

CSUMB EMPLOYEE

Meal Per Diem Guide

Adding Meals & Incidentals

(for travel after 1/1/2024)

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

1. Add the expense type:

Add expected expenses and/or travel plans

Search for an expense type

- 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**
- 04b. Meals - Domestic- (Travel prior to 1-1-24)
- 05. Hospitality
 - Hospitality

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

SAP Concur Requests

Manage Requests Process Requests

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

Comments To/From Approvers/Processors

Save Cancel

Use this field if your department is limiting coverage of Meals

Amount - Will automatically calculate when you hit save.

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

The screenshot shows the 'Manage Expenses' page. At the top, there are tabs for 'Manage Expenses', 'Card Transactions', and 'Process Reports'. Below the tabs, there's a section for 'TRIP NAME' with a 'Delete Report' and 'Submit Report' button. A status bar indicates 'Not Submitted | Report Number: ZKX0JP'. A 'REQUEST' box shows 'Approved' and '\$185.00'. Below this, there are tabs for 'Report Details', 'Print/Share', 'Manage Receipts', and 'Travel Allowance'. The 'Travel Allowance' tab is selected, and the 'Manage Travel Allowance' button is highlighted with a yellow box. Other buttons include 'Add Expense', 'Edit', 'Delete', 'Copy', and 'Allocate'. A 'View: Standard' dropdown is at the bottom right.

2. Create New Itinerary

The screenshot shows the 'Travel Allowances For Report: Employee Per Diem' page. At the top, there are tabs for '1 Create New Itinerary', '2 Available Itineraries', and '3 Expenses & Adjustments'. The '1 Create New Itinerary' tab is selected and highlighted with a yellow box. Below the tabs, there's a section for 'Assigned Itineraries' with 'Edit' and 'Unassign' buttons. A table with columns 'Departure City', 'Date and Time', 'Arrival City', 'Date and Time', and 'Arrival Rate Location' is shown, with a message 'No Assigned Itineraries Found'.

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:

The screenshot shows the 'Itinerary Info' section. It has a title 'Itinerary Info' and two input fields: 'Itinerary Name' with the value 'Employee Per Diem' and 'Selection' with the value 'USGSA'. Below these fields, there are three buttons: 'Add Stop', 'Delete Rows', and 'Import Itinerary'. The 'Import Itinerary' button is highlighted with a yellow box.

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

Create New Itinerary

Available Itineraries

Expenses & Adjustments

Itinerary Info

Itinerary Name

Employee Per Diem

Selection

USGSA

Add Stop

Delete Rows

Import Itinerary

☐

Departure City¹

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

Edit Itinerary

Available Itineraries

Expenses & Adjustments

Itinerary Info

Itinerary Name

Employee Per Diem

Selection

USGSA

Add Stop

Delete Rows

Import Itinerary

☐

Departure City¹

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

Create New Itinerary

Available Itineraries

Expenses & Adjustments

Assigned Itineraries

Edit

Unassign

Departure City

Date and Time¹

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

Expense Report – Adding Meals (2025)

Otter Travel

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 Go

Exclude | All ☐

	Date/Location ¹	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

<input type="checkbox"/>	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
						\$156.00

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

<input type="checkbox"/>	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
						\$156.00

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

	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

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

	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
							\$202.00

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

Allocate

Expense Type * * Required field

Meals Charged on Campus Issued Card

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. *Receipts are required for any meals purchased on the campus issued travel card.