Create a Travel Allowance

All Reports for completed trips should include a Travel Allowance. The Travel Allowance defines the traveler’s time in travel status, applies the MI&E allowance to their Report, and determines the allowable lodging rate. The latter two purposes are why a Travel Allowance is required for all trips with lodging and/or meal expenses.

The allowable rate for the first day of travel is based on the GSA listed rate for the city where the traveler lodged. The allowance for the last day is based on the rate for the last city the traveler lodged. (R05.02.060(11)(a))

If no travel commenced, a Travel Allowance is not entered. For example, Reports to reconcile expenses from a cancelled trip or accidental card charges. Do not enter a Travel Allowance if the traveler was not in travel status.

Important: The Travel Allowance is not automatically prompted when the user creates a Report

1. Change the answer to “Claim Travel Allowance” at the bottom of the Report Header
   a. Answering “Yes, I want to claim Travel Allowance” initiates the Travel Allowance

   ![Claim Travel Allowance](image)
   
   Next: Create report and add itinerary details for your travel allowances

   Cancel  Next

   b. If the Report is already created, assign a Travel Allowance from Details>Travel Allowance: New Itinerary

   ![Travel Allowance](image)

2. In Create New Itinerary, enter the outbound and return itinerary information (start and end locations, dates, and times for each)
   a. Click Save after entering each leg
   b. Use the time traveler departed from or returned to their home/duty station
   c. If trip includes personal time, enter the business-only itinerary from the cost comparison
   d. Anytime flights cross date lines, the layovers are excluded unless the traveler stopped and lodged there for the night
Note: Including personal days in the Travel Allowance results in inaccurate calculations on allowable per diem. Including layovers/intermediate stops may also result in inaccurate per diem calculations.

For example, in the following screenshots, the actual itinerary includes an extended stay at the business location and a layover in Anchorage on the return. The itinerary entered reflects the business-only travel dates and excludes layover stops.
3. Once the itinerary is complete, click Next

**Hot Tip**: Selecting Import Itinerary provides some available trip itineraries. If the correct itinerary is available and assigned, this negates the need to manually enter each leg.
4. Verify the itinerary is correct and click Next

5. In Expenses & Adjustments, review M&IE allowances and click Create Expenses to assign the Travel Allowance to the Report
   a. Concur calculates the business location GSA rate and displays the daily allowable M&IE in Expenses & Adjustments
   b. Users can exclude provided meals, full days, or all per diem by checking the associated boxes
   c. The Allowance column provides total daily M&IE after deducting provided meals or excluded days
6. “Daily Per Diem” based on the Travel Allowance generates as expenses on the Report

<table>
<thead>
<tr>
<th>Receipt</th>
<th>Payment Type</th>
<th>Expense Type</th>
<th>Vendor Details</th>
<th>Date</th>
<th>Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Daily Per Diem</td>
<td>Seattle, Washington</td>
<td>10/29/2022</td>
<td>$98.25</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Daily Per Diem</td>
<td>Seattle, Washington</td>
<td>10/25/2022</td>
<td>$70.00</td>
</tr>
</tbody>
</table>

7. Access the Travel Allowance from the Travel Allowance drop-down menu to Edit or Unassign the information
   a. Only unsubmitted Reports are changeable
   b. Click Update Expenses on the Expenses & Adjustments tab to recalculate M&IE allowances
   c. The “Daily Per Diem” expense is not editable under Expenses

Troubleshoot

Problem: The Travel Allowance is alerting that the itinerary already exists.

Solution: The itinerary is already entered (usually from another Report) and listed under Travel Allowances: Available Itineraries. Assigning the existing itinerary will resolve the error alerts.

Under Available Itineraries, select the appropriate filter option from the drop-down menu. Select the itinerary, assign it to the Report, and edit if needed.