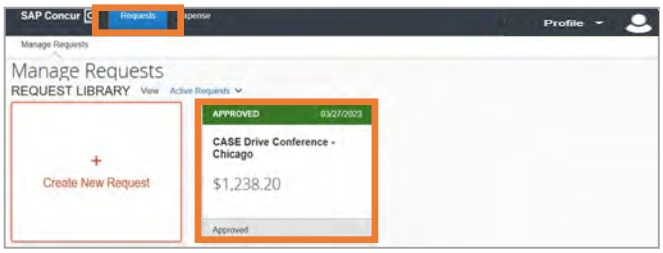
UNC
FINANCE AND OPERATIONS
Finance and Budget

# Utilizing the Travel Allowance Wizard

The Travel Allowance Wizard can be used to add meal per diems to your report as well as review the allowable lodging rate for your destination. Rates listed in the Travel Allowance Wizard are provided by the General Services Administration (GSA) for travel within the Continental United States; Department of Defense for travel to Alaska, Hawaii, US Territories, and Possessions; and the Department of State for all foreign travel. For more information on per diem rates and lodging allowances, please review the Travel Policies and Procedures.

## Adding Meal Per Diems

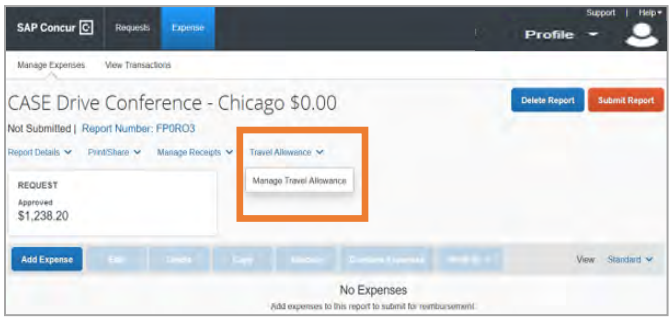
1. Click the **Requests** tab and then select the **Request** for the appropriate trip.



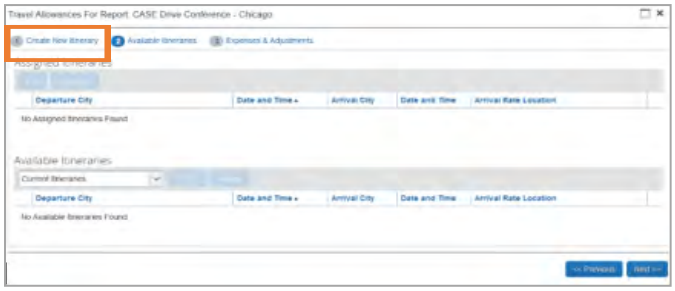

2. Select the **Create Expense Report** button to create a new Expense Report.

**Note:** If a Travel Request was not submitted or approved, please create a new report by selecting the **Expense** tab, and then **Create New Report**.

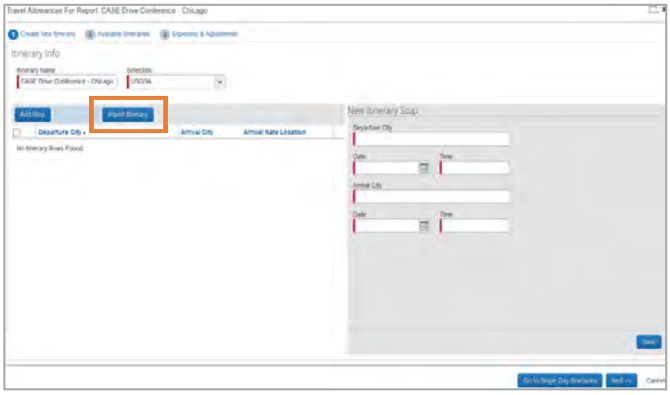
3. Click the **Travel Allowance** drop-down and select **Manage Travel Allowance**.




4. If no itinerary is listed, select the **Create New Itinerary** button to create itinerary.



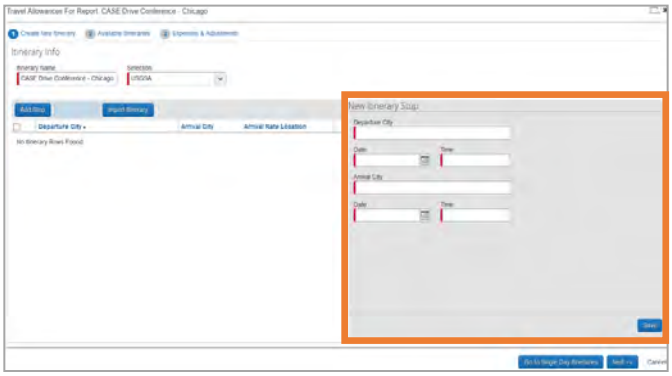

5. If the flight was booked via Concur Travel / World Travel Inc, click the **Import Itinerary** button.




**Result**: Available trips will display.

6. Select the trip. Then select **Import**.

7. If the Trip did not include a flight or if the flight was booked outside of the University Travel Program, create an itinerary using the fields on the right. Then click **Save**.



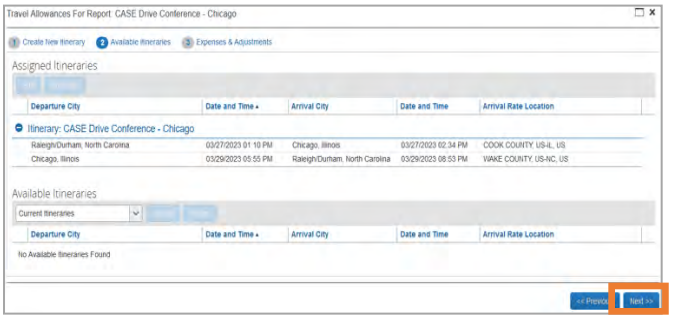
**Note**: All itineraries must contain at least 2 rows.

**Result**: Your itinerary is saved and added.

8. Click the **Next** button.

**Result**: Details of the trip itinerary display.

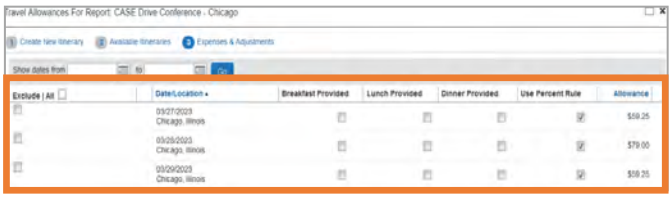
9. Click the **Next** button if no changes are needed.



**Result**: Expenses and Adjustments Matrix displays.

10. Select the meals that were provided for each day.

**Important:** Employees should check off any meals they did not pay for out of pocket in order to exclude them from the Daily Allowance.

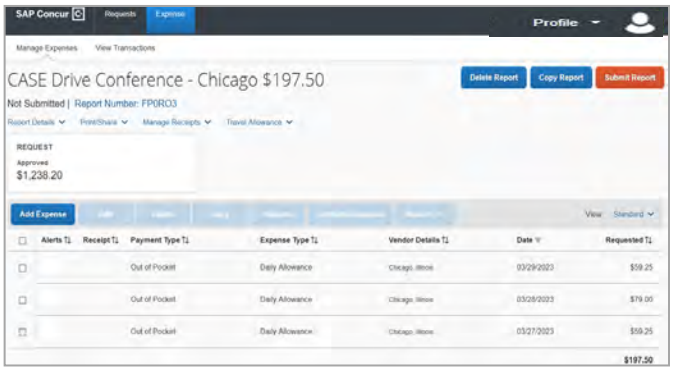


11. Select the **Use Percent Rule** checkbox for all dates of travel.

**Note**: This allows the system to evaluate the nightly hotel cost against the Allowable Lodging rate plus 50%.

12. Select **Create Expenses** when done.

**Result:** The expenses are added to the Expense Report.



## Additional Notes

- First and last day of travel are automatically calculated at 75% of the full day's per diem, therefore allowance is less.
- The meal per diem rate includes a set amount for Breakfast, Lunch and Dinner as well as an amount for Incidentals. You will receive the Incidentals amount even if all meals are provided in a given day.
- The amount for incidentals is provided to cover the cost of out of pocket tips to porters, baggage carriers, hotel staff, etc.
- For personal days of travel during your trip, please check the box for Exclude on the left-hand side of the Expenses & Adjustments matrix. This will exclude the full day's per diem, including the incidental amount.
- Always complete your itinerary in the Travel Allowance Wizard first before adding your hotel expense to your report.