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**CU Concur Tip: How do I itemize a meal expense?**

## What is it?

Except under rare circumstances, meals to be reimbursed should not exceed the following thresholds, excluding tip and tax: \$25 for breakfast, \$35 for lunch, and \$75 for dinner.

- If your total individual meal expense, including tip and tax, exceeds the meal threshold, you can itemize the expense to exclude the tip and tax.  
For group meals, Concur uses the number of attendees to calculate whether the per person amount exceeds the individual meal thresholds. Concur provides a field to enter the tip and tax for group meals. You can also itemize the tip and tax. Refer to the [Expensing Group Meals in Concur](#) training guide for more details.
- If your meal included alcohol, the total cost of food and alcohol must be within the allowable meal threshold. You must segregate the amount spent on alcohol by itemizing the meal expense.
- If you purchased any items for which you are not requesting reimbursement or are personal/non-reimbursable, you can itemize the meal expense to exclude the amount.
- If you exceeded the meal threshold, excluding tip and tax, you must segregate the amount over threshold by itemizing the meal expense and provide justification. Senior Business Officer approval is required and Concur has been configured to route reports accordingly.

## Who's it for?

Payees who are submitting Expense Reports with meal expenses requiring itemization.

## How do I do it?

In this example, an expense of \$100 was incurred for an individual dinner, which included alcohol. The cost of food was \$70 and alcohol was \$10, totaling \$80, which exceeds the \$75 threshold by \$5. Tip and tax totaled \$20. The steps below detail how to itemize this meal expense:

1. In your Expense Report, enter the meal expense as pictured below:

The screenshot shows the 'New Expense' form in SAP Fiori. The 'Details' tab is active, and the 'Itemizations' tab is highlighted with a red box. The form contains the following fields:

- Expense Type: Individual Meal - Dinner
- Transaction Date: 06/11/2021
- Trip Type: Domestic / Non-Travel
- Purpose: Conference
- Was alcohol purchased?: Yes
- Payment Type: Cash/Personal Credit Card
- Amount: 100.00
- Currency: US Dollar

Buttons at the bottom include 'Save Expense', 'Save and Add Another', and 'Cancel'. A 'Receipt' image is displayed on the right side of the form.

2. Click the Itemizations tab.

The screenshot shows the 'Itemizations' tab of the 'New Expense' form. The total amount is \$100.00. The 'Meals - Dinner' section is expanded, showing the following items:

- Individual Meal - Dinner: 65.00
- Alcoholic Beverages - Dinner: 10.00
- Tax/Tip/Gratuity - Dinner: 20.00
- Meal Segregated - Dinner: 5.00
- Personal Expense (do not reimburse):

Buttons at the bottom include 'Save Itemizations' and 'Cancel'. A 'Receipt' image is displayed on the right side of the form.

3. Enter the Alcoholic Beverage amount (\$10 in this example).

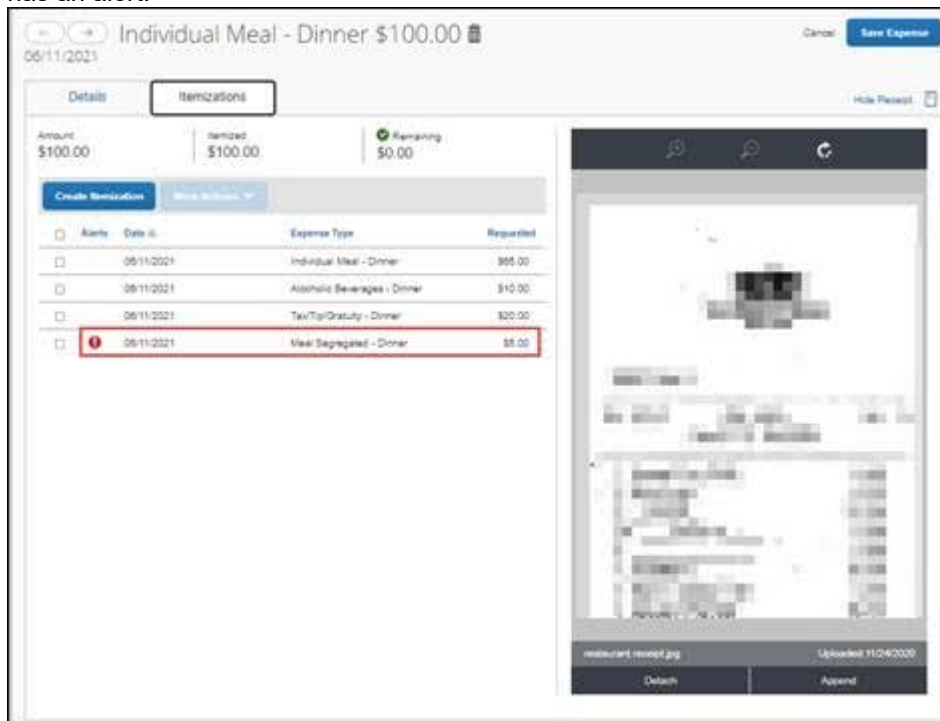
4. Enter the Individual Meal amount. The total of alcohol and meal must be equal to or under the meal threshold. (In this example, we must enter \$65 to be within the \$75 dinner threshold.)

5. Enter the Tax/Tip/Gratuity amount (\$20 in this example).

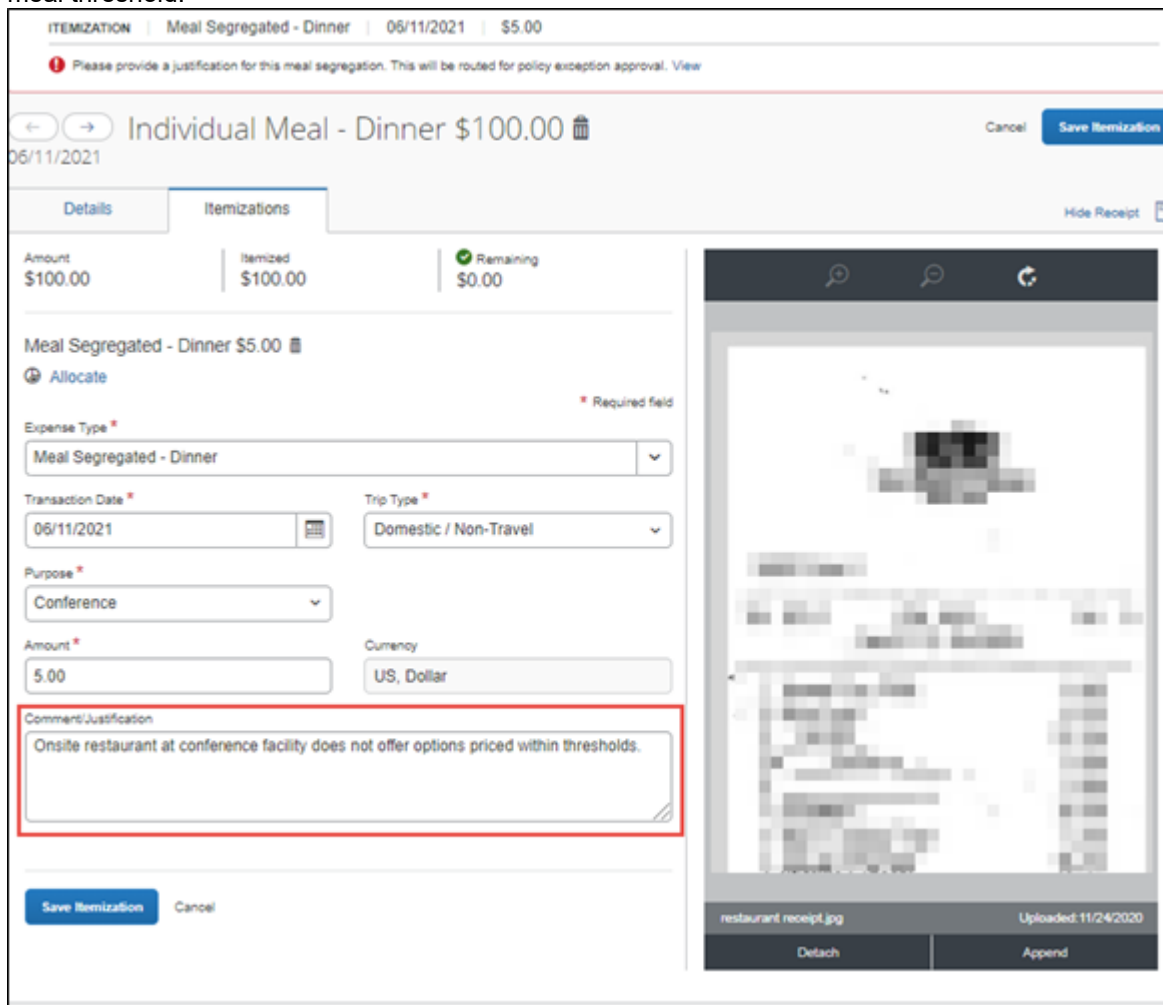
6. Enter the Meal Segregated amount, which is the remaining amount of the total not accounted for (\$5 in this example).

If you purchased any items for which you are not requesting reimbursement or are personal/non-reimbursable, enter the amount in the Personal/Non-Reimbursable field.

7. Click the Save Itemizations button. The itemizations are listed. Notice that the Meal Segregated itemization has an alert.



8. Click the row for the Meal Segregated itemization and enter a Comment/Justification for exceeding the meal threshold.



9. Click the Save Itemization button and then click the Save Expense button to save the meal expense to your Report.

Where do I get help?

Please contact the Finance Service Center

<http://finance.columbia.edu/content/finance-service-center>

You can log an incident or request a service via Service Now

<https://columbia.service-now.com>

You are receiving this e-mail because you have an active Concur profile for purposes of travel and business expense management; anyone with an active Concur profile will receive communications from [cutravelandexpense@columbia.edu](mailto:cutravelandexpense@columbia.edu) or [financetraining@columbia.edu](mailto:financetraining@columbia.edu) when we need to share important information pertaining to Concur system accessibility, enhancements, or relevant information and guidance. If you do not feel you need a Concur profile going forward, please speak with your Departmental Administrator or School Senior Business Officer, and they will assist with the removal of your access, if appropriate.

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