After your travel has ended, you will need to submit a travel expense report to reconcile any travel expenses you have made using your Travel and Expense card or using your personal funds.

Create a Travel Expense Report

To create a travel expense report, click the Expense tab at the top of the Concur page. Underneath the Manage Expenses section you will need to select + Create New Report.

A Create New Report window will popup, with Travel Expense Report already selected. This is your report header. Update all relevant and required fields on the Request Header page, including any additional fields, as applicable to the trip. Required Fields are identified by a * (red asterisk) on the right side of the field name.
Requests cannot be submitted if there is data missing for required fields. *Note: If you create a new report from your approved pre-trip travel request, the information you entered for the pre-trip will be copied into the report header for the Travel Expense Report.*

**Report Name**

The Report Name should be descriptive enough for you and your budget authorities to know the purpose of the request. Best practices include using the location and dates of your travel in the Report Name field (i.e., “ABC Conf (4/10/21) Seattle WA” or “Annl VIP Conf in Tampa 3/23-3/27”). This field is limited to 32 characters.

If there isn’t enough space in the Report Name box, additional information can be provided under the Detailed Trip/Report Purpose or the Comments sections.

**Business Travel Start & End Dates**

Enter the beginning and end dates of your travel or non-travel.

**Report Purpose**

From the Report Purpose dropdown menu, you will need to select one of the following reasons for your travel: Community Relations, Conference, Mileage Only, Other, Professional Development, Recruitment, or Research Activities.

**Detailed Trip/Report Purpose**

In the Detailed Trip/Report Purpose you will explain your business purpose and the benefit of the travel for the University.
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Traveler Type
From the Traveler Type dropdown menu, select one of the following types: Employee, Group Travel, or Student (OSU).

Note: Non-employee and Student (Non-OSU) types cannot be processed through Concur, so even though these types are available, please do not select them. Please contact Travel@oregonstate.edu for details on how to reimburse travel expenses for these types.

Trip/Report Type
For the Trip/Report Type select whether your trip was Domestic or International.

Personal Travel
When asked if your trip included personal travel, please select Yes or No; if your trip did include personal travel you are required to include the dates in the text box for the Personal Travel Dates question.

How You Booked Your Travel
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This question helps you and your travel expense approver know if there will be documentation already uploaded and available in Concur. You will need to select either Booked outside Concur & Agent, Booked with Agent, or Booked with Concur Online.

Index and Activity Code
You can search for the Index, or funding source, that will be charged for these expenses. If needed, you can also include an Activity Code.

Report Date and Comments
The Report Date will auto-populate to the current date; you can change this if needed. In the Comments section you can provide additional information about your travel, either for clarification or to note exceptions.

Claim Travel Allowance
If your report includes travel, and you require Per Diem for meals or incidentals, you can select Yes, I want to claim travel allowance. If you have used your Travel & Expense card to purchase meals, you
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would like to be reimbursed for meals at cost, or you do not plan to claim reimbursement for meals, select **No, I do not want to claim travel allowance.**

**Claim Travel Allowance**
Select if your report includes travel and you require Per Diem for meals or incidentals.

- Yes, I want to claim Travel Allowance
- No, I do not want to claim Travel Allowance

Once all required sections have been completed, select **Next** at the lower right corner of the page. The **Travel Expense Report** will be created and expenses (i.e., lodging, meals, car rentals, et cetera) and receipts can be added before submitting it for approval.

**Entering in Travel Allowances**

Travel allowances, formerly known as per diem, are daily rates for meals and incidentals determined based on your location. These new rates are calculated by **U.S. General Services Administration (GSA)** and no longer take into account the start or end times of your travel. Because of this change, the rates now provide 75% of the cost of meals and incidentals for the first day and last day of travel.

**Create Itinerary**

If you have not submitted a pre-trip travel request (due to not being able to use Concur prior to your travel, you will need to **Create a New Itinerary**. Enter in your departure city, date of departure, and time of departure; then enter in your arrival city, date of arrival, and time of arrival. Select **Save**.
Concur will predict the next step of your itinerary as your return trip and will prepopulate your departure city. You can correct this, if needed. If no correction is needed proceed in entering your departure information and arrival information for your return trip and select **Save**.
Once you have finished creating your trip itinerary, select Next >> to be taken to the Expenses and Adjustments tab.

**Available Itineraries**

If you have any approved pre-trip travel requests, those itineraries will appear in the Available Itineraries section.
After reviewing the itineraries, and assigning any available itineraries if needed, select the **Done** button or **Next > >** button at the lower right corner.

### Expenses and Adjustments

The **Expenses and Adjustments** tab is the last tab you need to review for Travel Allowances. This is where you will claim your travel allowance, formerly known as per diem.

You may notice that your first and last day of travel are now at 75% of per diem. The rates may be a little different than the rates you are used to seeing, and how they are distributed has changed as well. There is also $5.00 included for daily incidental fees and tips.
If a meal was provided for you can opt out of claiming the meal by selecting the checkbox for the meal provided. If the meals and incidentals were completely covered for you on one day, or on certain days, you can select the **Exclude All** checkbox for that day. Your meals and incidentals allowance totals will update based on your selections.

Once you are done editing your travel allowance, select **Create Expenses** at the bottom right corner of the screen.

**Adding Other Expenses**

Select **Add Expense** and a popup window will appear. You can scroll or start typing the name of the expense to search for it.
Adding Lodging Expenses

When you are adding lodging to a travel expense report, you will need to itemize the cost of your stay for each day. Once you have added commercial lodging as an expense, follow these steps to itemize your stay.
Click **Save Expense**, window will pop up notifying you, “This expense has been saved. You are required to itemize this expense. Would you like to do that now?”

If you select **No**, you will be required to itemize your lodging before you are able to submit the travel expense report. If you select **Yes**, you will be taken to the **Itemizations** tab to itemize your expenses for the lodging.

**Itemizations**

Under the **Itemizations** tab, select **Create Itemization**.
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If you were charged different rates based on specific dates (i.e., Friday and Saturday), select **Not the Same**. You will be able to enter in the room rate, taxes, and fees for each night. If your room rates were the same for each night of your stay, select **The Same Every Night**.

You will need to enter in the **Room Rate (per night)**. For taxes and fees, there are three text boxes: **Room Tax (per night)**, **Tax 2 (per night)**, and **Tax 3 (per night)**. **Room Tax (per night)** text box, you will enter in the assessed room tax for each night of your stay. If there are additional taxes or fees associated with your stay, such as a resort fee, please enter those in the text boxes of **Tax 2 (per night)** & **Tax 3 (per night)**. After entering your rates and taxes, select **Save Itemization**.
Now you will need to upload a copy of your receipt. Select the "Attach Receipt Image" box to the right of your itemized lodging.

A popup window will appear. Click "Upload Receipt Image", and you can search your computer for the receipt you would like to upload.
After uploading the appropriate receipt, click **Save Expense** in top right corner.

### Submitting the Travel Expense Report

After entering in all your expenses, itemizing them if necessary, and uploading receipts for your travel, you are ready to submit for approval and processing.

At the top right corner, select **Submit Report**. If you have any alerts, you will be prompted to review and if needed, resolve them, before submitting your report.