

POLY TRAVEL.

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WINTER 2024

CSU Travel Policy UPDATES

1. Significant policy changes have been made to help simplify the expense report process:
 - a. **NEW Domestic Location-Based Meal Per Diem for Employees and NEW Domestic Flat Rate Per Diem for Non-Employees (Guests and Students)**
 - b. Receipts required for purchases of \$75+.
 - c. Travelers must pay back the University and attach Cashier's receipt to expense report prior to submitting for approval when an amount is owed.
 - d. AVP/Dean approval required for expense reports submitted 60+ days after travel end date.

New, for 2024 the updated CSU Travel Policy is introducing domestic meal per diems.

Starting on January 1, all meals and incidentals for domestic travel will be covered by meal per diems that range from \$59 - \$79. The exact amount of the per diem is determined by the location of travel and is based on the [US Office of Allowances](#).

The rates will be automatically entered when a trip is scheduled and expensed in Concur. This new policy will not require the traveler to provide receipts for meals when expensing.

For traveling non-employees including prospective employees, students and volunteers, the per diem will be a fixed \$59 a day.

For more information on Poly Travel visit afd.calpoly.edu/travel/

TRAINING DATES: Travelers and traveler supporters are encouraged to attend one of the per diem trainings offered by the Poly Travel Office this month. These trainings will provide information on:

1. How to add meal per diem to a Concur Request
2. How to add Travel Allowance for meal per diem to a Concur Expense Report
3. How to use the new travel preauthorization and cash advance (1A) form for student only travel

DATES and ZOOM Links:

Friday, January 19th 9:00am -10:00am <https://calpoly.zoom.us/j/82604979143>

Wednesday, January 24th 2:00pm-3:00pm <https://calpoly.zoom.us/j/89258334036>

Thursday, February 1st 11:00am- 12:00pm <https://calpoly.zoom.us/j/81760520164>

2. 2023 Travel Expense Reports Due January 31, 2024.

To streamline the transition to the new policy (see above), all outstanding 2023 travel expense reports must be submitted, reviewed and approved by Jan. 31, 2024.

3. New Look for Concur

Concur has a new look in 2024! It is called SAP Fiori Horizon visual theme.

Watch the Demo videos for the Desktop Concur and the Mobile App versions of the theme

- [Demo of SAP Horizon Fiori](#)
- [Mobile Demo](#)

4. Surface Travel used in Lieu of Flying

A traveler may use surface transportation in lieu of flying. Costs shall not exceed the cost of airfare, based on economy or coach fare. A cost comparison and advanced approval by the traveler's manager are required on the Concur Request.

5. Use of Contracted Supplier

University business travelers are asked to be diligent about the cost effectiveness of travel related expenses. Travelers are expected to purchase travel services, when available, from CSU, campus, or State of California contracted suppliers.

The CSU, campus, or State of California contracted suppliers deliver competitive value in the range of services required by University travelers. Such suppliers could include airlines, car rental agencies, hotels, travel agencies, and online booking providers. Although it might be possible to obtain a lower cost from other sources, use of CSU, campus, or State of California contracted suppliers should, on average and over time, reduce the University's overall travel costs and provide the best value to the traveler.

RESOURCES:

Visit the Poly Travel website for PowerPoint and video resources to use at your departmental trainings.

<https://afd.calpoly.edu/travel/resources/>

- **Travel Updates Presentation – PowerPoint** (Dec 6th) or Video presentation
 - Use slides for policy updates including per diem, \$75 receipt requirement, credit card pick up location, Horizon Fiori (Concur new look), 15 passenger vans, paying back the university process update, upcoming Concur approver training and credit card violations and corrections procedures

- **[Resources/Request](#) – Concur Request User Guide 2024**
 - One guide for Request and includes screenshots with the new Horizon Fiori look.
 - Includes adding meal per diems

- **[Resources/Expense Report](#) – Concur User Expense Guide 2024**
 - One guide for Expense Report and includes screenshots with new Horizon Fiori look.
 - Includes adding Travel Allowance (Travel Itinerary) for meal per diems
 - **Importing Travel Itinerary** – can use when booking airfare with Concur
 - **Entering Travel Itinerary** – must use when booking airfare outside of Concur

Links to maximum travel per diem allowances for various type of travel by location:

- For Continental US travel, rates set annually by [General Services Administration](#);
- For Alaska, Hawaii, or the US Possessions travel, rates annually set by [Department of Defense](#) (Per Diem, Travel and Transportation Allowance Committee (PDTATAC))
- For International travel, rates set monthly by [Department of State](#)

Contact Us:

Concur General Support

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Concur Expense Report Support

Payment Services
Find Your P2P Payment Services Tech:
<https://afd.calpoly.edu/procure-to-pay/how-to-pay/>