

## Overview

From the University Financial Policy on per diems:

- If authorized by the school or unit, you can request per diem payments for meals and lodging expenses.
- The university will reimburse expenses up to the federal per diem rate.
- Per diems will not be paid in advance of a trip.

This Guide covers the process of adding per diem requests to an expense report. Specifically, it provides instructions on how to create an itinerary and how to enter any required adjustments to the per diem request.

## Adding Per Diem Requests to Expense Reports

### Step 1: Create an Itinerary

1. Create a new expense report, or select an open report.
2. Click the **Details** link, and then select **New Itinerary**. The Travel Allowances window appears.
3. The **Itinerary Name** field is pre-populated with the name of the expense report, but you can change it if desired.
4. Select the type of per diem request from the **Selection** field. Your options are:
  - Meals Only
  - Meals and Lodging
  - Lodging Only
5. Under New Itinerary Stop, enter the following information:
  - Name of the **Departure City**
  - **Date** and **Time** you left the departure city.
  - Name of the **Arrival City**
  - **Date** and **Time** you arrived at the destination.
6. Click **Save**.

**Travel Allowances For Report: Per Diem for NY Trip**

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

**Itinerary Info**

Itinerary Name: Per Diem for NY Trip  
 Selection: USGSA - Meals & Lodging

Buttons: Add Stop, Delete Rows

	Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found			

**New Itinerary Stop**

Departure City: Cambridge, Massachusetts  
 Date: 05/08/2016 Time: 7:30 AM  
 Arrival City: New York, New York  
 Date: 05/08/2016 Time: 9:15 AM

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

7. Enter the information for your return trip:
  - The **Departure City** and **Arrival City** fields are pre-populated, but can be changed, if necessary.
  - Enter the **Date** and **Time** you left the departure city.
  - Enter the **Date** and **Time** you arrived at the destination.
8. Click **Save**.

9. Click **Next**. The Available Itineraries screen appears.

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
<b>Itinerary: Per Diem for NY Trip</b>				
Cambridge, Massachusetts	05/08/2016 07:30 AM	New York, New York	05/08/2016 09:15 AM	NEW YORK COUNTY, U...
New York, New York	05/10/2016 08:00 PM	Cambridge, Massachusetts	05/10/2016 10:25 PM	SUFFOLK COUNTY, US...

10. Confirm the itinerary and then click **Next**. The Expenses and Adjustments screen appears.

**Step 2: Enter Adjustments and Create Expenses**

The Expenses and Adjustments screen displays each day of the trip as a separate row. You can make adjustments to the amount of per diem requested for each day.

- In each row, select the meals that were provided for you for that day. If you select a meal(s), the amount in the **Allowance** column will be reduced automatically.
  - To eliminate an entire day's per diem request, select the **Exclude** checkbox at the far left of the row for that day.
  - Per University Policy, the first and last days of a trip are only eligible for a maximum of 75 percent of the total per diem rate.
- When you have completed entering your adjustments, click **Create Expenses**.

Exclude	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	05/08/2016 New York, New York	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$291.50
<input type="checkbox"/>	05/09/2016 New York, New York	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$309.00
<input type="checkbox"/>	05/10/2016 New York, New York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.50

The per diem requests for each day are added to the expense report.

**NOTE:** If you selected **Meals and Lodging** as the type of per diem request, the expenses are separated into two expense types: **Per Diem Meals and Incidentals** and **Daily Allowance (Lodging)**.

Date	Expense Type	Amount	Requested
05/10/2016	Per Diem Meals & Incidentals New York, New York	\$55.50	\$55.50
05/09/2016	Per Diem Meals & Incidentals New York, New York	\$39.00	\$39.00
05/09/2016	Daily Allowance (Lodging) New York, New York	\$270.00	\$270.00
05/08/2016	Per Diem Meals & Incidentals New York, New York	\$21.50	\$21.50
05/08/2016	Daily Allowance (Lodging) New York, New York	\$270.00	\$270.00

### Resources

#### Quick Reference Guides and Online Tutorials

Quick Reference Guides provide step-by-step instructions on a number of common tasks in Concur, and online tutorials present a video walk-through of how to perform various tasks and procedures within the system. Both the Guides and online tutorials are available at: [travel.harvard.edu/concur-training](http://travel.harvard.edu/concur-training)

#### Concur Support

24 hour support is available through the Concur Support Desk at 866-793-4040. You can also access the Concur Support Portal within the system by clicking the **Help** menu, and then selecting **Contact Support**.