

Expense Type Breakdown

Objective: In this segment we will provide detailed information for each expense type available.

1. *Trip Segment(s)* [***REQUIRED**]:

- This expense type is used for showing the different locations you will be visiting on your trip
- Required fields: *Segment Start Date*, *Segment End Date*, *Business Location*, and *Primary Purpose*



Note: You do not need to enter any cost estimates here.



Note: You must fill out this category for EVERY request you submit, even if you are going to a single location.

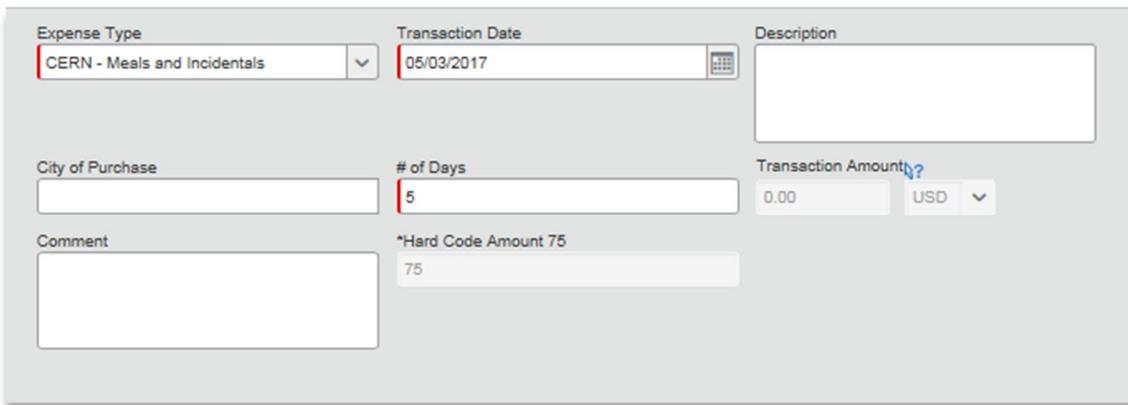


The screenshot shows a form for the 'Trip Segment(s)' expense type. It includes the following fields:

- Expense Type:** Trip Segment(s) [***REQUIRED**] (dropdown menu)
- Segment Start Date:** 05/03/2017 (calendar icon)
- Segment End Date:** 05/09/2017 (calendar icon)
- Business Location:** Menlo Park, California (text input)
- Country:** UNITED STATES (dropdown menu)
- Primary Purpose:** Experiments (dropdown menu)
- Justify Trip Purpose:** (empty text area)

2. *CERN – Meals and Incidentals*:

- This expense type is used only if you are visiting CERN.
- Required fields: *Transaction Date*, and *# of Days*.
- The transaction amount will be estimated for you here using the CERN reduced per diem amount.

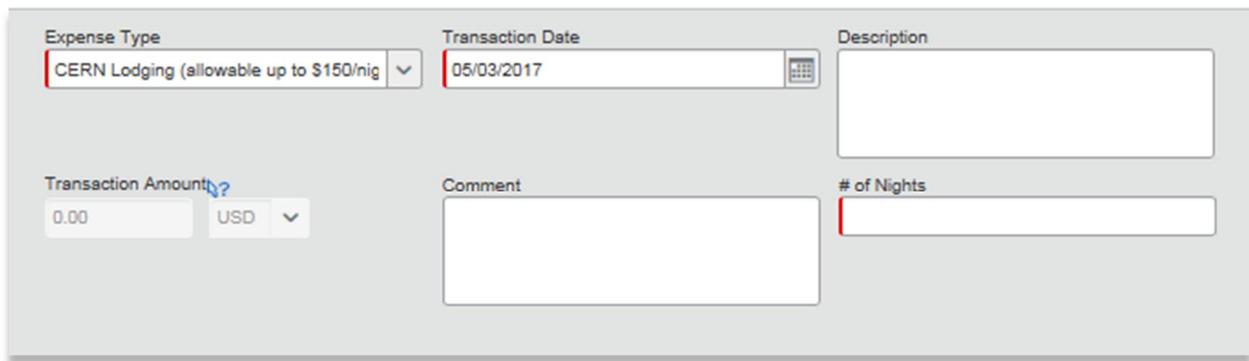


The screenshot shows a form for the 'CERN - Meals and Incidentals' expense type. It includes the following fields:

- Expense Type:** CERN - Meals and Incidentals (dropdown menu)
- Transaction Date:** 05/03/2017 (calendar icon)
- Description:** (empty text area)
- City of Purchase:** (empty text input)
- # of Days:** 5 (text input)
- Transaction Amount:** 0.00 (text input) with a currency dropdown set to USD
- Comment:** (empty text area)
- *Hard Code Amount 75:** 75 (text input)

3. CERN Lodging (allowable up to \$150/night):

- This expense type is used only if you are visiting CERN.
- Required fields: *Transaction Date*, and *# of Nights*.
- The transaction amount will be estimated for you here using the CERN reduced per diem amount.



A screenshot of a web form for 'CERN Lodging'. The form has a light gray background and contains several input fields. At the top left, there is a dropdown menu for 'Expense Type' with 'CERN Lodging (allowable up to \$150/nig)' selected. To its right is a date input field for 'Transaction Date' with '05/03/2017' entered. Further right is a large empty text box for 'Description'. Below the 'Expense Type' dropdown is a 'Transaction Amount' field with '0.00' and a currency dropdown set to 'USD'. To the right of the amount is a 'Comment' text box. At the bottom right is a '# of Nights' input field.

4. Lodging – Multiple Locations:

- This expense type is used if you are planning on staying at multiple places during your trip. Use this if you are staying in multiple cities.
- Required fields: *# of Nights*, and *Destination City*.
- The transaction amount will be estimated for you here based on the per diem rates of the *Destination City* that you select. You will submit the exact amount when you fill out your expense report after your trip.



Note: Fill out the *Lodging - Multiple Locations* expense for each place you stay at.



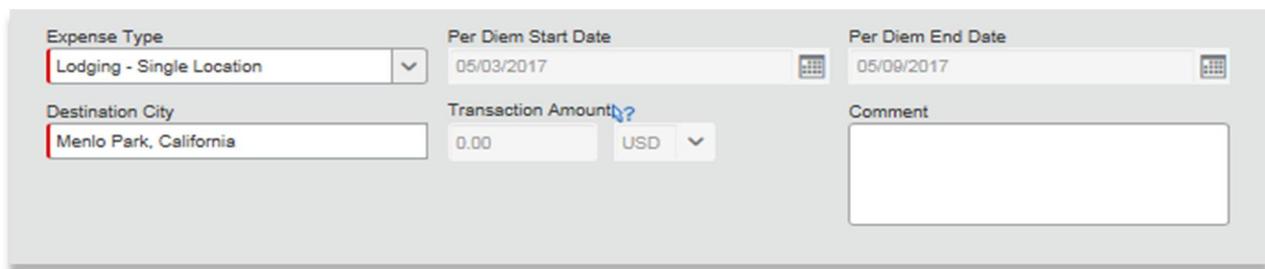
A screenshot of a web form for 'Lodging - Multiple Locations'. The form has a light gray background. At the top left, there is a dropdown menu for 'Expense Type' with 'Lodging - Multiple Locations' selected. To its right is an input field for '# of Nights' with '5' entered. Further right is an input field for 'Destination City' with 'Menlo Park, California' entered. Below the 'Expense Type' dropdown is a 'Transaction Amount' field with '0.00' and a currency dropdown set to 'USD'. To the right of the amount is a 'Comment' text box.

5. Lodging – Single Location:

- This expense type is used if you are only staying at one location for the duration of your trip.
- Required fields: *Destination City*.
- The transaction amount will be estimated for you here based on the per diem rates of the *Destination City* that you select. You will submit the exact amount when you fill out your expense report after your trip.



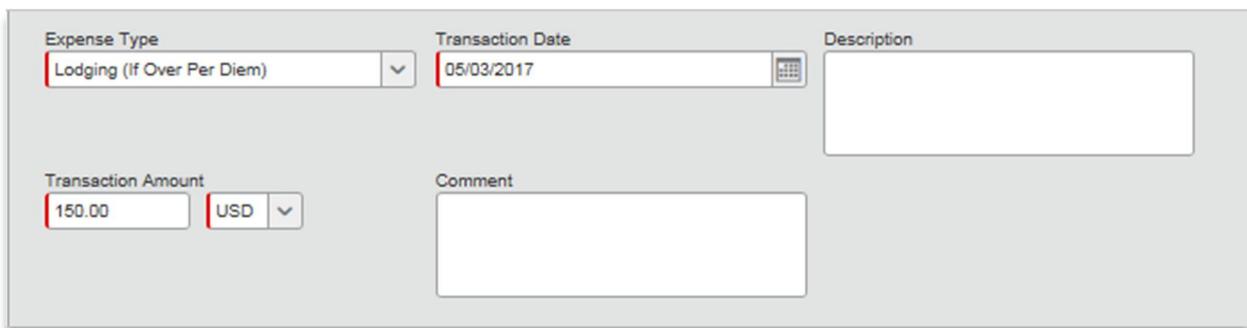
Note: The Per Diem Start and End Dates are already filled out for you for the duration of the trip based on the dates populated in the *Request Header* tab.



The screenshot shows a form for 'Lodging - Single Location'. The 'Expense Type' dropdown is set to 'Lodging - Single Location'. The 'Per Diem Start Date' is 05/03/2017 and the 'Per Diem End Date' is 05/09/2017. The 'Destination City' is 'Menlo Park, California'. The 'Transaction Amount' is 0.00 and the currency is USD. There is a 'Comment' field.

6. Lodging (If Over Per Diem):

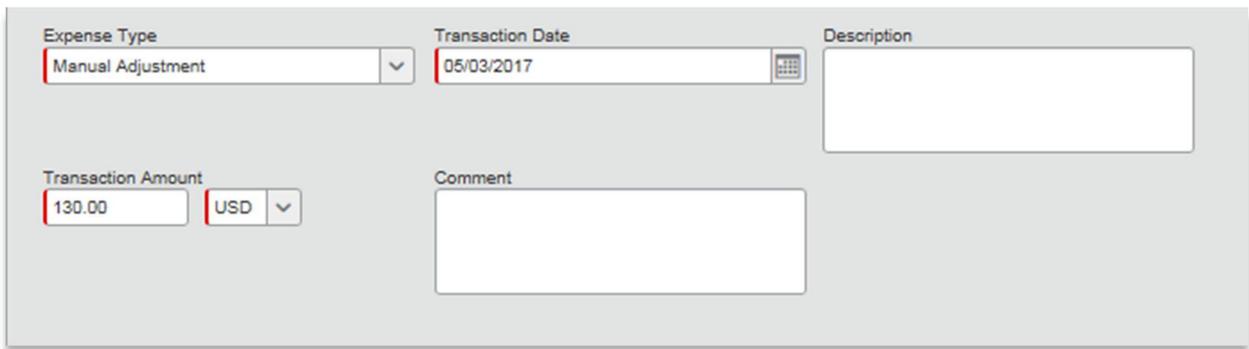
- This expense type is used if you are planning on lodging in a hotel that has rates higher than the per diem rate of the city you are staying in (i.e. conference lodging)
- Required fields: *Transaction Date*, and *Transaction Amount*.
- You will have to manually fill in the transaction amount, as well as select the proper currency for the trip.



The screenshot shows a form for 'Lodging (If Over Per Diem)'. The 'Expense Type' dropdown is set to 'Lodging (If Over Per Diem)'. The 'Transaction Date' is 05/03/2017. The 'Transaction Amount' is 150.00 and the currency is USD. There is a 'Description' field and a 'Comment' field.

7. Manual Adjustment:

- This expense type is used if you need to make adjustments to your final request totals. For example, when you know that the lodging is going to be significantly less than the automatically calculated per diem rates.
- Required fields: *Transaction Date*, and *Transaction Amount*.
- You will have to manually fill in the transaction amount, as well as select the proper currency for the trip.
- Add a *Description* stating why you would need a manual adjustment.



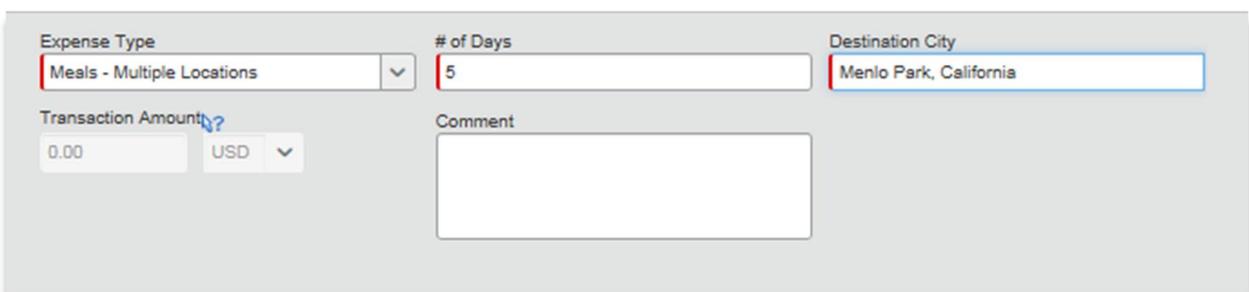
The screenshot shows a form for a 'Manual Adjustment' expense. The 'Expense Type' dropdown is set to 'Manual Adjustment'. The 'Transaction Date' is '05/03/2017'. The 'Transaction Amount' is '130.00' and the currency is 'USD'. There is a 'Description' text box and a 'Comment' text box, both of which are empty.

8. Meals – Multiple Locations:

- This expense type is used if you are planning on staying at multiple places during your trip. It is used for reimbursing your meals during travel.
- Required fields: *# Of Days*, and *Destination City*.
- The transaction amount will be estimated for you here based on the per diem rates of the *Destination City* that you select. You will submit the exact amount when you fill out your expense report after your trip.



Note: Fill out the *Meals - Multiple Locations* expense for each place you stay in.



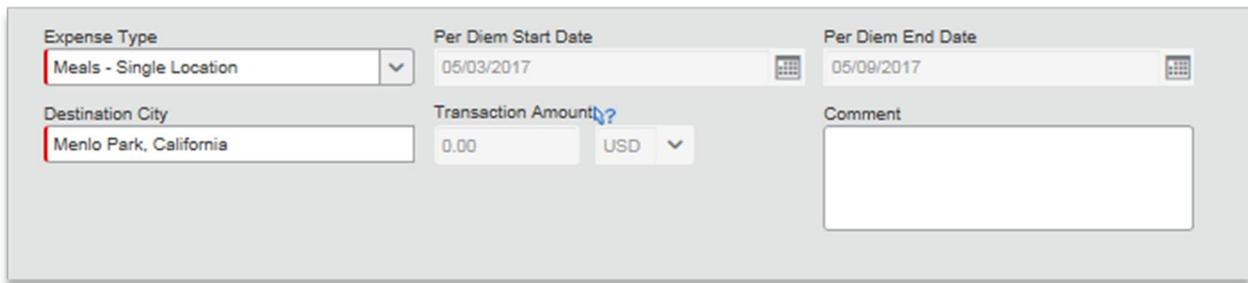
The screenshot shows a form for a 'Meals - Multiple Locations' expense. The 'Expense Type' dropdown is set to 'Meals - Multiple Locations'. The '# of Days' is '5' and the 'Destination City' is 'Menlo Park, California'. The 'Transaction Amount' is '0.00' and the currency is 'USD'. There is a 'Comment' text box, which is empty.

9. Meals – Single Location:

- This expense type is used if you are only staying at one location for the duration of your trip. It is used for reimbursing your meals during travel.
- Required fields: *Destination City*.
- The transaction amount will be estimated for you here based on the per diem rates of the *Destination City* that you select. You will submit the exact amount when you fill out your expense report after your trip.



Note: The Per Diem Start and End Dates are already filled out for you for the duration of the trip based on the dates populated in the *Request Header* tab.



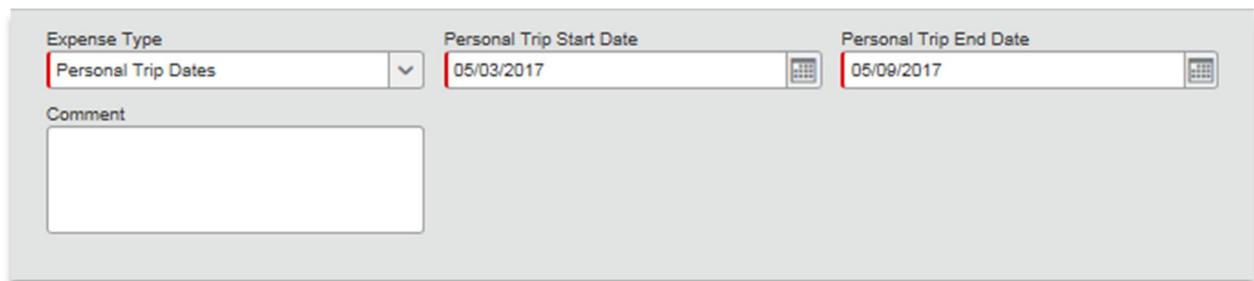
The screenshot shows a form for the 'Meals - Single Location' expense type. The 'Expense Type' dropdown is set to 'Meals - Single Location'. The 'Per Diem Start Date' is 05/03/2017 and the 'Per Diem End Date' is 05/09/2017. The 'Destination City' is 'Menlo Park, California'. The 'Transaction Amount' is 0.00 USD. There is a 'Comment' field.

10. Personal Trip Days:

- This expense type is used if you are planning on taking personal days during your business trip.
- Required fields: *Personal Trip Start Date*, and *End Date*.
- There is no transaction amount associated with this expense.



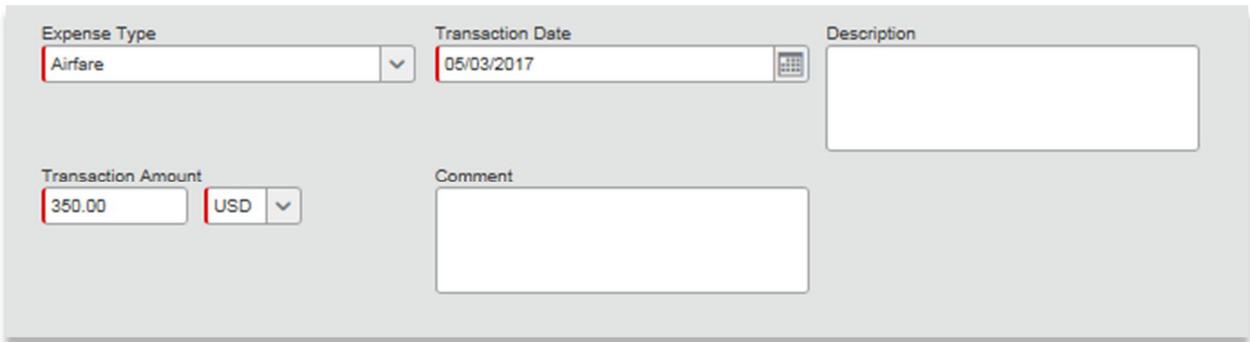
Note: While completing the Request Header, select **Yes** in the *Will this include personal travel?* drop-down.



The screenshot shows a form for the 'Personal Trip Dates' expense type. The 'Expense Type' dropdown is set to 'Personal Trip Dates'. The 'Personal Trip Start Date' is 05/03/2017 and the 'Personal Trip End Date' is 05/09/2017. There is a 'Comment' field.

11. Airfare:

- This expense is used if you are planning on traveling by air for your trip.
- Required fields: *Transaction Date*, and *Transaction Amount*.
- You will have to manually fill in the transaction amount, as well as select the proper currency for the trip.



A screenshot of a web form for recording an Airfare expense. The form is set against a light gray background. It contains several input fields: 'Expense Type' is a dropdown menu with 'Airfare' selected; 'Transaction Date' is a date picker showing '05/03/2017'; 'Description' is a large empty text box; 'Transaction Amount' is a text input with '350.00' entered; 'Currency' is a dropdown menu with 'USD' selected; and 'Comment' is a large empty text box.

12. Car Rental:

- This expense is used if you are planning on using a rental car during your trip.
- Required fields: *Transaction Date*, and *Transaction Amount*.
- You will have to manually fill in the transaction amount, as well as select the proper currency for the trip. This can be an estimate, as you will fill in the exact amount later after your trip.



Note: This expense should not be used to claim personal car miles. Those can be submitted under the *Mileage* expense type.



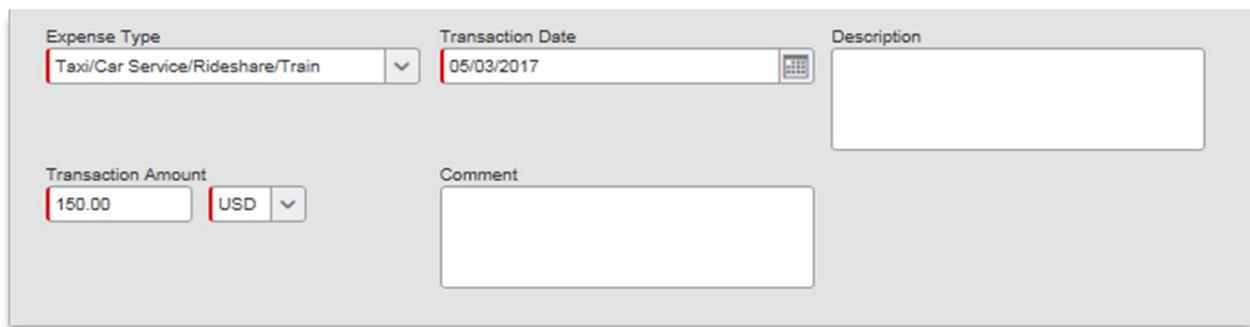
A screenshot of a web form for recording a Car Rental expense. The form is set against a light gray background. It contains several input fields: 'Expense Type' is a dropdown menu with 'Car Rental' selected; 'Transaction Date' is a date picker showing '05/03/2017'; 'Description' is a large empty text box; 'Transaction Amount' is a text input with '185.00' entered; 'Currency' is a dropdown menu with 'USD' selected; and 'Comment' is a large empty text box.

13. Taxi/Car Service/Rideshare/Train:

- This expense is used if you are planning on traveling by land, normally with a rental car, taxi service, or any other form of land transportation.
- Required fields: *Transaction Date*, and *Transaction Amount*.
- You will have to manually fill in the transaction amount, as well as select the proper currency for the trip. This can be an estimate, as you will fill in the exact amount later after your trip.



Note: This expense should not be used to claim personal car miles. Those can be submitted under the *Mileage* expense type.



The screenshot shows a form with the following fields:

- Expense Type:** A dropdown menu with "Taxi/Car Service/Rideshare/Train" selected.
- Transaction Date:** A date field with "05/03/2017" entered and a calendar icon.
- Description:** A large empty text box.
- Transaction Amount:** A text box with "150.00" entered, followed by a currency dropdown menu with "USD" selected.
- Comment:** A large empty text box.

14. Training/Registration:

- This expense is used if you are going to a conference and need reimbursement for the registration fee, or have a reimbursable fee for attending a training event.
- Required fields:
 - *Conference Start Date*
 - *Event Name*
 - *Event Role*
 - *Transaction Amount*
 - *Event Website*
 - *Addtl Info (2000 char. limit).*
- You will have to manually fill in the transaction amount, as well as select the proper currency for the payment. Enter the exact amount if you know what the registration/training fee will be, otherwise do your best to estimate it, as you will fill in the exact amount later after your trip.

Expense Type Training/Registration	Conference Start Date 05/03/2017	Destination City Menlo Park, California
Event Name *DOE Conference 1	Event Name (If not on list)	Event Role Attendee
Transaction Amount 135.00 USD		
Event Website & Addtl Info (2000 char. limit) www.eventwebsite.com		



Note: While completing the Request Header, select **Yes** in the *Will you be attending a conference?* drop-down.

15. Mileage:

- This expense is used if you are going to be using your personal car to drive somewhere during your trip, usually to or from the airport.
- Required fields: *Transaction Date*.
- The transaction amount will be calculated for you for this category, as it is based off of distance traveled by you.

Note: Include a distance estimate when you fill this out, it is unlikely to change and can give you a good estimate for when you fill out your expense report after your trip.

Expense Type 05. Mileage	Transaction Date 05/03/2017	Distance 46
Mileage Rate 0.54	Description	Amount 0.00 USD
Comment		