Create an Itinerary for Per Diem

CLAIMING PER DIEM utilizes two separate instructional guides – Create an Itinerary for Per Diem and Enter Per Diem for Meals.

Situation: To claim per diem for meal expense, an itinerary of the trip must be entered as a foundation to the daily per diem calculation. Note: The University does not allow the use of per diem for lodging – it is for meals only.

Step One: Create an Itinerary

- Open the expense report on which you will be claiming per diem for your meals
- Click the Details button. Under Travel Allowances, select Available Itineraries. (Concur uses the word Travel Allowances to mean “per diem”.)
- Look at the screen. Is there an itinerary showing in either the top or bottom part of the screen? If yes, is one of them the itinerary that pertains to this trip?
  - If it is showing in the top part, it is attached and ready to be used in this expense report.
  - If it is in the bottom part, highlight the name of the itinerary related to this trip and click Assign.
The detailed itinerary will move to the top part of the screen.

If the screen is blank, click the Create New Itinerary at the top of the box.

- A pop up box will appear. This is where you will enter your itinerary details – by date and location. **NOTE:** The itinerary should be based on the city where business was conducted or where you “laid your head” that night (not necessarily the same as the airport into which you flew).
- All fields marked by a red left margin are required fields, starting with the Itinerary Name at the top left of the screen.
- In the section on the right side of the screen, enter the “Depart From City”. (Start typing and then choose it from the drop down list)
• Enter the date you departed. (Using the calendar icon will ensure that it is formatted properly)
• Enter the time departed to the nearest quarter hour – such as 7:15 am.
• Enter the Arrive In City. **DO NOT INCLUDE** AIRPORTS VISITED TO CHANGE PLANES.
• Enter the date you arrived. **In most cases this is the same day as you departed, unless the trip was international.**
• Enter the time arrived to the nearest quarter hour.

• SAVE (at bottom of page). The detail will move to the left side of the screen.

• You now MUST enter your return trip, in the same manner on the right side of the screen, starting with the date you are leaving to return to the original location.

• Click SAVE. The detail will move to the left side of the screen.

• You can add additional line items, for other cities visited during the trip, by clicking the Add Stop on the left and filling in the details. **REMEMBER:** One line represents one date. To travel to a location is one line. To travel back is a second line.
• Itinerary is now complete.

To proceed with calculating Per Diem, go to the Instruction Sheet **Enter Per Diem for Meals.**