Local Travel Expense Report

Introduction

This supplement is intended for Travelers who use MyTravel to support their official travel in the local area of their Permanent Duty Station. It builds on the information available in the *Create and Submit Expense Report* section of the *MyTravel Quick Start Guide for Travelers*, which explains how to create expense reports in support of TDY travel. If you are using an online version of this supplement, selecting the links in it will take you directly to other resources, though if needed, you'll find the applicable URLs at the very end of this guide.

Note: For best results, use the Chrome browser to access MyTravel.

How TDY and Local Travel Processes Differ in MyTravel

The TDY travel process in MyTravel has two steps:

1. Create a trip request to provide trip cost estimates and get approval to travel.
2. Create an expense report to request reimbursement for official travel-related expenses you incurred and payment for travel allowances you earned.

For local travel, you usually don't need to create a trip request. Instead, you skip that step and only create an expense report. This supplement explains how that process works – and explains when you need to use a slightly different process.

Create the Expense Report

To create a MyTravel expense report to support local travel:

1. Log into MyTravel. The MyTravel home screen (Figure 1) opens.

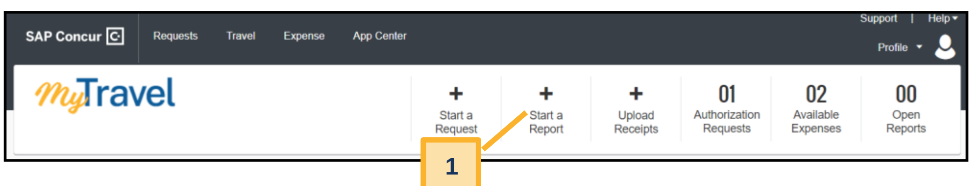

Figure 1: MyTravel Home Screen (top)

2. Near the top of the screen, select **Start a Report** (Figure 1, indicator #1). The **Create New Report** screen (Figure 2) opens with the TDY expense report header screen fields displaying by default.

Create the Expense Report *(continued)*

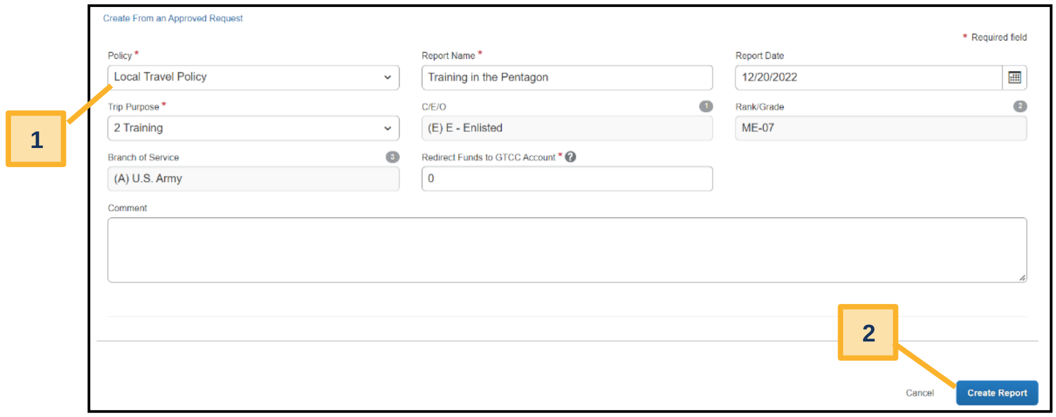

Figure 2: Create a New Expense Report Screen

3. Select **Local Travel Policy** from the **Policy** field drop-down menu (Figure 2, indicator #1). The screen refreshes to display the local travel expense report layout seen in Figure 2. Table 1 highlights some of the key fields you'll need to complete on the **Create New Report** screen.

Table 1: Create a New Expense Report Screen Options for Local Travel

Field	Notes
Policy	You must select **Local Travel Policy**. If you are following these instructions, you already did this.
Report Name	Enter a name of your choice, unless local or Component policy dictates the field's contents.
Report Date	Defaults to today, but you can change it.
Trip Purpose	Select an option from the drop-down menu. Again, your local or Component policy may direct a choice.
Redirect Funds to GTCC Account	Enter the costs of GTCC transactions that aren't anywhere else in the expense report (e.g., meals).
Comment	Comments are optional unless mandated by local or Component policy.

Note: You cannot claim a travel (M&IE) allowance if you are using the local travel expense report. If you meet one of the exceptions that allows you to claim M&IE during local travel, you must follow the typical TDY request and expense report processes.

Create the Expense Report *(continued)*

4. Select **Next** (Figure 2, indicator #2). MyTravel creates your local travel expense report and opens it on the **Expenses** screen (Figure 3). When first created, there will be no expenses listed. Select **Add Expense** (Figure 3, indicator #1; more below) to create as many as needed.

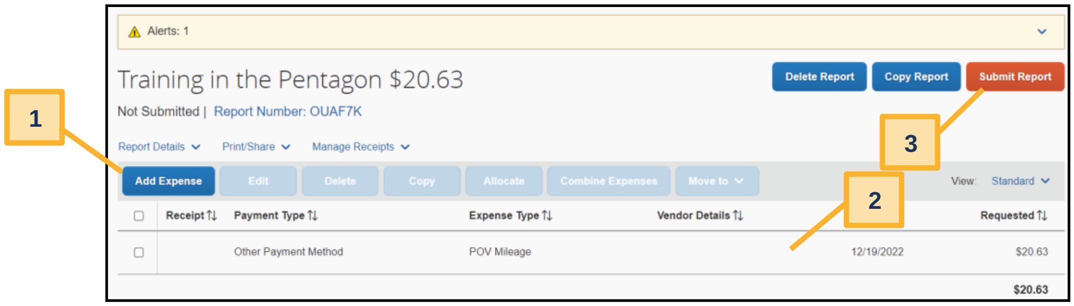

Figure 3: Expenses Screen

Expenses Screen Layout and Functions

From this point forward, the expense report works generally the same way a TDY expense report works. Brief instructions are provided below, but you can find more detailed information in the *MyTravel Quick Start Guide for Travelers*. On the **Expenses** screen, use the buttons and links (listed as they appear on the screen from top to bottom) to:

- **Delete**, **Copy**, or **Submit** the report for approval.
- View other document screens by selecting **Report Details** then choosing the screen you want to visit (*=view-only screen; you can't make changes to it):
  - **Report Header** opens the **Report Header** screen, where you can designate additional funds to go to the GTCC vendor to pay off your GTCC account.
  - ***Report Totals** shows the total payment claim and the total by categories.
  - ***Report Timeline** tracks the document's approval progress.
  - ***Audit Trail** tracks all document actions – reservations, submissions, approvals, returns, etc.
  - ***Allocation Summary** shows lines of accounting (LOAs) and the amounts distributed to each one (more on LOAs and allocations below).
  - ***Manage Requests** lets you link a trip request to this document. Never do this on a local travel expense report.
- **Print/Share** lets you print or email the document.
- **Manage Receipts** lets you add, view, remove, or attach receipts and other documents. Remember that receipts are required for all lodging expenses and any expense $75 or more.
- Buttons let you **Add**, **Edit**, **Delete**, **Copy**, **Allocate**, **Combine**, or **Move** expenses.
- The list of individual expenses (Figure 3, indicator #2) provides the key details of each expense. View an expense's full details and attached receipts by checking the box next to an expense, then selecting **Edit**.

Add Expenses

As mentioned above, the **Expenses** screen initially displays no claimed expenses. Add them by selecting **Add Expense** (Figure 3, indicator #1). The **Add Expense** screen (Figure 4) opens.

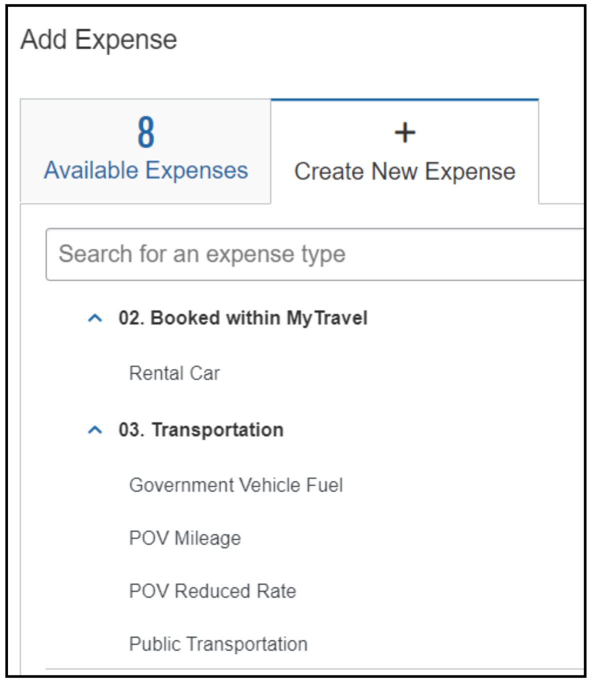

Figure 4: Add Expense Screen, Create New Expense Tab

1. If you have any available expenses, you can import them from the **Available Expenses** tab. Just select the tab, select all the available expenses you want to add, and select **Add to Report**. That's all there is to it.
2. More commonly, you'll use the **Create New Expense** tab. It provides a list of all available expense types, as shown on Table 2. After you select an expense, enter all of the mandatory details (they vary by expense type) and as many of the optional ones as you want to, add a receipt if needed, then select **Save Expense**.

Table 2: Available Expenses on Local Travel Expense Report

Expense Type	Expense	Notes
02. Booked within MyTravel	Rental Car	Use to claim rental car costs, no matter how you booked
03. Transportation	Government Vehicle Fuel	
	POV Mileage	
	POV Reduced Rate	Use when a GOV is available, but you use your POV instead.
	Public Transportation	Examples: buses, ferries
	Rental Car Fuel	

Add Expenses (continued)

	Taxi/Car Service	Examples: taxis, ride sharing
	TDY Parking	Use for local parking expenses
	Tolls	
04. Lodging	Occasional Lodging	Use when the need for lodging was not expected, but is allowed by the JTR
05. Meals	Occasional Meal	Use when the need for M&IE was not expected, but is allowed by the JTR
	Snack - Recruiter	Only use if you are a recruiter (generates a flag)
06. Other	Conference Registration Fee	
08. International Related Expenses	Foreign Currency Conversion Fees	

Add LOAs and Allocate Expenses

Use the **Allocate** screen (Figure 5) to add one or more LOAs to the expense report. An LOA identifies the source of the funds that will pay for the trip. If you add more than one LOA, you can also allocate the trip costs – by dollar amount or percentage – to the selected LOAs.

To get to the **Allocate** screen, select any expense on the **Expenses** screen (Figure 3) then select **Allocate** on the row of buttons (Figure 3, indicator #1).

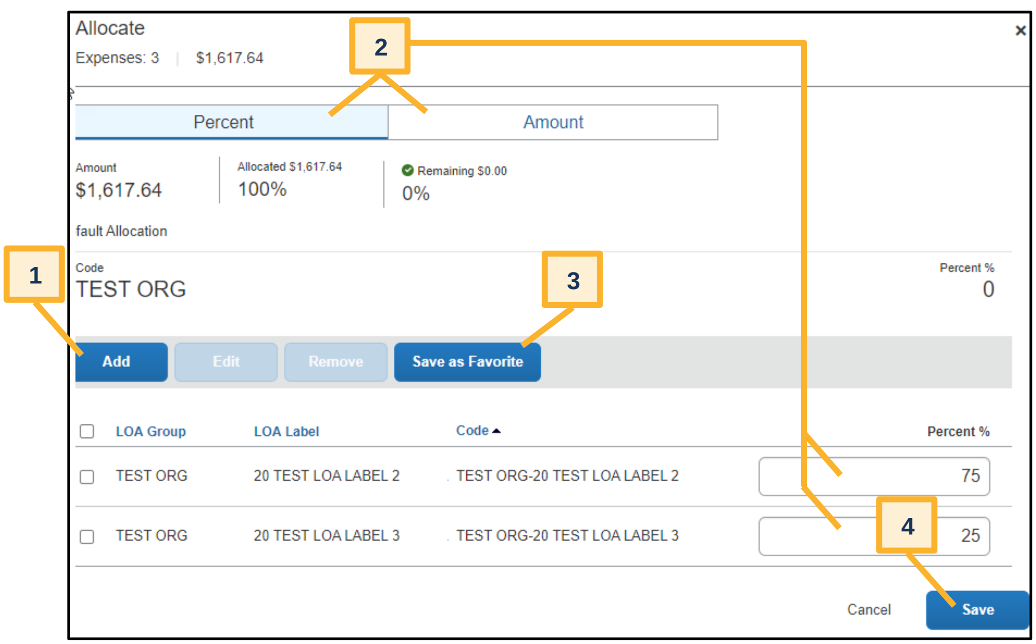

Figure 5: Allocate Screen

Add LOAs and Allocate Expenses *(continued)*

The **Allocate** screen lets you (list numbers equate to indicator numbers on Figure 6):

1. **Add**, **Edit**, or **Remove** an LOA. All involve secondary actions such as identifying the LOA you want to add (Figure 5), updating any incorrect information, or acknowledging a removal.
2. Allocate expense costs between LOAs by **Percent** or **Amount** if you added multiple LOAs to your trip request.
3. Select **Save as Favorite** to create a short list of LOAs or LOA combinations that you use frequently. On subsequent trips, you can use the **Favorite Allocations** tab (Figure 6, indicator #1) to quickly find your favorite LOAs and LOA combinations.

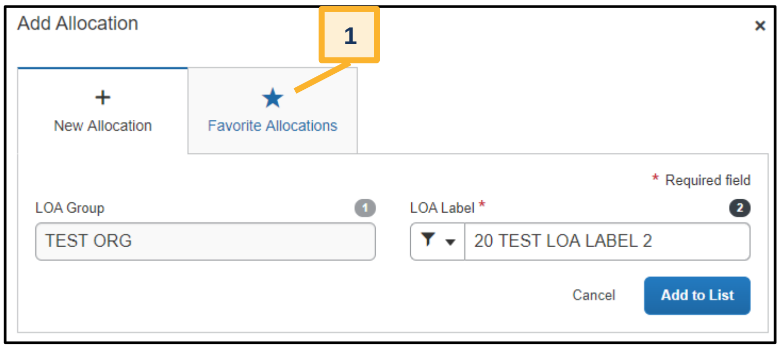

Figure 6: Add Allocation Screen

4. Select **Save** on the **Allocate** screen to close the screen and return to the **Expenses** screen.

Note: If you want to allocate expenses to LOAs by expense type or date, on the **Expenses** screen (Figure 14), check the box to the left of every expense you want to charge to a single LOA, then select **Allocate** and assign the appropriate LOA as explained above. Repeat that process until you've included every LOA that you need to use and allocated all of your expected expenses.

Submitting the Expense Report

After you finish entering and allocating expenses and the expense report is fully accurate, you can submit it for approval (Figure 3, indicator #4). In truth, this item is no different than a TDY expense report, but the following additional considerations apply for local travel:

1. You may enter expenses on future days, but you must wait to submit the expense report for approval until on or after the last day entered for any expense.
   a. **Example:** Today is May 7, but you added an expense you know you will incur on May 9. You will be able to submit the expense report for approval on or after May 9.
2. You may create the expense report, add expenses as you incur them, and submit for approval after entering the last one you want to claim on this expense report.
   a. **Example:** You create a local travel expense report on May 1. You perform official travel on May 7, 11, 22, and 24, and enter expenses on each of those days. After you enter your expenses on May 24, you submit the expense report for approval.
3. All expenses on an expense report must be incurred in a single fiscal year.

Additional Resources

The items on this list provide the URLs for additional information you may find useful. Some of them are mentioned elsewhere in this guide.

1. Vendor-created User Guides and Demonstrations

   https://www.concurtraining.com/toolkit/en/expense/end-user/ui02

2. MyTravel direct link

   https://dodtravel.concursolutions.com

In addition, you can find many helpful user guides and other informational papers:

- On the DTMO website's **MyTravel** screen at https://travel.dod.mil/Programs/DoD-Travel-Systems/MyTravel/
- By logging onto MyTravel at the link in #2 above, then selecting **Help** in the upper right corner of the screen, then **Training** on the drop-down menu.