report Number: JP1QC6

REQUEST
Approved
\$782.50

Report Details Print/Share Manage Receipts Travel Allowance View Available Receipts

Expenses Add Expense Edit Delete Copy Allocate Combine Expenses Move

<input type="checkbox"/>	Receipt↑	Payment Type↑	Expense Type↑	Vendor Details↑	Date↑	Requested↑	
<input type="checkbox"/>		Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/26/2025	\$3.75	...
<input type="checkbox"/>		Cash	Meals - per diem	Oak Ridge, Tennessee	02/26/2025	\$47.25	...
<input type="checkbox"/>		Cash	Meals - per diem	Oak Ridge, Tennessee	02/25/2025	\$44.00	...
<input type="checkbox"/>		Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/25/2025	\$5.00	...
<input type="checkbox"/>		Cash	Meals - per diem	Oak Ridge, Tennessee	02/24/2025	\$19.25	...
<input type="checkbox"/>		Cash	Incidentals - per diem	Oak Ridge, Tennessee	02/24/2025	\$3.75	...
						\$123.00	

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

Report Totals ×

Company Payments
\$704.00
Employee

Employee Payments
\$0.00
Company

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

Cancel Submit report

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

Report Status ×

✔ Report Submitted



Concur Travel Allowance (Per Diem) Upgrade Creating a Travel Request and Expense Report with Travel Allowance

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 \leq 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 \leq 12 hours, delete the travel allowance itinerary. (Travel Allowance $>$ 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:

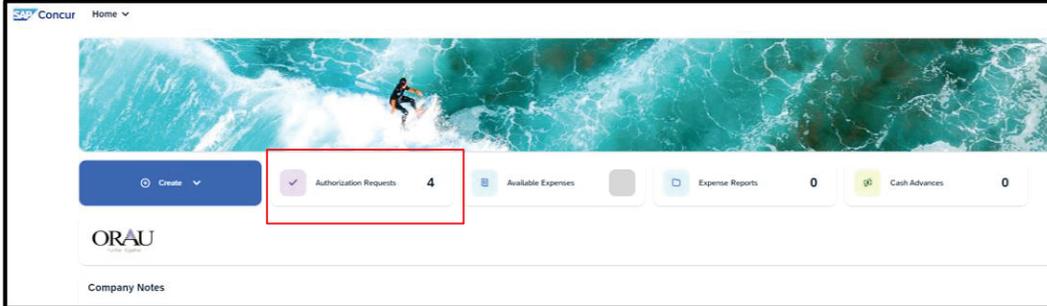
- **Travel Request:** create a travel allowance itinerary for your travel dates (see page 2). Use the date range of your single travel days.
- **Expense Report:** adjust the carried-over travel allowance itinerary.
 - For travel days \leq 12 hours, delete the travel allowance itinerary (Travel Allowance $>$ 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).

Concur Travel Allowance (Per Diem) Upgrade
Creating a Travel Request and Expense Report with Travel Allowance

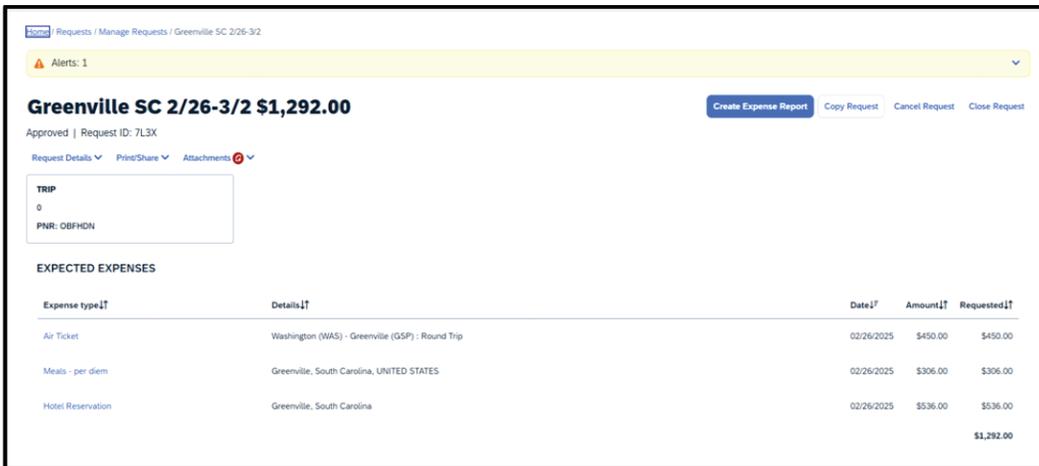
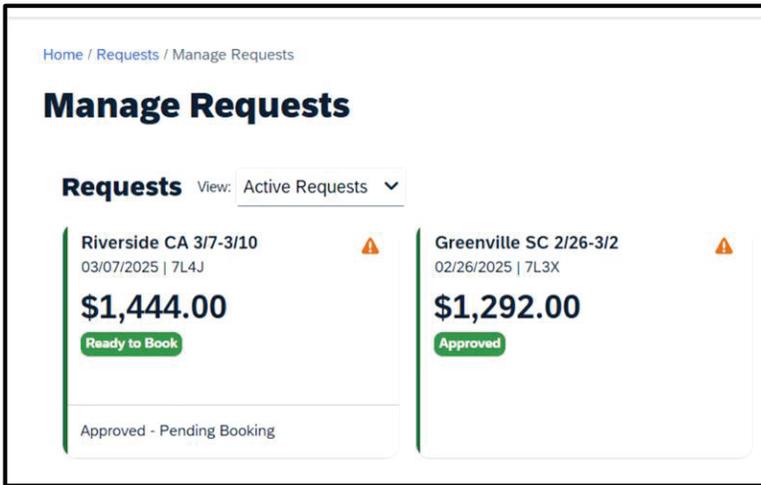
Travel Requests without expense report fully approved prior to 3/17:

Create Expense Report from an Approved Request

- From the Concur home screen, select Authorization Requests.



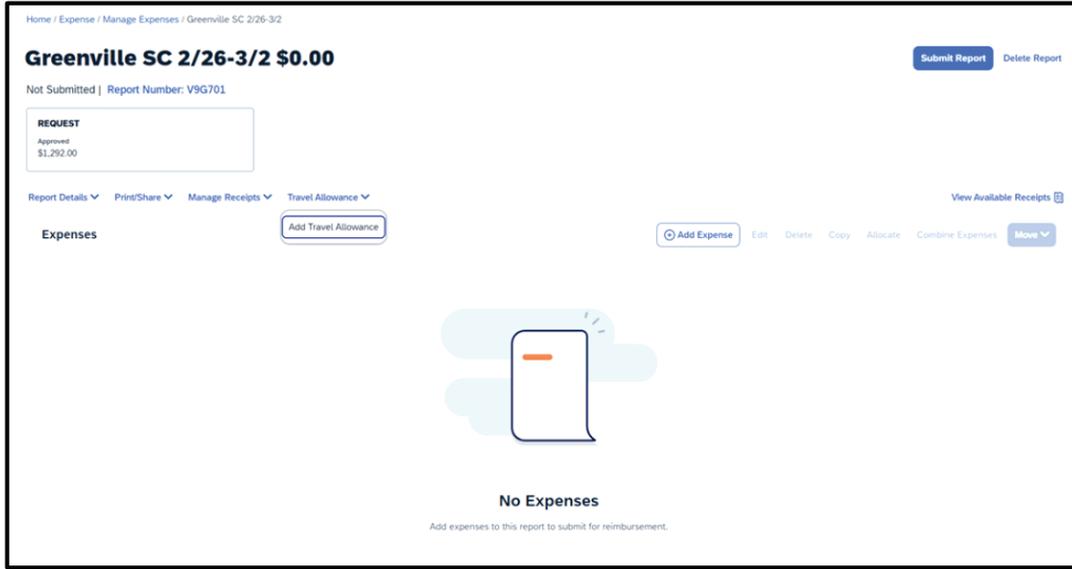
- Find your approved travel request after your trip has ended.
- Click on the tile to open the travel request and select Create Expense Report.



Concur Travel Allowance (Per Diem) Upgrade
Creating a Travel Request and Expense Report with Travel Allowance

Add Travel Allowance Itinerary

- To add per diem meals and incidentals, create a travel allowance itinerary before adding your 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.



- 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 Single Day Travel Allowance Itinerary on page 11 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



Concur Travel Allowance (Per Diem) Upgrade 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.



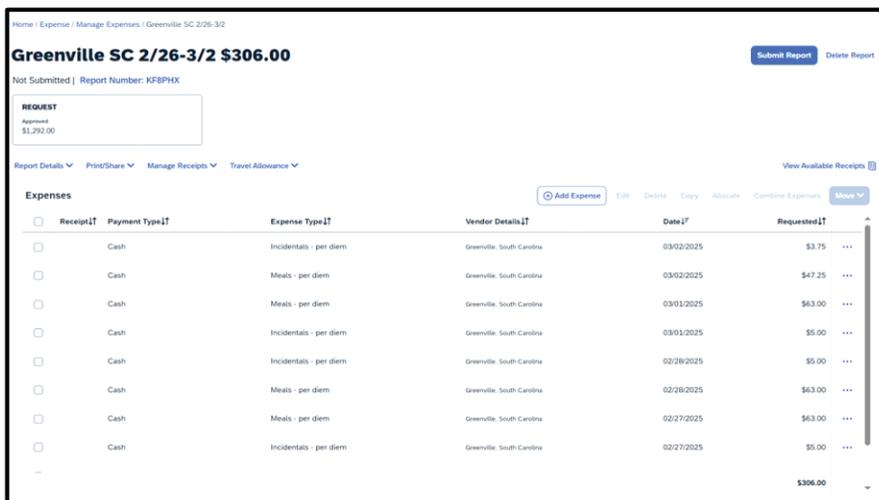
Travel Allowance Adjustment

Here you can declare any fees received to reduce your daily allowance. You can also claim additional allowances, for example if you stayed overnight with friends or family. Days can be excluded from your trip, for example if you are on personal leave. Always refer to your company policy guidelines.

View: Adjustments Show Filters

Date/Location	Exclude Day	Breakfast Provided	Lunch Provided	Dinner Provided	Percent Rule	Allowance Limit	Reimbursement Amount
All Days Dates: 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Wed, 02/26/2025 Greenville, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$220.00	\$51.00
Thu, 02/27/2025 Greenville, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$220.00	\$68.00
Fri, 02/28/2025 Greenville, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$220.00	\$68.00
Sat, 03/01/2025 Greenville, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$220.00	\$68.00
Sun, 03/02/2025 Greenville, UNITED STATES	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$0.00	\$51.00
Total:						\$880.00	\$306.00

- 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 / Expense / Manage Expenses / Greenville SC 2/26-3/2

Greenville SC 2/26-3/2 \$306.00

Submit Report Delete Report

Not Submitted | Report Number: KF8PHX

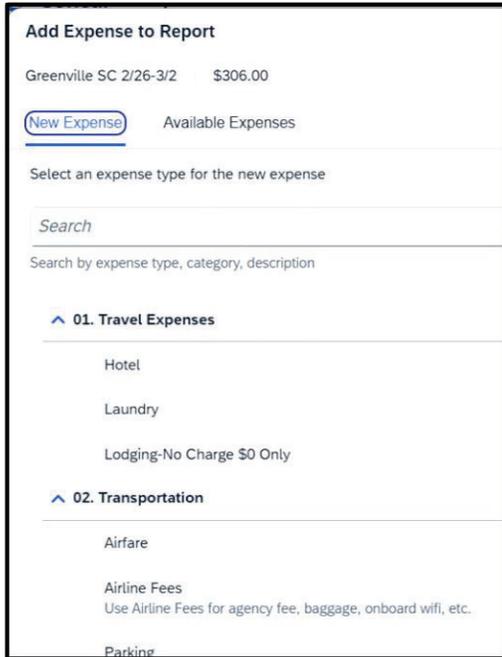
REQUEST
Approved
\$1,292.00

Report Details Print/Share Manage Receipts Travel Allowance View Available Receipts

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Cash	Incidentals - per diem	Greenville, South Carolina	03/02/2025	\$3.75
<input type="checkbox"/>	Cash	Meals - per diem	Greenville, South Carolina	03/02/2025	\$47.25
<input type="checkbox"/>	Cash	Meals - per diem	Greenville, South Carolina	03/01/2025	\$63.00
<input type="checkbox"/>	Cash	Incidentals - per diem	Greenville, South Carolina	03/01/2025	\$5.00
<input type="checkbox"/>	Cash	Incidentals - per diem	Greenville, South Carolina	02/28/2025	\$5.00
<input type="checkbox"/>	Cash	Meals - per diem	Greenville, South Carolina	02/28/2025	\$63.00
<input type="checkbox"/>	Cash	Meals - per diem	Greenville, South Carolina	02/27/2025	\$63.00
<input type="checkbox"/>	Cash	Incidentals - per diem	Greenville, South Carolina	02/27/2025	\$5.00
					\$306.00

Concur Travel Allowance (Per Diem) Upgrade Creating a Travel Request and Expense Report with Travel Allowance

- 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 Expense to Report

Greenville SC 2/26-3/2 \$306.00

New Expense Available Expenses

Select an expense type for the new expense

Search

Search by expense type, category, description

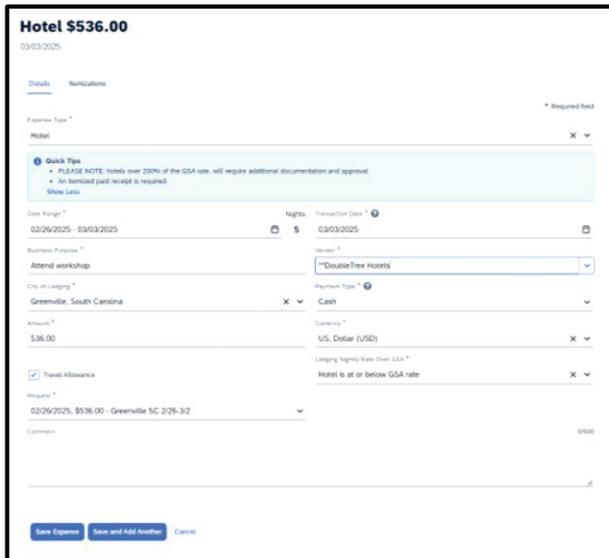
01. Travel Expenses

- Hotel
- Laundry
- Lodging-No Charge \$0 Only

02. 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.



Hotel \$536.00
03/03/2025

Details | Itemizations

Expense Type * **Hotel**

Quick Tips
PLEASE NOTE: hotels over 200% of the GSA rate, will require additional documentation and approval.
An itemized post receipt is required.
Show Less

Date Range * 02/26/2025 - 03/03/2025 Nights: 7 Transaction Date * 03/03/2025

Business Purpose * **Attend workshop** Agency * **Double Tree Hotels**

City of Lodging * **Greenville, South Carolina** Payment Type * **Cash**

Amount * **\$36.00** Currency * **US, Dollar (USD)**

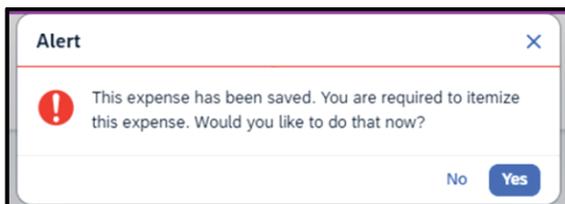
Travel Allowance Lodging Nights Rate Over GSA * **Hotel is at or below GSA rate**

Receipt * 02/26/2025, \$336.00 - Greenville SC 2/26-3/2

Comments

Save Expense **Save and Add Another** **Cancel**

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



Alert

! This expense has been saved. You are required to itemize this expense. Would you like to do that now?

No **Yes**

Concur Travel Allowance (Per Diem) Upgrade Creating a Travel Request and Expense Report with Travel Allowance

- 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.

Hotel \$536.00

03/03/2025 **DoubleTree Hotels

Details Itemizations

Amount \$536.00 Itemized \$536.00 ✔ Remaining \$0.00

New Itemization * Required field

Expense Type * ✕ ▾

Hotel

Quick Tips

- PLEASE NOTE: hotels over 200% of the GSA rate, will require additional documentation and approval
- An Itemized paid receipt is required.

[Show Less](#)

Recurrence * ? ▾

Different daily amount

Nights: 5

Date	Room Rate*	Room Tax	Tax 2	Tax 3
02/26/2025	75.00	20.00		
02/27/2025	75.00	20.00		
02/28/2025	100.00	25.00		
03/01/2025	100.00	26.00		
03/02/2025	75.00	20.00		

(Amounts in USD) [Add Tax Fields](#)

Save Itemization
Save and Add Another
Cancel

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

Home / Expense / Manage Expenses / Greenville SC 2126-32 / Hotel

Hotel \$536.00

03/03/2025 **DoubleTree Hotels

Save Expense
Delete Expense
Cancel

[Hide Receipt](#)

Details Itemizations

Amount \$536.00 Itemized \$536.00 ✔ Remaining \$0.00

Itemizations

Date	Expense Type	Requested	
<input type="checkbox"/>	02/26/2025	Hotel	\$75.00
<input type="checkbox"/>	02/26/2025	Hotel Tax	\$20.00
<input type="checkbox"/>	02/27/2025	Hotel	\$75.00
<input type="checkbox"/>	02/27/2025	Hotel Tax	\$20.00
<input type="checkbox"/>	02/28/2025	Hotel	\$100.00
<input type="checkbox"/>	02/28/2025	Hotel Tax	\$25.00
<input type="checkbox"/>	03/01/2025	Hotel	\$100.00
<input type="checkbox"/>	03/01/2025	Hotel Tax	\$26.00
<input type="checkbox"/>	03/02/2025	Hotel	\$75.00
<input type="checkbox"/>	03/02/2025	Hotel Tax	\$20.00

Receipt



Click to upload or drag and drop files to upload a new receipt.
Valid file types for upload are .png, .jpg, .jpeg, .pdf, .tif or .tiff.
5MB limit per file.

Add Receipt

Job Aid_New TA
Version Date: 03/07/2025
Page 16 of 17

Concur Travel Allowance (Per Diem) Upgrade Creating a Travel Request and Expense Report with Travel Allowance

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

Greenville SC 2/26-3/2 \$842.00 Submit Report Delete Report

Not Submitted | Report Number: KF8PHX

REQUEST
Approved
\$1,292.00

Report Details | Print/Share | Manage Receipts | Travel Allowance View Available Receipts

Expenses Add Expense Edit Delete Copy Allocate Combine Expenses Move

<input type="checkbox"/>	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		Cash	Hotel	**DoubleTree Hotels Greenville, South Carolina	03/03/2025	\$536.00 Itemized
<input type="checkbox"/>		Cash	Incidentals - per diem	Greenville, South Carolina	03/02/2025	\$3.75
<input type="checkbox"/>		Cash	Meals - per diem	Greenville, South Carolina	03/02/2025	\$47.25
<input type="checkbox"/>		Cash	Meals - per diem	Greenville, South Carolina	03/01/2025	\$63.00
<input type="checkbox"/>		Cash	Incidentals - per diem	Greenville, South Carolina	03/01/2025	\$5.00
<input type="checkbox"/>		Cash	Incidentals - per diem	Greenville, South Carolina	02/28/2025	\$5.00
<input type="checkbox"/>		Cash	Meals - per diem	Greenville, South Carolina	02/28/2025	\$63.00
<input type="checkbox"/>		Cash	Meals - per diem	Greenville, South Carolina	02/27/2025	\$63.00
<input type="checkbox"/>		Cash	Incidentals - per diem	Greenville, South Carolina	02/27/2025	\$5.00
<input type="checkbox"/>		Cash	Incidentals - per diem	Greenville, South Carolina	02/26/2025	\$3.75
<input type="checkbox"/>		Cash	Meals - per diem	Greenville, South Carolina	02/26/2025	\$47.25
						\$842.00

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

User Electronic Agreement X

By clicking on the 'Accept & Submit' button, I certify that:

1. 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.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of over-payment or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying in full for those expenses.

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

Report Totals X

Company Payments
\$842.00
Employee

Employee Payments
\$0.00
Company

Amount Total: \$842.00	Due Employee: \$842.00	Owed Company: \$0.00
Requested Amount: \$842.00	Total Paid By Company: \$842.00	Total Owed By Employee: \$0.00

Cancel Submit Report

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

Report Status X

✔ Report Submitted

Greenville SC 2/26-3/2 \$842.00

Close