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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.
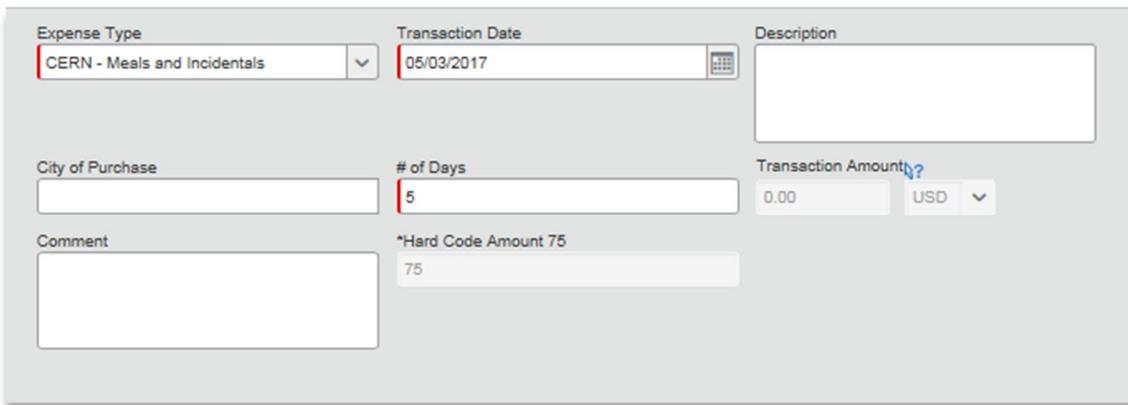
Expense Type	Segment Start Date	Segment End Date
Trip Segment(s) [*REQUIRED]	05/03/2017	05/09/2017
Business Location	**Country**	**Primary Purpose**
Menlo Park, California	UNITED STATES	Experiments
Justify Trip Purpose		

2. *CERN – Meals and Incidentals:*
   - This expense type is used only if you are visiting CERN.

   - Required fields*: Transaction Date, and # of Days.*

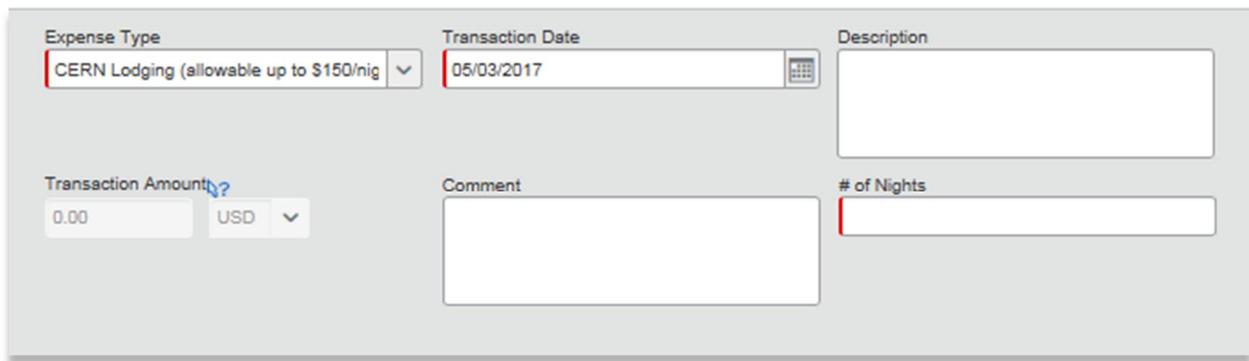   - The transaction amount will be estimated for you here using the CERN reduced per diem amount.

Expense Type	Transaction Date	Description
CERN - Meals and Incidentals	05/03/2017	
City of Purchase	**# of Days**	**Transaction Amount**
	5	0.00 USD
Comment	***Hard Code Amount 75**	
	75	

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.

Expense Type	Transaction Date	Description
CERN Lodging (allowable up to $150/nig ∨	05/03/2017 📅	
Transaction Amount ?	**Comment**	**# of Nights**
0.00 USD ∨		

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.

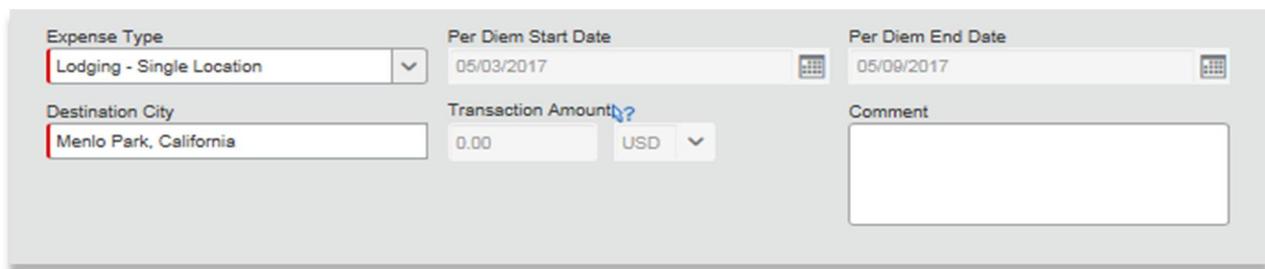   **Note**: Fill out the *Lodging - Multiple Locations* expense for each place you stay at.

Expense Type	# of Nights	Destination City
Lodging - Multiple Locations ∨	5	Menlo Park, California
Transaction Amount ?	**Comment**	
0.00 USD ∨		

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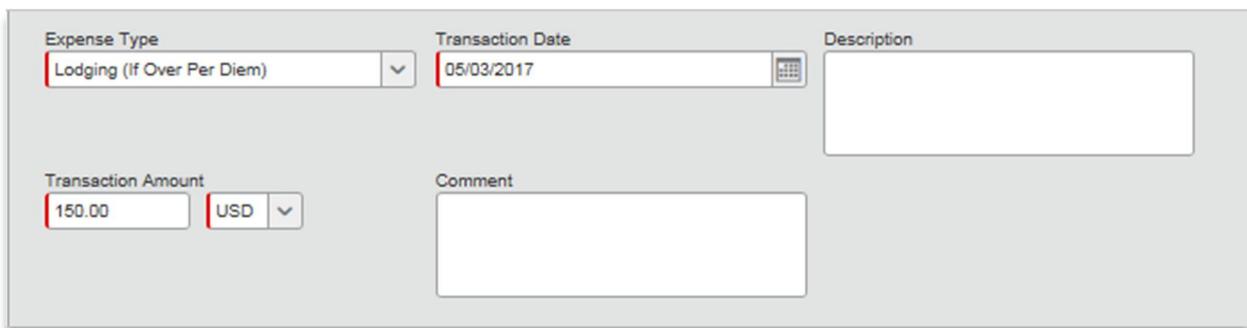
      > **Note:** The Per Diem Start and End Dates are already filled out for you for the duration of the trip based on the dates populated in the *Request Header* tab.


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.

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.
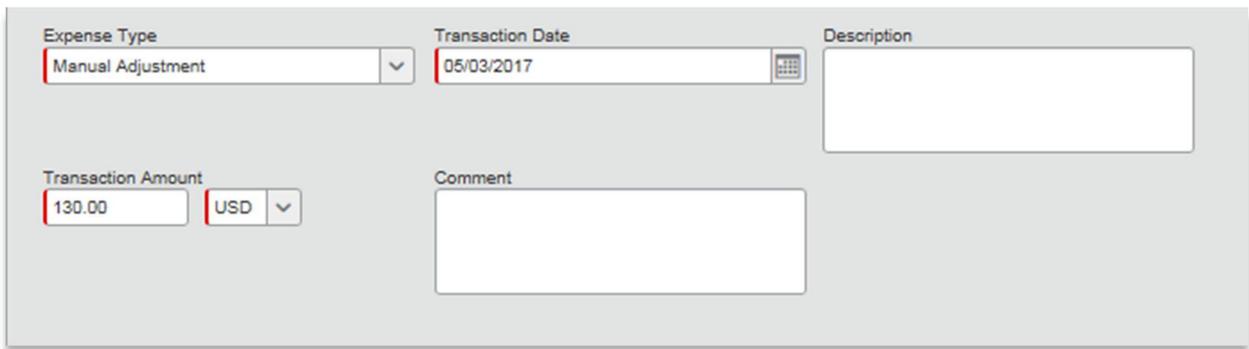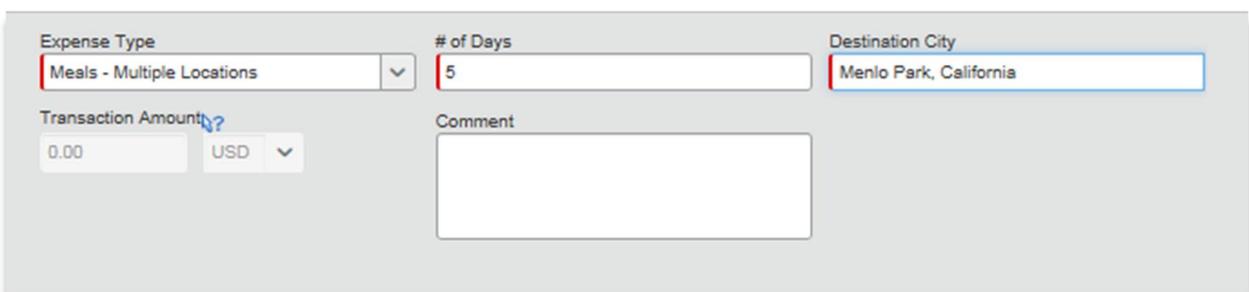

8. *Meals – Multiple Locations*:
   - This expense type is used if you are planning on staying at multiple places during your trip. It is used for reimbursing your meals during travel.

   - 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.

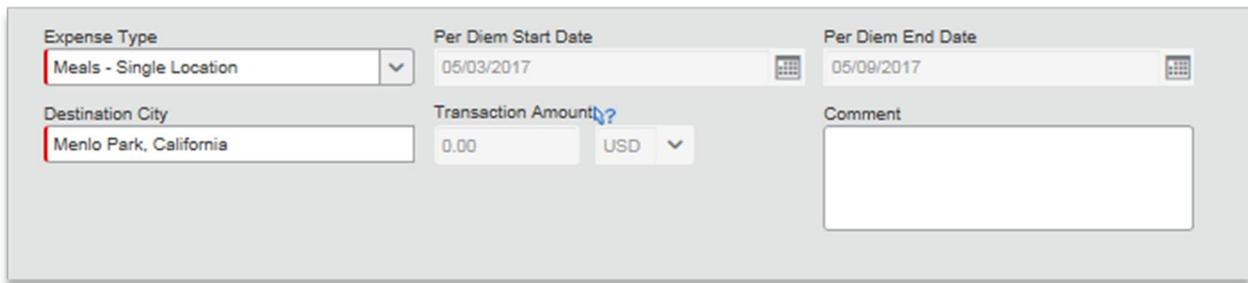   **Note:** Fill out the *Meals - Multiple Locations* expense for each place you stay in.

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.
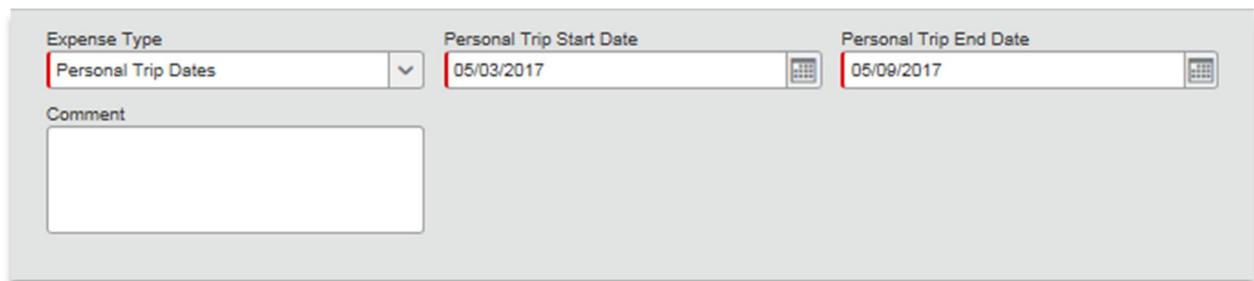

10. *Personal Trip Days:*
    - This expense type is used if you are planning on taking personal days during your business trip.

    - Required fields: *Personal Trip Start Date*, and *End Date*.

    - There is no transaction amount associated with this expense.
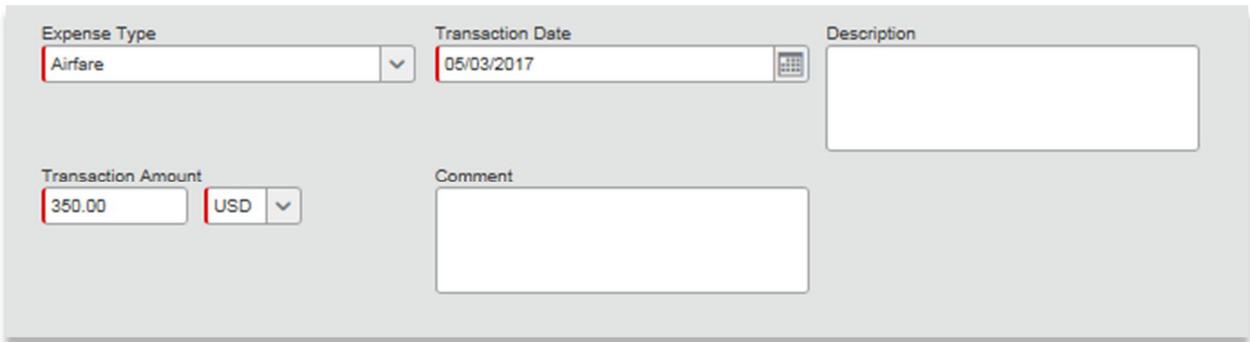
        Note: While completing the Request Header, select **Yes** in the *Will this include personal travel?* drop-down.

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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.

Expense Type	Transaction Date	Description
Airfare	05/03/2017	

Transaction Amount	Comment
350.00 USD	

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.
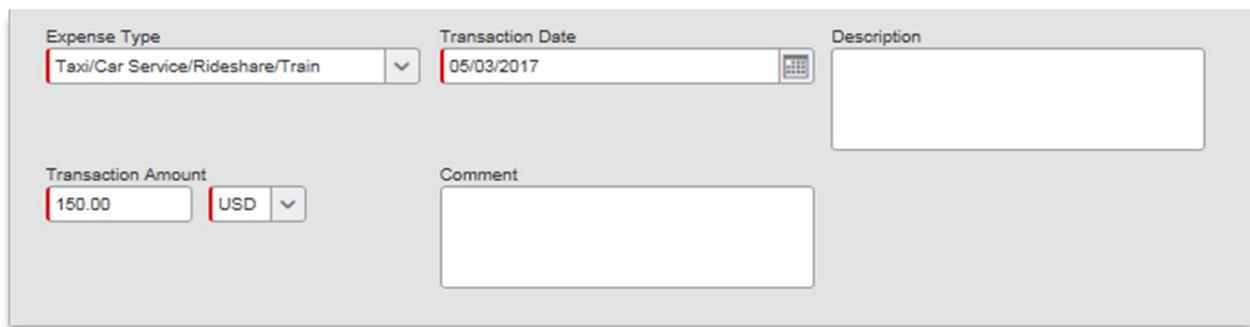
Expense Type	Transaction Date	Description
Car Rental	05/03/2017	

Transaction Amount	Comment
185.00 USD	

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.

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.

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> **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.