Concur Travel Allowance *aka* Per Diem Changes Effective 12/1/26

What is a Travel Allowance?

- In Concur, Travel Allowance is a module that calculates per diem amounts
  - Per diem is based on trip details such as travel destination
    - Per diem does not require receipts
    - Includes incidentals rate ($5/day domestic, various for international destinations)
    - The rate is reduced to 75% of the daily rate on travel dates – IRS requirement, not a TCU requirement
  - Domestic per diem rates are sourced from the U.S. General Services Administration (GSA)
  - International per diem rates are sourced from the U.S. Department of State

Travel Allowance versus Per Diem

- Concur uses the term Travel Allowance rather than per diem, however Travel Allowance and per diem are the same concepts
  - Travel Allowance is Concur's software module to calculate and manage per diem
  - Typically TCU refers to the daily rate given to cover business travel costs as per diem

When is Per Diem Allowed?

- Per diem is allowed when an employee travels outside their tax home for a qualifying duration on TCU business
  - Allowable with an overnight stay
  - Per the IRS, per diem is **not** allowed within TCU's tax home, **even with an overnight stay**
    - TCU's tax home defined and discussed in TCU Tax Home Guidelines https://vcfa.tcu.edu/contracts-procurement-travel/travel-expense/TCU-Tax-Home-Guidelines-Final.pdf
    - Concur will not allow users to record per diem when traveling within TCU's tax home
      - Travelers may record Meals – One Day Trip (Exception Based)
        - » Requires receipts and is taxable, per the IRS

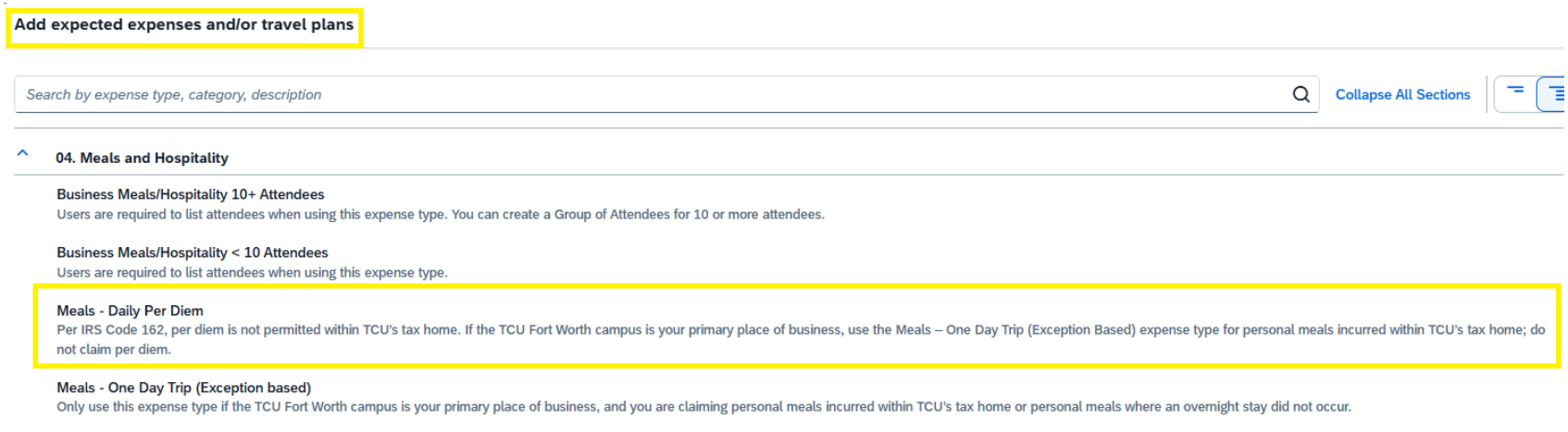
When is Per Diem recorded in Concur?

- Per Diem is included in Concur Request and Expense reports
- An approved Request report is mandatory for all overnight employee travel
  - The Request is created in Concur
  - An approved Request is required to submit an overnight Travel Expense Report in Concur
  - If traveling internationally, additional pre-approval is required through TCU Global

What Changed?

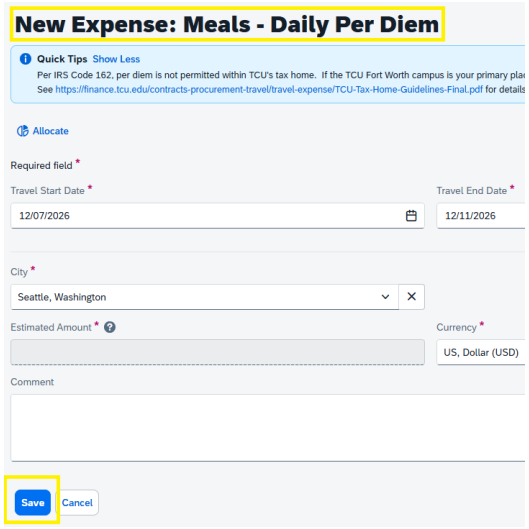
- Currently, travelers add the Meals – Daily Per Diem expense type to their Concur Request to estimate per diem



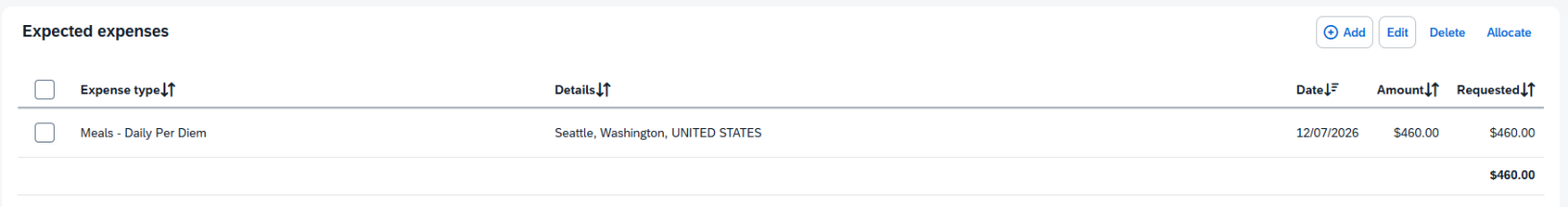


What Changed Cont'd

- When saved, the per diem is calculated in the Request



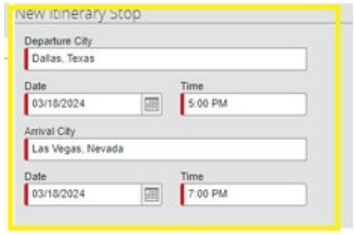


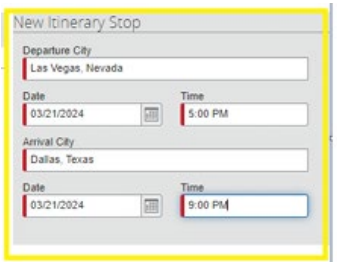


What Changed Cont'd

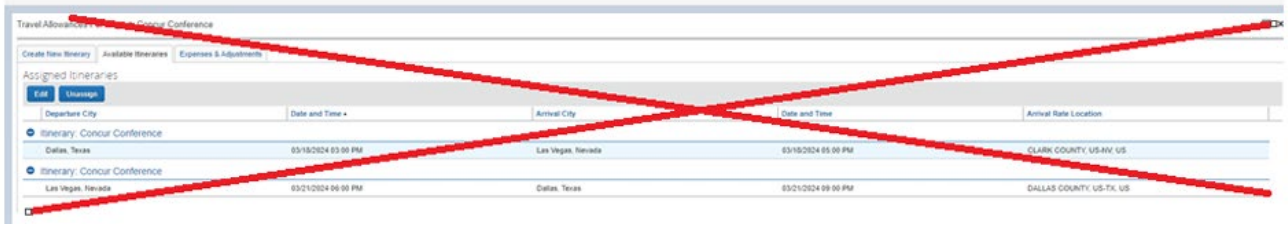
- After travel, when completing their Expense Report, travelers are required to create an itinerary to calculate their per diem
  - This requires four "segments" of travel







  - Often calculated incorrectly, requiring users to start over



New! Effective 12/1/26

- Travel Allowance is created in the Concur Request
  - Itinerary is created in the Request to calculate per diem
  - Itinerary and per diem AUTOMATICALLY transfers into the Expense report
    - Itinerary requires fewer “segments” to be entered
    - Less clicks to proceed and save, fewer errors
    - One-time entry = No longer requires per diem to be calculated in both the Request and the Expense report
    - Expense reports list daily Meals and Incidental rate separately rather than combined



Managing Travel Allowance effective 12/1/26

- In the Concur Request, select Add Travel Allowance from the Manage Travel Allowance dropdown

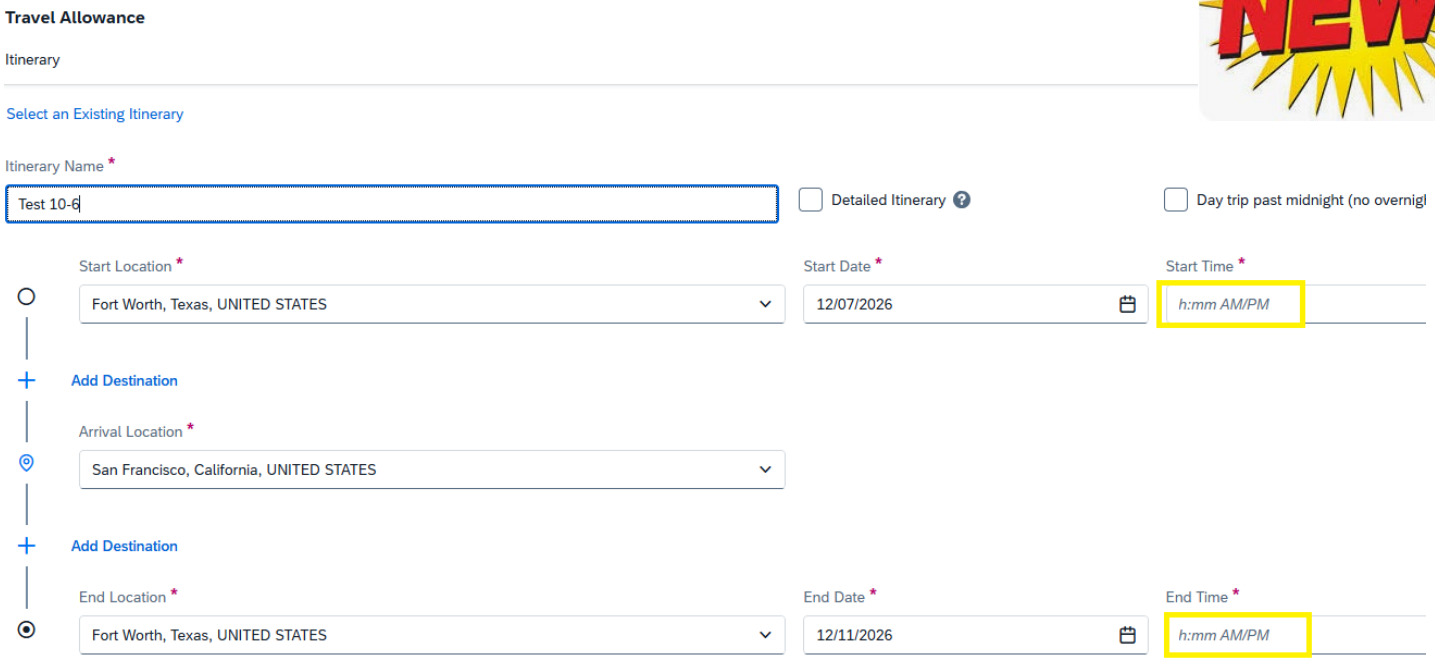




Managing Travel Allowance effective 12/1/26

- The Request itinerary is created based on information in the report header, travelers only need to add the travel times



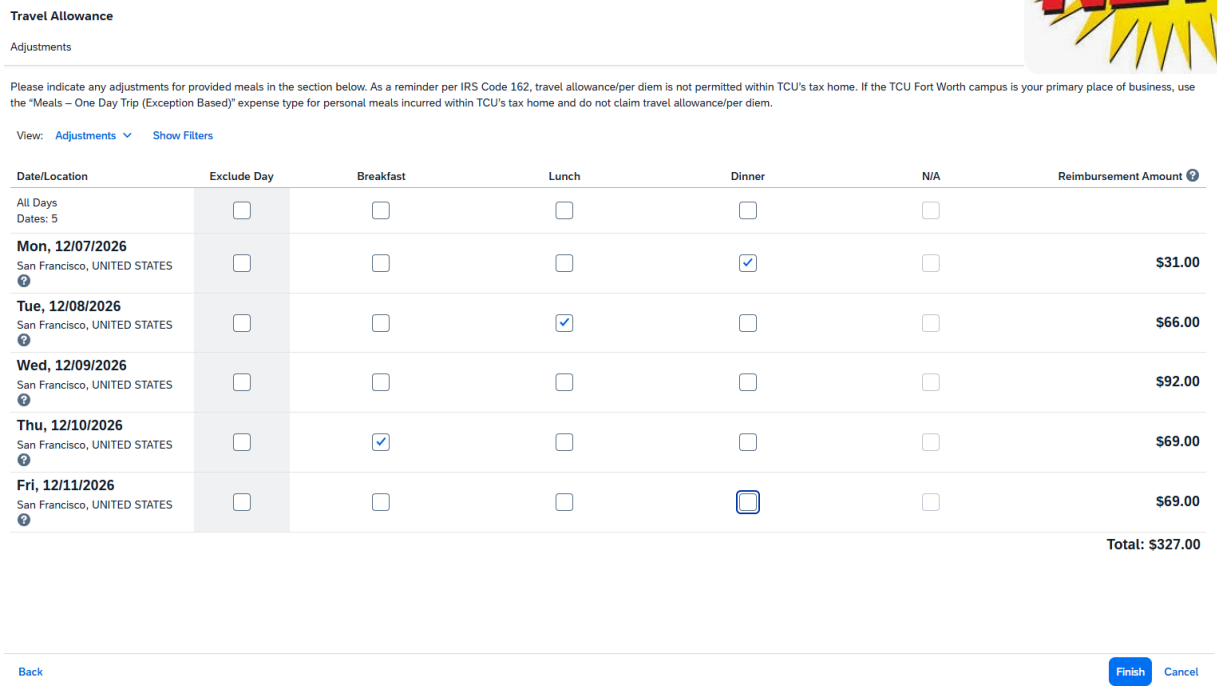


Managing Travel Allowance effective 12/1/26

- In the Request Travel Allowance, adjust the per diem for any meals expected to be provided

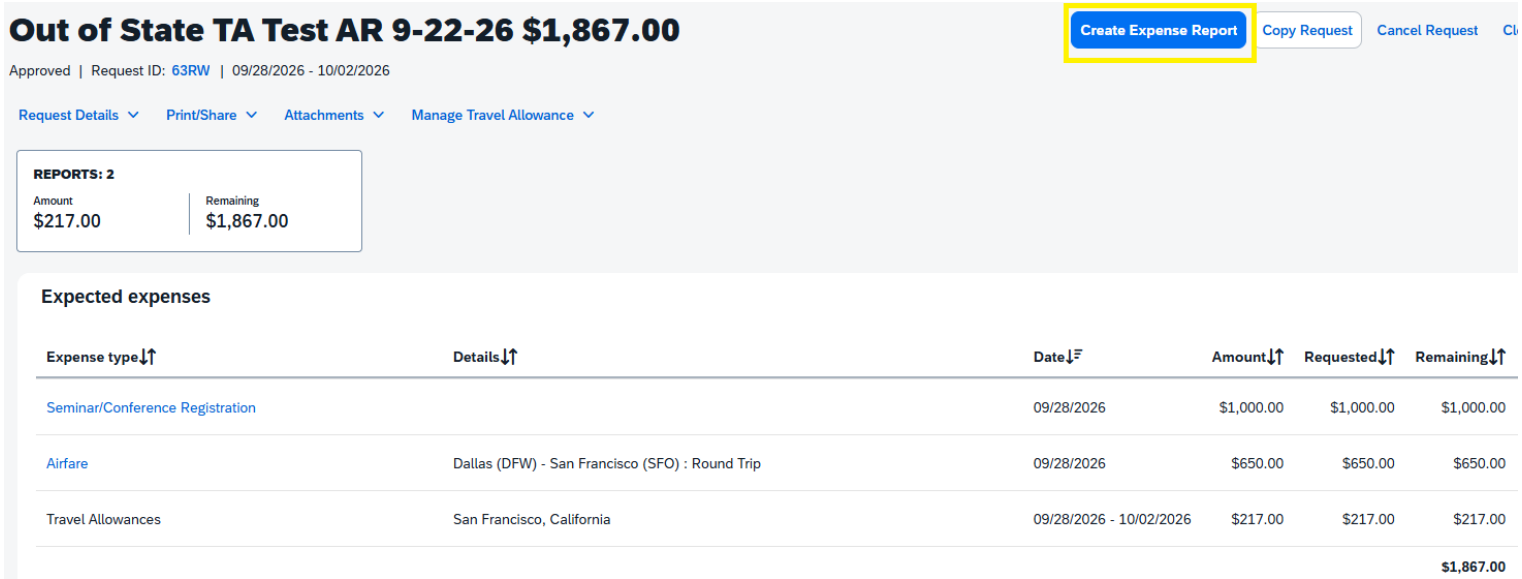


You can update exclusions after travel in your Expense report if necessary



Managing Travel Allowance effective 12/1/26

- After travel, create an Expense report from the approved Request
  - Same as the current process



Managing Travel Allowance effective 12/1/26

- Per diem populates automatically in the Expense report
  - NEW - Daily Per Diem – Meals line is separate from Daily Per Diem – Incidentals line
    - Incidentals were previously included in the meal line



Test 10-6 $327.00

Not Submitted Report number: GLZA2A Requests: 1 $327.00 Approved

Report Details Print/Share Manage Receipts Travel Allowance

Expenses (10)

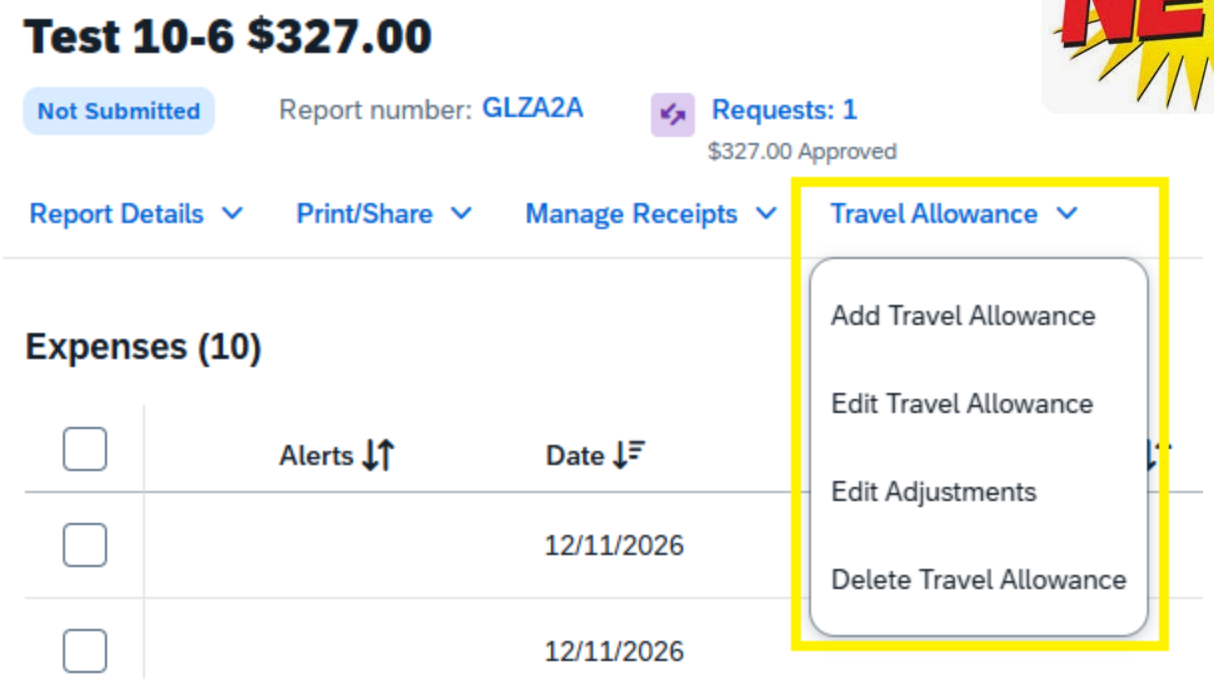
Add Expense Edit Delete Duplicate Allocate Combine Expenses Move

Alerts	Date	Receipt	Attributes	Expense Type	Vendor Details	Payment Type	Requested	Actions
	12/11/2026			Daily Per Diem - Incidentals	San Francisco, California	Employee Paid	$3.75	•••
	12/11/2026			Daily Per Diem - Meals	San Francisco, California	Employee Paid	$65.25	•••
	12/10/2026			Daily Per Diem - Meals	San Francisco, California	Employee Paid	$64.00	•••
	12/10/2026			Daily Per Diem - Incidentals	San Francisco, California	Employee Paid	$5.00	•••
	12/09/2026			Daily Per Diem - Incidentals	San Francisco, California	Employee Paid	$5.00	•••
	12/09/2026			Daily Per Diem - Meals	San Francisco, California	Employee Paid	$87.00	•••
	12/08/2026			Daily Per Diem - Meals	San Francisco, California	Employee Paid	$61.00	•••
	12/08/2026			Daily Per Diem - Incidentals	San Francisco, California	Employee Paid	$5.00	•••
	12/07/2026			Daily Per Diem - Incidentals	San Francisco, California	Employee Paid	$3.75	•••
	12/07/2026			Daily Per Diem - Meals	San Francisco, California	Employee Paid	$27.25	•••

Managing Travel Allowance effective 12/1/26

- You may adjust the per diem in the Expense report, if needed





Managing Travel Allowance effective 12/1/26

- Edits to record actual exclusions are easy!
  - Edit Adjustments
  - New total is automatically calculated



Travel Allowance

Adjustments

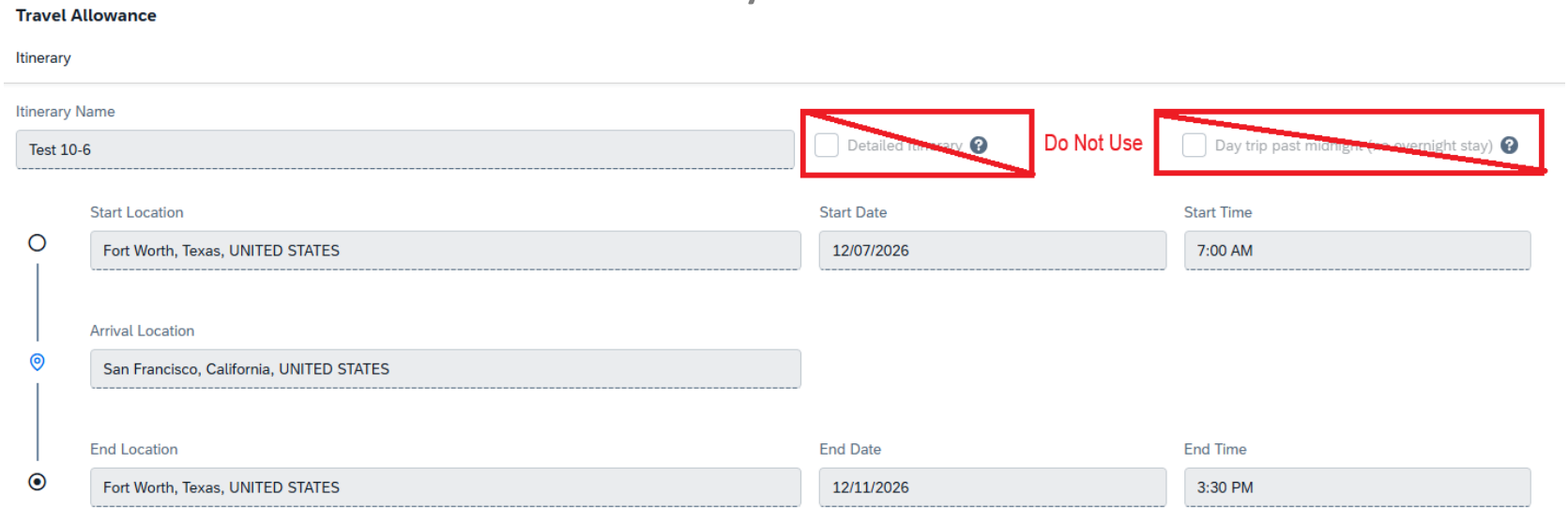
Please indicate any adjustments for provided meals in the section below. As a reminder per IRS Code 162, travel allowance/per diem is not permitted within TCU's tax home. If the TCU Fort Worth campus is your primary place of business, use the "Meals – One Day Trip (Exception Based)" expense type for personal meals incurred within TCU's tax home and do not claim travel allowance/per diem.

View: Adjustments Show Filters

Date/Location	Exclude Day	Breakfast	Lunch	Dinner	N/A	Reimbursement Amount
All Days Dates: 5	☐	☐	☐	☐	☐	
Mon, 12/07/2026 San Francisco, UNITED STATES	☐	☐	☐	☐	☐	**$69.00**
Tue, 12/08/2026 San Francisco, UNITED STATES	☐	☐	☑	☐	☐	**$66.00**
Wed, 12/09/2026 San Francisco, UNITED STATES	☐	☐	☑	☐	☐	**$66.00**
Thu, 12/10/2026 San Francisco, UNITED STATES	☐	☑	☐	☐	☐	**$69.00**
Fri, 12/11/2026 San Francisco, UNITED STATES	☐	☐	☐	☐	☐	**$69.00**
						Total: $339.00

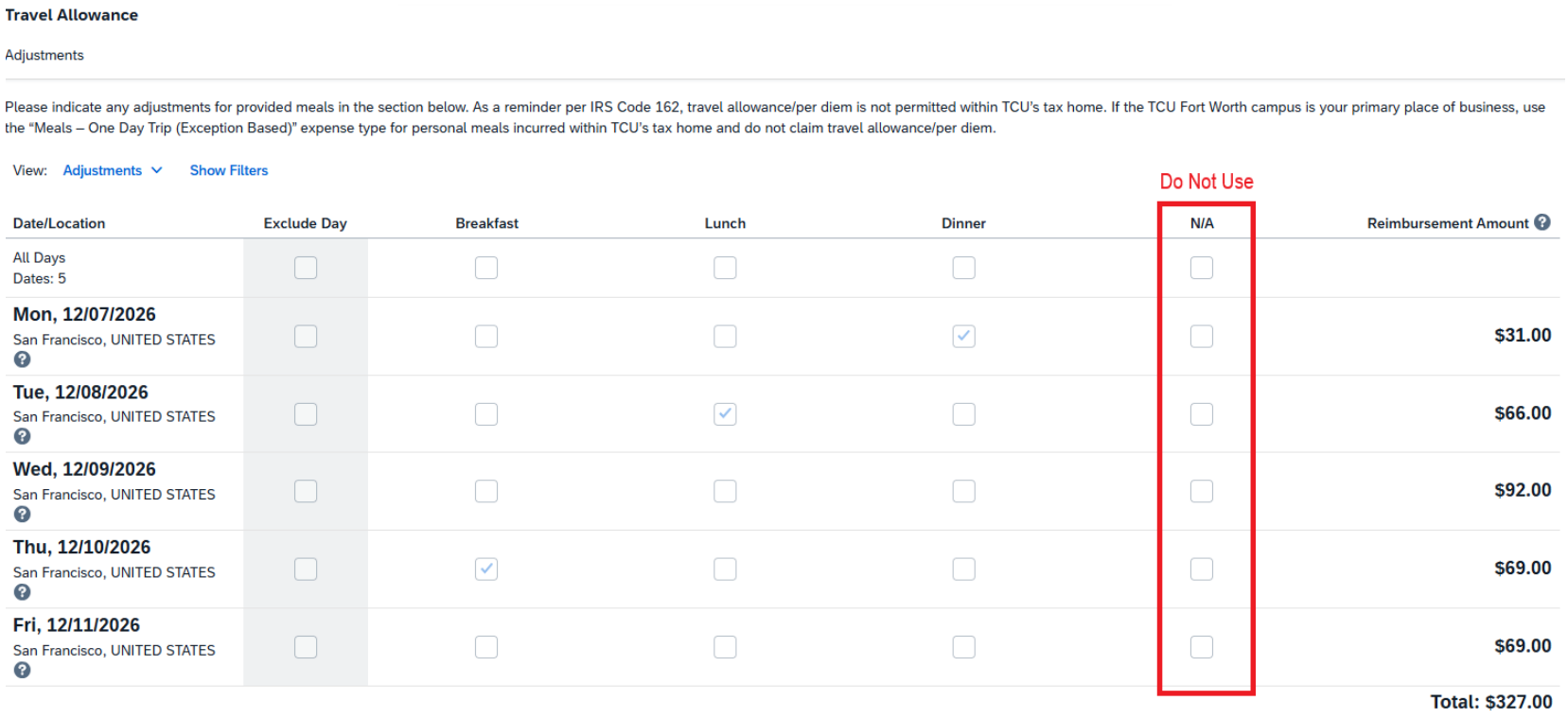
Managing Travel Allowance effective 12/1/26

- Non-Applicable fields in Concur
  - While TCU works to customize Concur, some fields are not applicable and cannot be removed
    - Users should disregard these fields
  - Travel Allowance Itinerary



Managing Travel Allowance effective 12/1/26

- Non-Applicable fields in Concur (Cont'd)
  - Travel Allowance Adjustments



Travel Allowance

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View: Adjustments Show Filters

Do Not Use

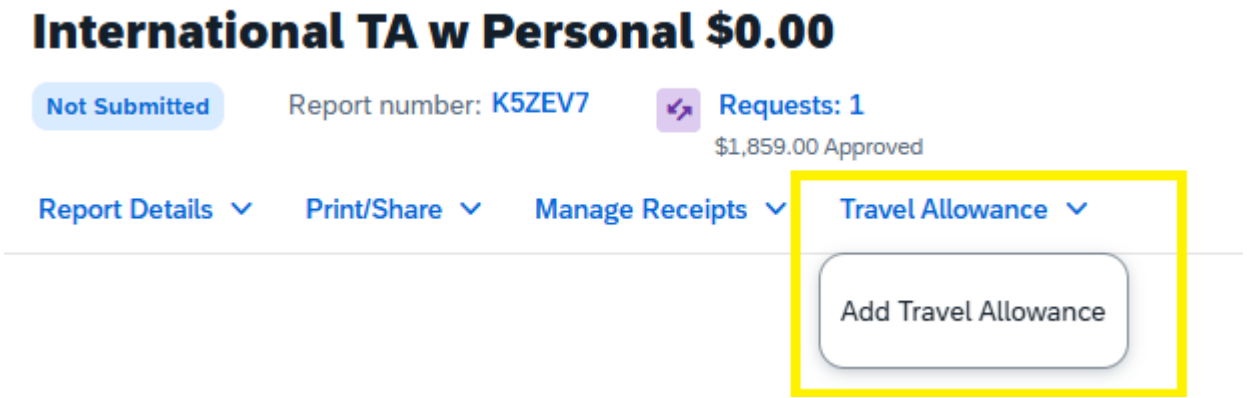
Date/Location	Exclude Day	Breakfast	Lunch	Dinner	N/A	Reimbursement Amount
All Days Dates: 5	☐	☐	☐	☐	☐	
Mon, 12/07/2026 San Francisco, UNITED STATES	☐	☐	☐	☑	☐	**$31.00**
Tue, 12/08/2026 San Francisco, UNITED STATES	☐	☐	☑	☐	☐	**$66.00**
Wed, 12/09/2026 San Francisco, UNITED STATES	☐	☐	☐	☐	☐	**$92.00**
Thu, 12/10/2026 San Francisco, UNITED STATES	☐	☑	☐	☐	☐	**$69.00**
Fri, 12/11/2026 San Francisco, UNITED STATES	☐	☐	☐	☐	☐	**$69.00**
						Total: $327.00

Changes Impact

- Expense Reports created prior to 12/1/26 do NOT need to be revised
  - Concur allows Expense Reports already created to be sent using the “old” per diem method
- Request Reports approved prior to 12/1/26, but the Expense Report has **not been** created prior to 12/1/26
  - Will require travelers create the Travel Allowance (i.e. Itinerary) when creating their *Expense Report*

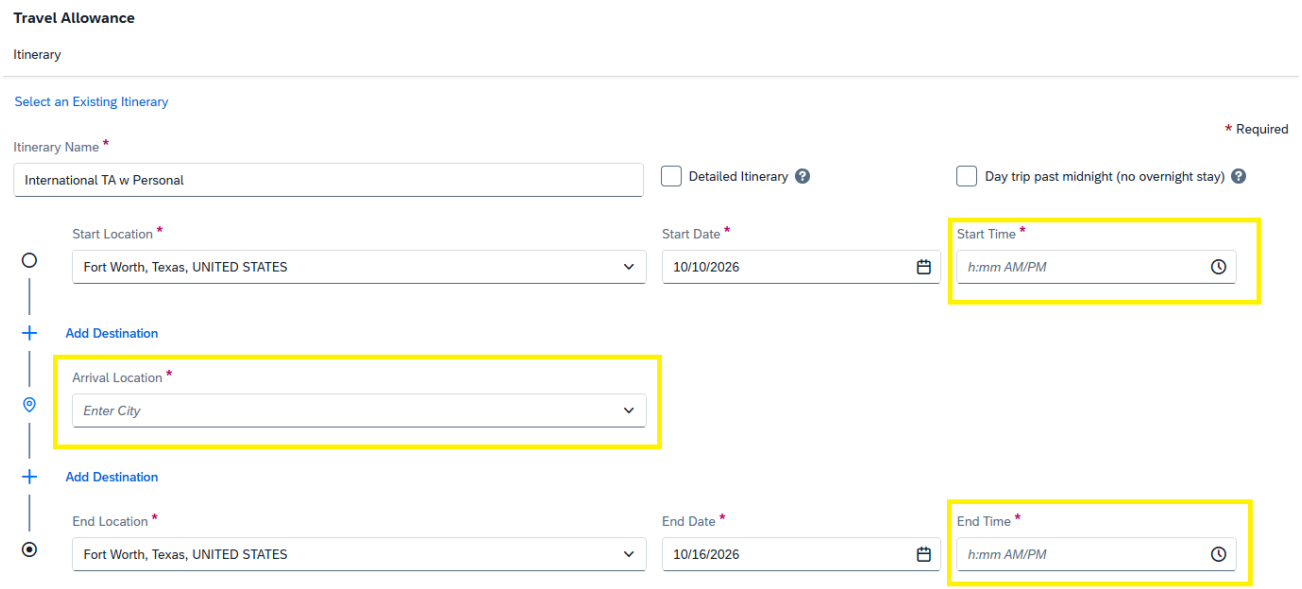
Changes Impact

- For Request Reports approved prior to 12/1/26, to create the Travel Allowance in the Expense Report
  - In the **Expense Report** select Add Travel Allowance from the Travel Allowance dropdown



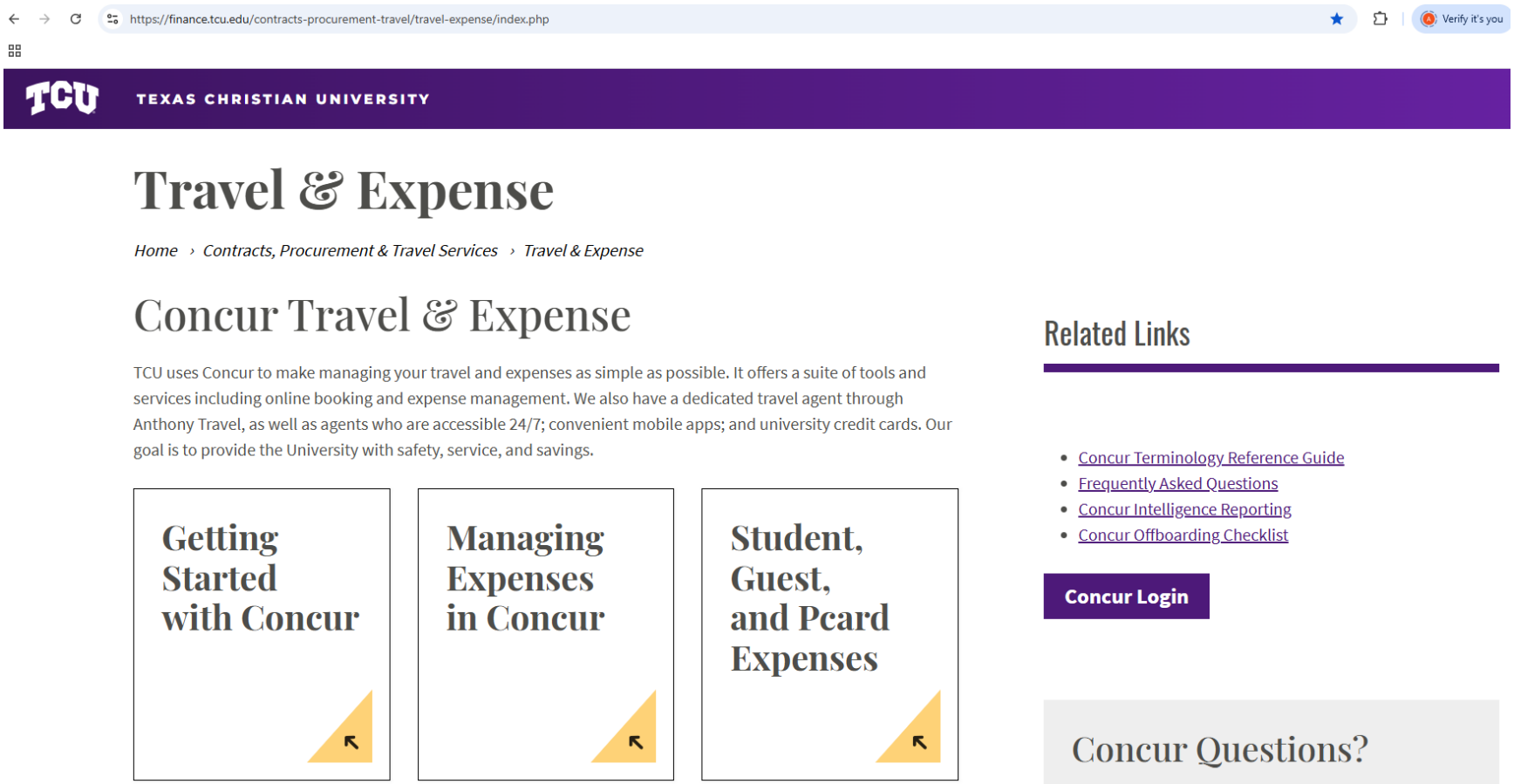
Changes Impact

- Populate required fields in the Itinerary when prompted and proceed through the Travel Allowance adjustments as needed



Resources

https://finance.tcu.edu/contracts-procurement-travel/travel-expense/index.php



Questions

- Email Questions to:

Concur@tcu.edu