Pre-Approvals - Meals Per Diem Wizard

This training document is an overview of how to use the Meals Per Diem Wizard for pre-approvals (PA). Note that the functionality of this expense type is very similar to the expense report (ER) version.

1. Meals-Per Diem Wizard: If meals per diem is being claimed for multiple days, this expense type has the ability to post meals within a designated date range.
2. Start Date: The start date of travel retrieved from the PA Header. This date can be manually changed if needed.

3. End Date: The end date of travel retrieved from the PA Header. This date can be manually changed if needed.

4. Days: The number of days within that start date and end date.

5. Description (Optional): An optional explanation for this expense.

6. Location: Enter in the location of where the meal per diem expenses are being claimed. This location will drive the reimbursement rates. (Note this is by name only and not by zip-code)

7. Activity Code: If there is an activity code, select it from the pre-populated list.

8. Add Entries: After all of the information has been added, select this button to add the expenses
9. The days/daily rates are populated on the right hand side of the screen. The user has the ability to select a day to alter the reimbursement amount by clicking on a single line item.

10. The first and last days of the calculation are designated as “Travel Days” by default. If this is not the first or last day of travel, uncheck the “Travel Day” box.
11. If the user is aware that a meal will be provided to the traveler (i.e. conference provides lunch), check the appropriate box next to the meal.

12. The meal per diem reimbursement has been reduced from $49.50 to $36.75.
13. Add to Report: Select this button to add the meals per diem expense line items to the pre-approval.