

# EMPLOYEE Meal Per Diem Guide

## Adding Meals & Incidentals

(for travel beginning 1/1/2024)

**REQUEST: A Request has been created and you are now adding the meal per diem**

1. Add the expense type:

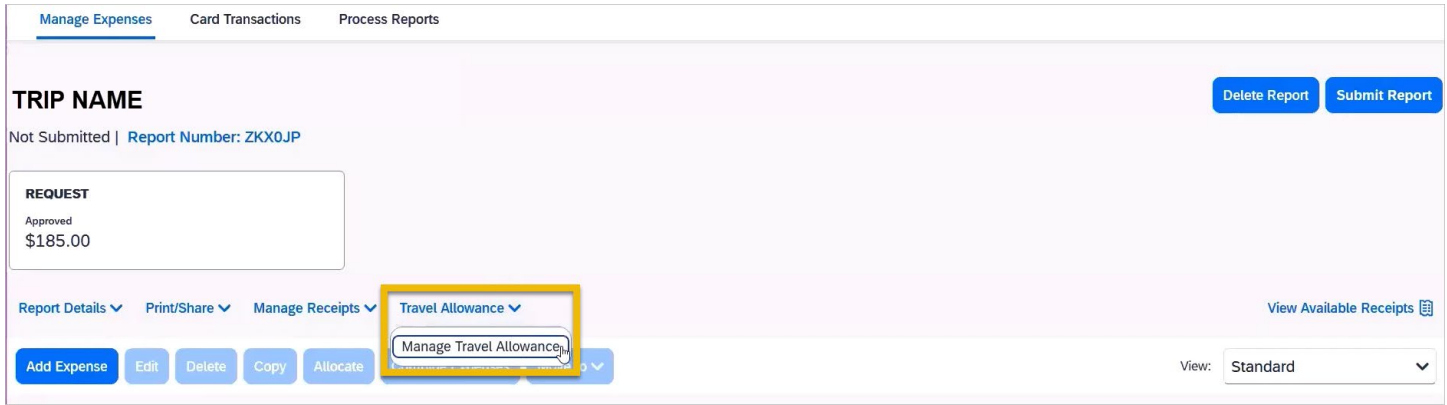
The screenshot shows a dialog box titled "Add expected expenses and/or travel plans". It contains a search bar and a list of expense categories. The categories are: 01. Travel Expenses (Hotel Reservation, Incidentals), 02. Personal Car Mileage, 03. Transportation (Air Ticket, Car Rental, Ground Transportation, Parking/Tolls, Railway Ticket), 04a. Meal & Incidentals Per Diem (highlighted), 04b. Meals - Domestic- (Travel prior to 1-1-24), and 05. Hospitality (Hospitality).

2. Enter reduction (if applicable). Allowance will calculate upon clicking Save.

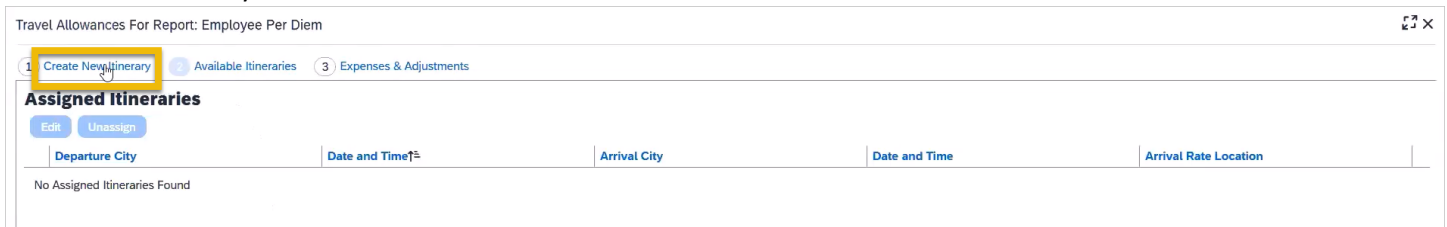
The screenshot shows the SAP Concur "Requests" form. The "Requests" dropdown menu is highlighted. The form includes fields for "TRIP NAME", "11/08/2023", "Allocate", "Travel Start Date" (11/08/2023), "Travel End Date" (11/13/2023), "Destination" (Sacramento, California), "Reduction Amount" (0), "Amount - Will automatically calculate when you hit save.", "Currency" (US, Dollar), and "Comments To/From Approvers/Processors". A callout bubble points to the "Reduction Amount" field with the text: "Use this field if your department is limiting coverage of Meals".

**EXPENSE REPORT: Meals are added by creating a Travel Allowance. Once the Expense Report is created, start with the steps below to add the meal per diem. Do not add meals from the “Add Expense” list**

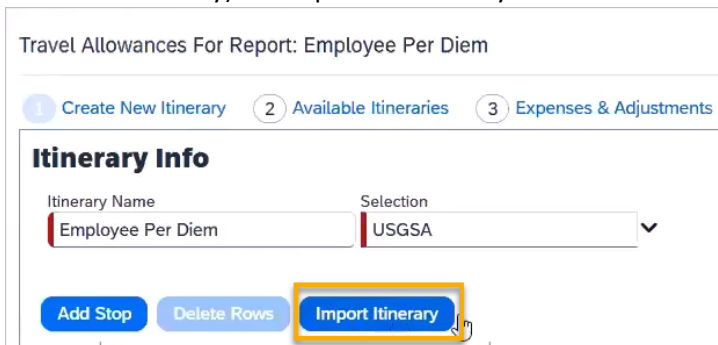
1. Travel Allowance > Manage Travel Allowance



2. Create New Itinerary



3. If you booked IN CONCUR, you can import your itinerary (if you booked outside of Concur, skip to Step 5 to manually create an itinerary). To import an itinerary from a Concur booking:



4. You may now skip ahead to Step 8.

5. If you booked outside of Concur, you must manually create an Itinerary. Add and save each leg of the trip:

Travel Allowances For Report: Employee Per Diem

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

### Itinerary Info

Itinerary Name: Employee Per Diem Selection: USGSA

Buttons: Add Stop, Delete Rows, Import Itinerary

Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found		

#### New Itinerary Stop

Departure City:

Date:  Time:

Arrival City:

Date:  Time:

6. All legs of the trip should now be listed:

Travel Allowances For Report: Employee Per Diem

1 Edit Itinerary 2 Available Itineraries 3 Expenses & Adjustments

### Itinerary Info

Itinerary Name: Employee Per Diem Selection: USGSA

Buttons: Add Stop, Delete Rows, Import Itinerary

Departure City	Arrival City	Arrival Rate Location
Sacramento, California 10/02/2023 08:00 AM	Long Beach, California 10/02/2023 09:30 AM	LOS ANGELES COUNTY, US-CA, US
Long Beach, California 10/06/2023 09:00 AM	Sacramento, California 10/06/2023 10:00 AM	SACRAMENTO COUNTY, US-CA, US

#### New Itinerary Stop

Departure City: Sacramento, California

Date:  Time:

Arrival City:

Date:  Time:

7. After clicking Next, your "Available Itineraries" will be listed along with the rate location being used by each. This is automatically determined by the system. Click Next.

Travel Allowances For Report: Employee Per Diem

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

### Assigned Itineraries

Buttons: Edit, Unassign

Departure City	Date and Time	Arrival City	Date and Time	Arrival Rate Location
Itinerary: Employee Per Diem				
Sacramento, California	10/02/2023 08:00 AM	Long Beach, California	10/02/2023 09:30 AM	LOS ANGELES COUNTY, US-CA, US
Long Beach, California	10/06/2023 09:00 AM	Sacramento, California	10/06/2023 10:00 AM	SACRAMENTO COUNTY, US-CA, US

8. The “Expenses & Adjustments” screen is used to exclude allowance for meals provided and personal travel days:

Travel Allowances For Report: Employee Per Diem

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Show dates from  to

Exclude   All <input type="checkbox"/>	Date/Location <sup>†</sup>	Meals Rate	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	10/02/2023 Long Beach, California	\$55.50	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$21.50
<input type="checkbox"/>	10/03/2023 Long Beach, California	\$74.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$5.00
<input type="checkbox"/>	10/04/2023 Long Beach, California	\$74.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$74.00
<input checked="" type="checkbox"/>	10/05/2023 Long Beach, California	\$74.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$0.00
<input type="checkbox"/>	10/06/2023 Long Beach, California	\$55.50	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$55.50

**To exclude meals provided by the conference/event, check the box and the allowance will be reduced by just that meal.**

**Rate total reduced to 75% for first and last day of travel**

**All meals were provided on this day, so the allowance has been reduced to only the Incidentals amount.**

**To exclude a personal travel day, check the box and the allowance changes to \$0**

9. A summary of your meal & incidentals:

Manage Expenses Card Transactions Process Reports

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

Add Expense Edit Delete Copy Allocate Combine Expenses Move to View: Standard

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/06/2023	\$55.50
<input type="checkbox"/>	Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/04/2023	\$74.00
<input type="checkbox"/>	Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/03/2023	\$5.00
<input type="checkbox"/>	Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/02/2023	\$21.50
					<b>\$156.00</b>

10. If you purchased all meals using cash or personal cards, you are finished.

11. If you purchased any meals using the Concur Travel Card, please proceed to step 12.

12. Click “Add Expense”

Manage Expenses Card Transactions Process Reports

**REQUEST**  
Approved  
\$185.00

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

Add Expense Edit Delete Copy Allocate Combine Expenses Move to View: Standard

Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>	Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/06/2023	\$55.50
<input type="checkbox"/>	Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/04/2023	\$74.00
<input type="checkbox"/>	Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/03/2023	\$5.00
<input type="checkbox"/>	Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/02/2023	\$21.50
					<b>\$156.00</b>

13. Select the appropriate Travel Card expense(s) from the Available Expenses:

The screenshot shows a window titled 'Available Expenses' with a '+ Create New Expense' button. Below is a table of expenses:

<input type="checkbox"/>	Payme... ↓↑	Expen... ↓↑	Expen... ↓↑	Vendor... ↓↑	Date ↓↑	Amount ↓↑
<input checked="" type="checkbox"/>	*CSU-USBank-CBCP	Corporate Card	Meals & Incidentals	TST* DESCHUTE S BREWERY PO Portland, Oregon	08/09/2023	\$46.00
<input type="checkbox"/>	*CSU-USBank-CBCP	Corporate Card	Meals Charged on Campus Issued Card	MARRIOTT 33709 PORTLAN Portland,	08/08/2023	\$22.00

Buttons: Close, Add To Report

14. In the next screen, click on the added expense.

The screenshot shows the 'Manage Expenses' screen with tabs for 'Manage Expenses', 'Card Transactions', and 'Process Reports'. Below are action buttons: Add Expense, Edit, Delete, Copy, Allocate, Combine Expenses, Move to. A 'View: Standard' dropdown is on the right. The main table lists expenses:

<input type="checkbox"/>	Alerts ↓↑	Receipt ↓↑	Payment Type ↓↑	Expense Type ↓↑	Vendor Details ↓↑	Date ↓↑	Requested ↓↑
<input type="checkbox"/>			Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/06/2023	\$55.50
<input type="checkbox"/>			Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/04/2023	\$74.00
<input type="checkbox"/>			Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/03/2023	\$5.00
<input type="checkbox"/>			Out of Pocket	Meals/Incidentals - Location Based	Long Beach, California	10/02/2023	\$21.50
<input type="checkbox"/>			*CSU-USBank-CBCP	Meals & Incidentals	TST* DESCHUTES BREWERY PO Portland, Oregon	08/09/2023	\$46.00
							<b>\$202.00</b>

15. Change the Expense Type to “Meals Charged on Campus Issued Card”

The screenshot shows the 'Details' screen for an expense. The 'Expense Type' dropdown is highlighted with a yellow box and arrow, showing 'Meals Charged on Campus Issued Card'. Other fields include:

- Transaction Date: 08/09/2023
- Payment Type: \*CSU-USBank-CBCP
- Amount: 46.00
- Currency: US, Dollar (USD)
- Request: 10/01/2023, \$185.00 - Employee Per Diem
- Personal Expense (do not reimburse):

16. Continue to do this for each Travel Card meal expense for the trip. Concur will deduct the meals charged on campus issued card from the Meal Per Diem total. No receipts are required.