

# Managing Per Diem for Expense Reports



## Introduction

Baylor’s travel policy now offers two options for individual meal reimbursements and incidentals for travel within the United States: per diem or actual expense method. The traveler may receive a maximum daily per diem (inclusive of taxes, tips, and incidentals). Per diem rates are broken out for breakfast, lunch, dinner, and incidentals. The per diem includes a daily incidental amount to cover fees and tips given to porters, baggage carriers, and hotel staff. Please review the travel policy for more details and the amounts.

You do not need to submit receipts to claim per diem. This document describes how to include per diem when creating a new expense report. Within the Baylor Expense Report, an itinerary is entered and aids in the calculation of the per diem (M&IE) travel allowances.

## Select Per Diem Method

In the first section of the expense report, a question appears and asks you to indicate your preferred method of meal and incidental expense reimbursement. Select the per diem option.

### Important Notes:

- The per diem method applies to US travel only.
- The same reimbursement method must be used for the duration of the trip.
- Check grant restrictions if paid by a grant.
- Choosing *Actual Expenses* requires itemized expenses and actual receipts if the meal expense is over \$51.

## Enter Travel Information

		Travel Date	Departure Time	Departure Location	Arrival Time	Arrival Location
Edit   Delete		7/25/2018	06:00 AM	Waco	08:00 AM	Dallas
Edit   Delete		7/27/2018	08:00 AM	Dallas	10:00 AM	Waco

In the **Travel** section, provide all travel details. This section is required if claiming per diems. Add travel information one leg at a time or by adding all travel information at once. This section should have a minimum of two stops: the first documents the beginning of your trip, and the second stop documents your return. If there are multiple legs to your trip, continue to add stops. The final stop will represent your return home. Once every destination has been entered and saved, continue to the next step. Failure to add all travel legs will have an impact on the number of per diem days that can be claimed.

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## Add Per Diem Expenses

In this section, the per diem (M&IE) amounts are calculated on a daily basis, with the first and last trip days allowing meals based on the time of your departure.

Click **Add Per Diem Expenses**.

<a href="#">Edit</a>   <a href="#">Delete</a>	7/27/2018	08:00 AM	Dallas	10:00 AM	Waco
<b>Per Diem Expenses</b>					
Per Diem Days Claimed *	<input type="text" value="3"/>				
Were you provided any meals during your trip (e.g. meals at a conference, meals provided by hotel, etc)?	<input type="text" value="No"/>				
<a href="#">Add Per Diem Expenses</a>					

The daily per diem amounts appear on your expense report as shown below. You can un-check boxes as needed.

Note: per diem amounts are pro-rated on travel days based on the time of departure/return. In the example below, dinner is not provided on the final travel day. The amount was calculated based on the time the traveler returned home. For questions about pro-rated rates on travel days, please review the travel policy here.

BAYLOR
Expense Reports Online  
Travel & Entertainment

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[Admin](#)

### Create

Use this form to add per diem items to your trip.

**Per Diem Items**

The current \$51.00 per diem rate is inclusive of sales tax and meal tips.

- [Click here](#) to view the *policy & guidelines* for per diems in expense reports.

Date *	Breakfast	Lunch	Dinner	Incidentals <input type="text"/>	Per Diem Amt	Comments
07-25-2018 ▼	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input checked="" type="checkbox"/> \$23.00	\$5.00	<b>\$51.00</b> **	
07-26-2018 ▼	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input checked="" type="checkbox"/> \$23.00	\$5.00	<b>\$51.00</b>	
07-27-2018 ▼	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input type="checkbox"/> \$0.00	\$5.00	<b>\$28.00</b> **	

(\*) indicates a required field.  
 (\*\*) indicates initial departure or final arrival travel days, whose meals are assigned according to time-based rules.

Save | [Back to Report](#)

Click **Save** once the checkboxes accurately reflect the meals you are claiming.

## Managing Per Diem for Expense Reports



### Meals Provided By Another Source

When meals are provided to you by another source (for example, the conference provided lunch, a business entertainment meal was provided, etc.) indicate this by selecting **Yes** in the dropdown box. The message shown in red will appear.

#### Per Diem Expenses

Per Diem Days Claimed \*

Were you provided any meals during your trip (e.g. meals at a conference, meals provided by hotel, etc)?  Do not claim per diem amount for those meals that were provided.

[Add Per Diem Expenses](#)

After clicking **Add Per Diem Expenses**, you can uncheck any per diem items for which you do not need to be reimbursed. This will adjust the per diem amount accordingly.

#### Per Diem Items

The current \$51.00 per diem rate is inclusive of sales tax and meal tips.

- [Click here](#) to view the *policy & guidelines* for per diems in expense reports.

Date *	Breakfast	Lunch	Dinner	Incidentals	Per Diem Amt	Comments
07-25-2018	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input checked="" type="checkbox"/> \$23.00	\$5.00	\$51.00 **	
07-26-2018	<input checked="" type="checkbox"/> \$11.00	<input type="checkbox"/> \$0.00	<input type="checkbox"/> \$0.00	\$5.00	\$16.00	
07-27-2018	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input type="checkbox"/> \$0.00	\$5.00	\$28.00 **	

(\*) indicates a required field.  
 (\*\*) indicates initial departure or final arrival travel days, whose meals are assigned according to time-based rules.

[Save](#) | [Back to Report](#)

In the example above, the conference provided lunch and the traveler attended a business entertainment dinner during the trip. This is accurately noted by unchecking the appropriate checkboxes.

You have now added per diem (M&IE) expenses to your expense report. You may now proceed with the remainder of your report.

# Managing Per Diem for Expense Reports



## Editing Per Diem Expenses

You can remove or modify expenses by clicking the *Edit Per Diem Expenses* OR *Delete Per Diem Expenses* link(s).

**Per Diem Expenses**

Per Diem Days Claimed \*

Were you provided any meals during your trip (e.g. meals at a conference, meals provided by hotel, etc)?  Do not claim per diem amount for those meals that were provided.

**Edit Per Diem Expenses | Delete Per Diem Expenses**

Date *	Breakfast	Lunch	Dinner	Incidentals	Per Diem Amt	Comments
7/25/2018	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input checked="" type="checkbox"/> \$23.00	\$5.00	\$51.00	**
7/26/2018	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input checked="" type="checkbox"/> \$23.00	\$5.00	\$51.00	
7/27/2018	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input type="checkbox"/> \$0.00	\$5.00	\$28.00	**
Total						<b>\$130.00</b>

Note: If you need to add additional per diem days, you must first modify the information entered into the *Per Diem Days Claimed* field. The number of per diem days cannot exceed total business days or days included in the travel legs.

**Per Diem Expenses**

Per Diem Days Claimed \*

Were you provided any meals during your trip (e.g. meals at a conference, meals provided by hotel, etc)?  Do not claim per diem amount for those meals that were provided.

**Add Per Diem Expenses | Edit Per Diem Expenses | Delete Per Diem Expenses**

Date *	Breakfast	Lunch	Dinner	Incidentals	Per Diem Amt	Comments
7/25/2018	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input checked="" type="checkbox"/> \$23.00	\$5.00	\$51.00	
7/26/2018	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input checked="" type="checkbox"/> \$23.00	\$5.00	\$51.00	
7/27/2018	<input checked="" type="checkbox"/> \$11.00	<input checked="" type="checkbox"/> \$12.00	<input type="checkbox"/> \$0.00	\$5.00	\$28.00	**
Total						<b>\$130.00</b>

The fields shown here on the right must be in synch with the *Per Diem Days Claimed* in the field above.

Other Baylor Participants

Days Spent On Business \*

Dates \*  to

Expense Reports must be sub date or date business enterta

Add Single Travel Leg   Add All Travel		Travel Date	Departure Time	Departure Location	Arrival Time	Arrival Location
<a href="#">Edit</a>	<a href="#">Delete</a>	7/24/2018	06:00 AM	Waco	08:00 AM	Dallas
<a href="#">Edit</a>	<a href="#">Delete</a>	7/27/2018	08:00 AM	Dallas	10:00 AM	Waco