



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

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

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.

Travel Allowances For Report: Slavik, J 10/20-10/25/23 SE

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Slavik, J 10/20-10/25/23 SE Selection: USGSA

Buttons: Add Stop, Delete Rows, Import Itinerary

<input type="checkbox"/>	Departure City ^{1a}	Arrival City	Arrival Rate Location
No Itinerary Rows Found			

New Itinerary Stop Enter Outbound Itinerary

Departure City: Fairbanks, Alaska

Date: 10/20/2023 Time: 8:00 AM

Arrival City: Seattle, Washington

Date: 10/20/2023 Time: 10:00 AM

Save

Travel Allowances For Report: Slavik, J 10/20-10/25/23 SE

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Slavik, J 10/20-10/25/23 SE Selection: USGSA

Buttons: Add Stop, Delete Rows, Import Itinerary

<input type="checkbox"/>	Departure City ^{1a}	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Fairbanks, Alaska 10/20/2023 08:00 AM	Seattle, Washington 10/20/2023 10:00 AM	KING COUNTY, US...

New Itinerary Stop

Enter Return Itinerary

Departure City: Seattle, Washington

Date: 10/25/2023 Time: 12:00 PM

Arrival City: Fairbanks, Alaska

Date: 10/25/2023 Time: 2:00 PM

Save



3. Once the itinerary is complete, click Next

Travel Allowances For Report: Slavik, J 10/20-10/25/23 SE

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Slavik, J 10/20-10/25/23 SE Selection: USGSA

Buttons: Add Stop, Delete Rows, Import Itinerary

<input type="checkbox"/>	Departure City†	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Fairbanks, Alaska 10/20/2023 08:00 AM	Seattle, Washington 10/20/2023 10:00 AM	KING COUNTY, US-...
<input type="checkbox"/>	Seattle, Washington 10/25/2023 12:00 PM	Fairbanks, Alaska 10/25/2023 02:00 PM	FAIRBANKS, US-AK, ...

New Itinerary Stop

Departure City: Fairbanks, Alaska

Date: [] Time: []

Arrival City: []

Date: [] Time: []

Save

Go to Single Day Itineraries Next >> Cancel

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.

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name: Slavik, J 10/20-10/25/23 SE Selection: USGSA

Buttons: Add Stop, Delete Rows, Import Itinerary

Select trips and charges to use to create this itinerary

<input type="checkbox"/>	Description	Start Date†	End Date
<input checked="" type="checkbox"/>	Trip from Fairbanks to Anchorage (ESSAKG)	10/20/2023 08:1...	10/25/2023 05:4...
<input type="checkbox"/>	Noble House	04/01/2024 11:5...	04/06/2024 11:5...

Import Cancel



4. Verify the itinerary is correct and click Next

Travel Allowances For Report: Slavik, J 10/20-10/25/23 SE

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Assigned Itineraries

Edit Unassign

Departure City	Date and Time†	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Slavik, J 10/20-10/25/23 SE				
Fairbanks, Alaska	10/20/2023 08:00 AM	Seattle, Washington	10/20/2023 10:00 AM	KING COUNTY, US-WA, US
Seattle, Washington	10/25/2023 12:00 PM	Fairbanks, Alaska	10/25/2023 02:00 PM	FAIRBANKS, US-AK, US

Available Itineraries

Current Itineraries

Departure City	Date and Time†	Arrival City	Date and Time	Arrival Rate Location
No Available Itineraries Found				

<< Previous **Next >>**

5. In Expenses & Adjustments, review M&IE allowances and click Create Expenses to assign the Travel Allowance to the Report
- Concur calculates the business location GSA rate and displays the daily allowable M&IE in Expenses & Adjustments
 - Users can exclude provided meals, full days, or all per diem by checking the associated boxes
 - The Allowance column provides total daily M&IE after deducting provided meals or excluded days

Travel Allowances For Report: Slavik, J 10/20-10/25/23 SE

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from to

Exclude All <input type="checkbox"/>	Date/Location†	Meals Rate	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input checked="" type="checkbox"/>	10/20/2023 Seattle, Washin...	\$59.25	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
<input type="checkbox"/>	10/21/2023 Seattle, Washin...	\$79.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$79.00
<input type="checkbox"/>	10/22/2023 Seattle, Washin...	\$79.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$61.00
<input type="checkbox"/>	10/23/2023 Seattle, Washin...	\$79.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$59.00
<input type="checkbox"/>	10/24/2023 Seattle, Washin...	\$79.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$59.00
<input type="checkbox"/>	10/25/2023 Seattle, Washin...	\$59.25	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.25

<< Previous **Create Expenses** Cancel



6. “Daily Per Diem” based on the Travel Allowance generates as expenses on the Report

<input type="checkbox"/>	Receipt ↑	Payment Type ↑	Expense Type ↑	Vendor Details ↑	Date ↓	Requested ↑
<input type="checkbox"/>		Out-of-Pocket	Daily Per Diem	Seattle, Washington	10/25/2023	\$59.25 Allocated
<input type="checkbox"/>		Out-of-Pocket	Daily Per Diem	Seattle, Washington	10/24/2023	\$59.00 Allocated
<input type="checkbox"/>		Out-of-Pocket	Daily Per Diem	Seattle, Washington	10/23/2023	\$59.00 Allocated
<input type="checkbox"/>		Out-of-Pocket	Daily Per Diem	Seattle, Washington	10/22/2023	\$61.00 Allocated
<input type="checkbox"/>		Out-of-Pocket	Daily Per Diem	Seattle, Washington	10/21/2023	\$79.00 Allocated

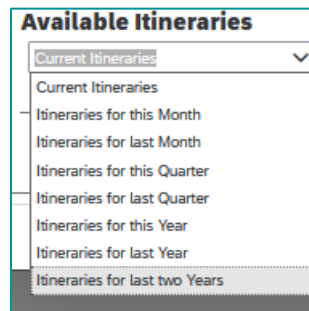
7. Access the Travel Allowance from the Travel Allowance drop-down menu to Edit or Unassign the information
 - a. Only unsubmitted Reports are changeable
 - b. Click Update Expenses on the Expenses & Adjustments tab to recalculate M&IE allowances
 - c. The “Daily Per Diem” expense is not editable under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





Available Itineraries

Itineraries for last Year ▼ Delete Assign

Departure City	Date and Time† ⁵	Arrival City	Date and Time	Arrival Rate Location
⊖ Itinerary: Lasinski, J SEA 5/22-27/22				
Fairbanks, Alaska	05/22/2022 09:00 AM	Seattle, Washington	05/22/2022 02:00 PM	KING COUNTY, US-WA, US
Seattle, Washington	05/27/2022 06:00 AM	Fairbanks, Alaska	05/27/2022 12:00 PM	FAIRBANKS, US-AK, US

Assigned Itineraries

Edit Unassign

Departure City	Date and Time† ⁵	Arrival City	Date and Time	Arrival Rate Location
⊖ Itinerary: Slavik, J 10/20-10/25/23 SE				
Fairbanks, Alaska	10/20/2023 08:00 AM	Seattle, Washington	10/20/2023 10:00 AM	KING COUNTY, US-WA, US
Seattle, Washington	10/25/2023 12:00 PM	Fairbanks, Alaska	10/25/2023 02:00 PM	FAIRBANKS, US-AK, US