



TravelWayne

Travel Allowance and Creating a Meal
Itinerary

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Travel and Fixed Allowances - Overview

1) Travel Allowances

WSU elected to reimburse Travelers for meals according to a schedule of set reimbursement rates, commonly known as "per diem" or "travel allowance" rates. These rates are determined by government and company policies and may differ depending on location and length of travel as well as partial days of travel, seasonal travel, etc. Travel allowances apply to meals and incidentals.

Fixed Allowances (Per Diem)

With fixed allowances, you are paid a fixed amount regardless of how much you spend. [GSA Per Diem Rates](#) For example, if the fixed rate for meals (including incidentals) is \$71.00 USA per day.

- If you spend less than \$71.00 USA per day, you keep the difference.
- If you spend more than \$71.00 USA per day, you are responsible for paying the difference.

Since you are paid a fixed daily amount, you are not required to keep track of your *actual* expenses or collect receipts. Instead, The Expense Report creates the fixed-amount of expenses based on the location and duration information provided in your itinerary.

2) WSU Policy

There are two adjustments required when applying the per diem rate during one's travel. First, if a conference or meeting provides a meal, the traveler should adjust their per diem downward by the appropriate amount of the provided meal. Second, meals allowed during travel are marked with an X below:

Outbound	Breakfast	Lunch	Dinner
Depart before 2:00pm		X	X
Depart after 2:00pm, before 8:00pm			X

Inbound			
Arrive before 12:00pm	X		
Arrive between 12:00pm and 6:00pm	X	X	
Arrive after 6:00pm	X	X	X

Provided meals – checkboxes

Select the check box for each meal provided. For each check box selected, the amount in the **Allowance** column is reduced by the associated amount in the rate tables.

Travel Allowances For Report: Blackboard Conference


Create New Itinerary Available Itineraries Expenses & Adjustments Reimbursable Allowances Summary

Show dates from to Go

Exclude All	Date/Location	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	03/07/2011 San Diego, California	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.00

Select the check box to **Exclude expenses** for each row that represents personal time; for example, if you add a few personal vacation days to the end of a trip and will not be reimbursed by WSU then you should exclude those meal rates.


3) Creating a Standard Itinerary

Once the traveler has return from their trip and is ready to create an Expense Report from a "Travel Request" Click the Green Arrow 

Active Work

New Travel Request View Travel Requests

Travel Requests (10) Expense Reports (1)

Travel Request Name	Travel Request ID	Status	Travel Request Dates	Total	Expense Report?
Blackboard Conference	36MN	Approved	09/19/2012 09/22/2012	USD 1,580.00	

On the **1 Create New Itinerary** page, Expense automatically copies the expense report name into the **Itinerary Name** field. You can change it if desired.

How to...

1. On the **New Itinerary Stop** section on the right side of the page, enter the information for the first stop of the trip.

Travel Allowances For Report: Sales Seminar - San Diego

1 Create New Itinerary 2 Available Itineraries 3 Expenses & Adjustments

Itinerary Info

Itinerary Name
Sales Seminar - San Diego

Add Stop Delete Rows Import Itinerary

Departure City	Arrival City	Arrival Rate Location
No Itinerary Rows Found		

New Itinerary Stop

Depart from (city)
Seattle, Washington

Date
03/07/2011

Time
8:00 AM

Arrive in (city)
San Diego, California

Date
03/07/2011

Time
11:22 AM

Save

Go to Single Day Itineraries Next >> Cancel

Field	Description
Depart from (city)	The user starts typing (at least three letters) the name of the city. A list appears. The user selects the desired city.
Date	The user types the departure date or selects it from the calendar.
Time	The user types the departure time (local time for the departure location). Note the following about entering time: <ul style="list-style-type: none"> For standard workday times (between 7:00 AM to 6:00 PM), the user can type whole numbers instead of the hour, minute, and AM or PM. For example, if the user types 7 and then presses TAB or clicks in another field, 7:00 AM appears. If the user types 5 and then presses TAB or clicks in another field, 5:00 PM appears. If the company uses a 12-hour clock, the user can type 22 and 10:00 PM appears. If the company uses a 24-hour clock, the user can type 22 and 22:00 appears.
Arrive in (city)	The user starts typing (at least three letters) the name of the city. A list appears. The user selects the desired city.
Date	Expense fills the departure date into this field since each stop of the trip usually starts and ends on the same day. The user changes the date if necessary.
Time	The user types the arrival time (local time for the arrival location). (This field works like the Time field described previously.)

2. Then click **Save**:

- The saved stop information appears on the left side of the page.
- Expense fills the arrival city from the previous stop to the **Depart from (city)** field, based on the assumption that the user will likely be leaving from this location. The user changes it if necessary.
- All other fields are cleared.

Travel Allowances For Report: Blackboard Conference

Edit Itinerary | Available Itineraries | Expenses & Adjustments | Reimbursable Allowances Summary

Itinerary Info

Itinerary Name
Sales Seminar - San Diego

Add Stop | Delete Rows | Import Itinerary

	Departure City ^	Arrival City	Arrival Rate Location
<input type="checkbox"/>	Seattle, Washington 03/07/2011 8:00 AM	San Diego, California 03/07/2011 11:22 AM	SAN DIEGO COUNTY, US-CA, ...

New Itinerary Stop

Depart from (city)
San Diego, California

Date

Time

Arrive in (city)

Date

Save

Go to Single Day Itineraries | Next >> | Done

3. Complete the fields for the next stop of the trip.
4. Save when done.
5. Complete all stops using this process.
6. Review the itinerary for accuracy. Change it if necessary.
 - a. To remove a stop, select the desired check box. Click **Delete Rows**.
 - b. To add more stops, click **Add Stop**.
 - c. You may be able to edit the [arrival rate location](#). To do so:
 - i. Click the check box associated with the desired stop. The stop appears in the **Edit Itinerary Stop** section of the page.
 - ii. Scroll to the bottom of that section.
 - iii. Type the new location.
7. After the last stop:
 - d. Click **Next**. The **2 Available Itineraries** page appears.

8. **3 Expenses & Adjustments** page appears.

In the sample below

- The amounts were reduced for the first and last day because the traveler does not receive breakfast on the departure date or dinner on the return date depending on the arrival time. See chart above under **WSU Policy**
- The amount is reduced for the third day because the traveler indicated that breakfast was provided (for example, by the hotel or conference center).

Travel Allowances For Report: Blackboard Conference

Create New Itinerary Available Itineraries **Expenses & Adjustments** Reimbursable Allowances Summary

Show dates from to Go

Exclude All <input type="checkbox"/>	Date/Location ^	Breakfast Provided	Lunch Provided	Dinner Provided	Allowance
<input type="checkbox"/>	03/07/2011 San Diego, California	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.00
<input type="checkbox"/>	03/08/2011 San Diego, California	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$71.00
<input type="checkbox"/>	03/09/2011 San Diego, California	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	\$59.00
<input type="checkbox"/>	03/10/2011 San Diego, California	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$35.00

Update Expenses Cancel

9. Click **Update Expenses**. The system then creates the appropriate expenses for each day, which appear on the user's expense report page.

Note the following about the system-created expenses:

- Meals expenses are assigned the expense type of Fixed Meals
- If the actual meal expenses are imported through the company card import but the user was reimbursed with fixed allowances, then the user should mark the imported expenses as personal.

Blackboard Conference

+ New Expense + Quick Expenses Import Details ▾ Receipts ▾ Print / Email ▾

Expenses Delete Copy View ▾ <<

<input type="checkbox"/>	Date ^	Expense	Amount	Requested
Adding New Expense				
<input type="checkbox"/>	03/07/2011	Fixed Meals San Diego, California	\$59.00	\$59.00
<input type="checkbox"/>	03/08/2011	Fixed Meals San Diego, California	\$71.00	\$71.00
<input type="checkbox"/>	03/09/2011	Fixed Meals San Diego, California	\$59.00	\$59.00
<input type="checkbox"/>	03/10/2011	Fixed Meals San Diego, California	\$35.00	\$35.00
			TOTAL AMOUNT	TOTAL REQUESTED
			\$224.00	\$224.00

New Expense

Expense

To create a new expense, click the expense, click the expense on the

- Lodging ...
- Hotel
- Meals and Entertainment
 - Breakfast
 - Business Meal (attendees)
 - Dinner
 - Entertainment (attendees)
 - Lunch
- Other
 - Booking Fees
 - ...Transportation

Now the traveler is ready to add any other reimbursable expenses!!!!