

Entering a Per Diem Claim

This tip sheet will show you how to enter a Per Diem claim on an expense report. Per Diem policy may be found in [Policy 420](#).

Getting Your Documentation

- Per Diems are covered by two expense types – Day Trip Meal Allowance and Meal and Incidental Per Diem. Day Trip Meal Allowance is used on a single-day trip without overnight lodging, and Meal and Incidental Per Diem is used on a multiple-day trip with overnight lodging.
 - Per Diems cover not just your individual meals, but also incidental expenses like transportation to/from the meals, staff tips, etc.
 - Day Trip Meal Allowance is a \$15 reimbursement regardless of location. Meal and Incidental Per Diem is a variable reimbursement based on the city.
 - You must take deductions from your Meal and Incidental Per Diem if the business event provides meals to you. You must also take deductions if you are not travelling for the full 24 hours that day.
 - Per Diems do not cover group meals. Group meals (where more than one person attended, and were paid for as a group) are entered as Meals-Hosted and deducted from your Per Diem.
- Please attach a schedule of the event to verify what meals the event provides. Agenda items such as “Lunch” and “Networking Dinner” are understood to mean provided meals. Agenda items such as “Lunch Break” and “Breakfast on your own” are understood to mean no meal was provided. Please use the line’s Description field to provide clarification if the agenda’s wording might lead to misunderstandings.



BOARD OF REGENTS OF THE UNIVERSITY OF WISCONSIN SYSTEM

February 6-7, 2020
UW-Madison, Union South, 2nd floor
1308 W. Dayton Street
Madison, Wisconsin

Wednesday, February 5, 2020

5:00 p.m. – 6:30 p.m. **Reception and Site Visit***
Mills Hall, George L. Mosse Humanities Building
455 North Park Street, Madison, Wisconsin
Events are by invitation only. Please contact
carrie.olson@wisc.edu for more information.

Thursday, February 6, 2020

9:00 a.m. – 10:30 a.m. **Business & Finance Committee**
Varsity Hall I, 2nd floor, Union South

9:00 a.m. – 10:30 a.m. **Education Committee**
Varsity Hall II, 2nd floor, Union South

10:45 a.m. – 12:15 p.m. **Audit Committee**
Varsity Hall II, 2nd floor, Union South

10:45 a.m. – 12:15 p.m. **Capital Planning & Budget Committee**
Varsity Hall I, 2nd floor, Union South

10:45 a.m. – 12:15 p.m. **Research, Economic Development & Innovation Committee**
Northwoods Room, 3rd floor, Union South

12:15 p.m. **Lunch***
Varsity Hall III, 2nd floor, Union South

Entering Your Claim

Enter the following information to the new expense line. Both Day Trip Meal Allowance and Meal and Incidental Per Diem require the same information, but handle the information in different ways:

1. **Date:** Enter the date you're claiming Per Diem for. The entire day's Per Diem is entered as a single claim. Multiple Per Diem claims for the same date cannot be made.
2. **Description:** Enter additional clarifying information about this transaction. This section may be left blank. An example of clarifying information would be more detail about provided meals if the schedule is unclear. Another example would be lodging locations if not obvious from other claims on the expense report.
3. **Reimbursement Method:** Choose how you would like to be reimbursed. This most likely will be **Personal Funds**. **Personal Funds** are reimbursed to you through ACH (direct deposit) or check.
4. **Expense Location:** Enter the city in which you lodged – Per Diems are based off your lodging location. This may change your reimbursement amount for Meal and Incidental Per Diem, as different locations reimburse different amounts. You may enter this by typing the city and state in directly (ex. "Atlanta, GA"), or by searching using the magnifying glass. Foreign locations are city and country (ex. "Paris, France"). If a location is not in SFS's database, use the county for domestic locations (ex. "Cook County, IL") or "Country, Other Locations" for foreign travel (ex. "China, Other Locations").
5. **Per Diem Deductions:** Click on this box to take any required deductions to your Meal and Incidental Per Diem. Take First/Last Day deductions for any day where you are not travelling the full 24 hours. Take the deductions corresponding to any provided meals from the event.

Meal and Incidental Per Diem - 02/06/2020

*Date

*Expense Type

Description

Payment Details

*Payment

*Amount

Additional Information

*Expense Location

Per Diem Deductions	One >
Accounting	1 >

Cancel
Per Diem Deductions
Done

Date 02/06/2020

Expense Type Meal and Incidental Per Diem

Per Diem Amount 61.00 USD

Deduction Details

	Expense Type	Deduction Percentage
<input type="checkbox"/>	First/Last Day of Trip	75.00
<input type="checkbox"/>	Provided Meal 1-Breakfast	20.00
<input checked="" type="checkbox"/>	Provided Meal 2-Lunch	30.00
<input type="checkbox"/>	Provided Meal 3-Dinner	50.00

If you wish to change the funding string of your expense, you may do so within the same business unit in the Accounting section.

The **Non-Reimbursable** switch should not be used. Non-reimbursable expenses should not be reported, and if your campus asks you to do so, this should be done by selecting a **Prepaid Reimbursement Method**, not by using the non-reimbursable switch. Setting non-reimbursable to yes will void any amount entered in the Amount box and set the line to \$0.

Once you have completed your expense line, you may add additional claims by clicking the **Add** button on the left side of the screen. If you've entered all your expenses and are ready to submit, press the gray **Review and Submit** button in the upper right to take you to the Expense Summary page. Once you review the Expense Summary page, click **Submit** in the upper right. If you'd like to save the expense report for future modification, click the green **Save** button.