Travel & Expenses – Mileage Expense Report

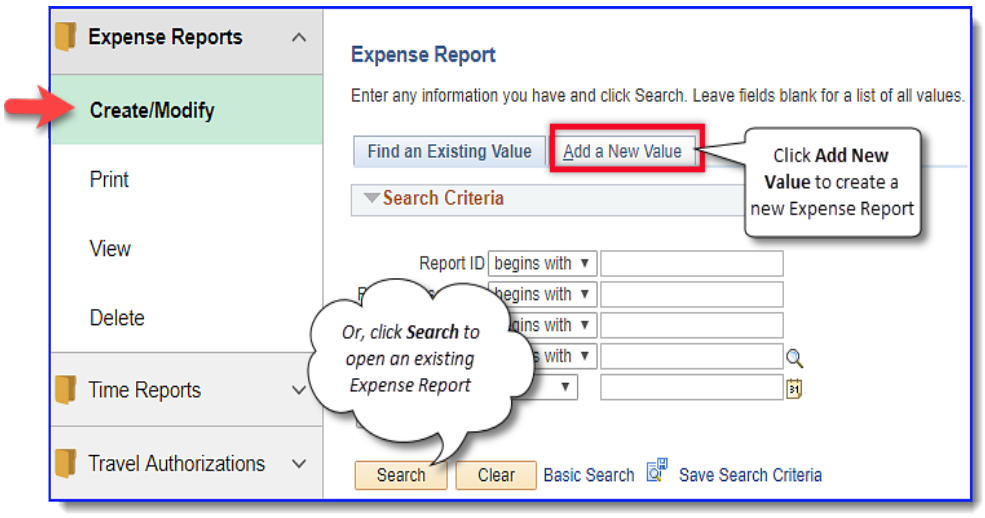
Version 2.1 • Updated Feb 2024

Reimbursement for mileage put on a private vehicle, when required for work related travel within SDUSD must be requested through a PeopleSoft Expense Report. Only certain employees can apply for mileage reimbursement, and only under certain circumstances. Please check with your department approver/ principal to determine eligibility.

IMPORTANT! Eligible employees must submit separate Expense Reports for Mileage each month in which you want to submit a claim. Reports **cannot** include days from more than one month. Employees should create and submit their own mileage reports to ensure accuracy and timely receipt of reimbursement.

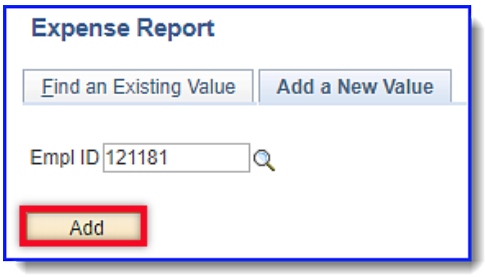
How to submit a Mileage Expense Report

1. Log in to PeopleSoft Financials using your Empl ID and password.
2. On the **Homepage**, select **Travel and Expenses**.
3. Select **Expense Reports**.
4. Select **Create/Modify.**
5. Click **Add a New Value t**o create a new report.



Your Employee ID number should display. If it is blank, contact Human Resources and request access to create travel forms. (If creating a mileage claim for someone else, use the search feature to select from list)

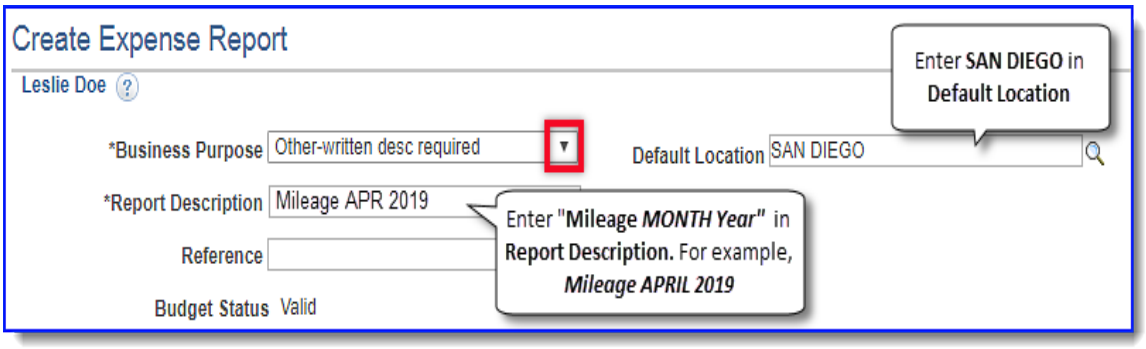
6. Click **Add**.



7. Complete the **Create Expense Report** page (**Note**: **Asterisk *** indicates a required field)

Header:

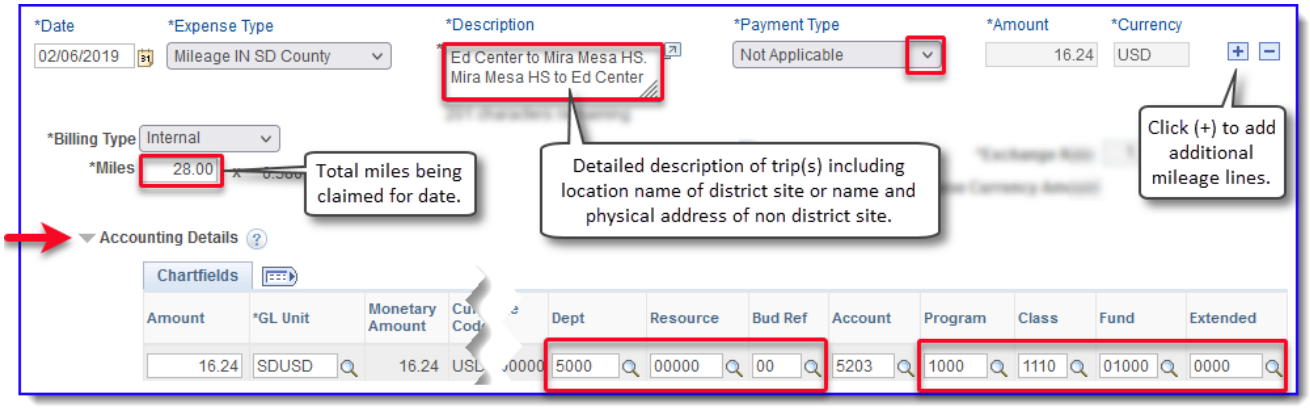
- **Business Purpose:** Select **Other-written desc required** from drop-down.
- **Report Description:** Enter **Mileage Month /Year**. For example *"Mileage APRIL 2019"* to describe a single month of mileage claims
- **Default Location:** Enter **San Diego**



Expenses:

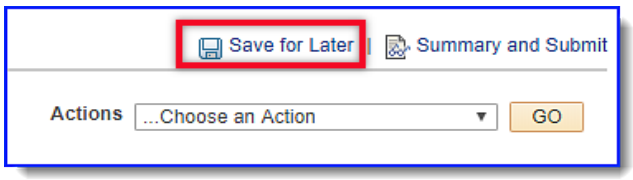
- **Date:** Enter date of mileage expense.
- **Expense Type:** Select **Mileage IN SD County**
- **Description:** Include all sites traveled to **on** this date.
  - If traveled between two district sites enter location names, for example "*From Ed Center to Mira Mesa High school".*
  - If the to/from location is *not* a district-site, include the **location name and physical address**.
- **Payment Type:** Select **Not Applicable** from drop-down.

- **Miles:** Enter the total (rounded) number of miles being claimed for the date. Try using Google Maps or MapQuest to calculate actual distances.
- **Accounting Details:** Click expand icon. Enter budget string in chartfields **DeptID, Resource, Bud Ref, Account, Program, Class, Fund** and **Extended.** ***Important!*** Chartfield displayed in image below is fictitious and should **not** be used.
- Click **Insert Lines icon (+)** to add an expense line for another day, if necessary.



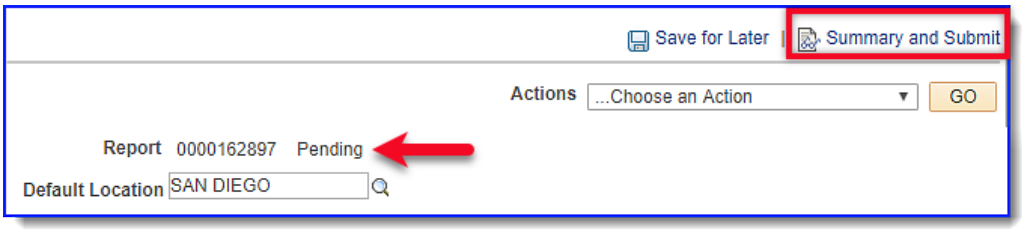
Repeat the Expenses section of Step 7 to claim mileage for additional days during the month.

8. When finished, click **Save for Later**.

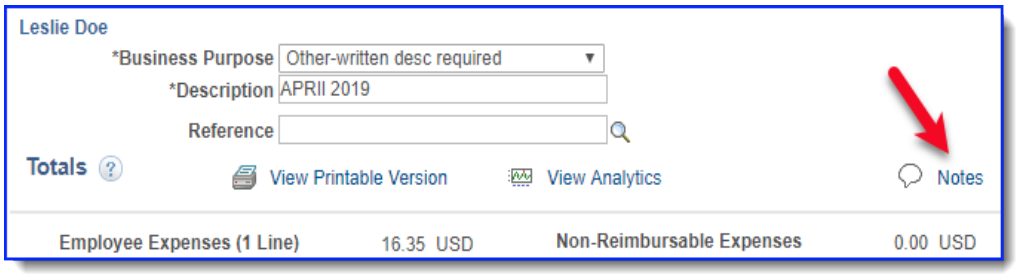


Important! A red flag will appear if missing or invalid information was found. Click on flag to view the error. Areas that need your attention will be highlighted in **RED**. You can save this Mileage Expense Report with missing or invalid information; however, you cannot submit it for approval until it is error free.

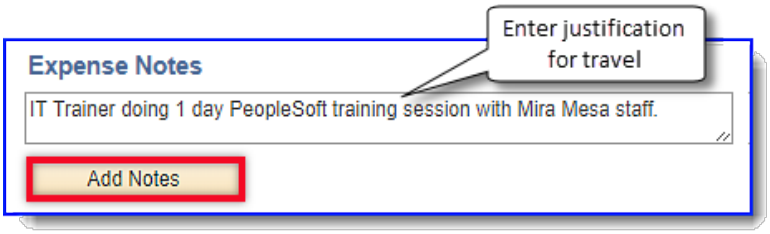
9. Click **Summary and Submit**.



10. Click **Notes.**

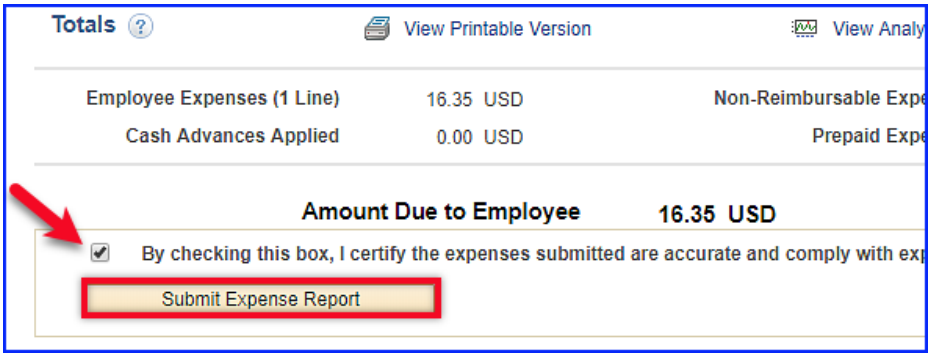


11. Enter note justifying the claim. Include position title and purpose of the visit(s). For example, "*Audiologist, performing hearing tests at Mira Mesa High*". Click **Add Notes**.

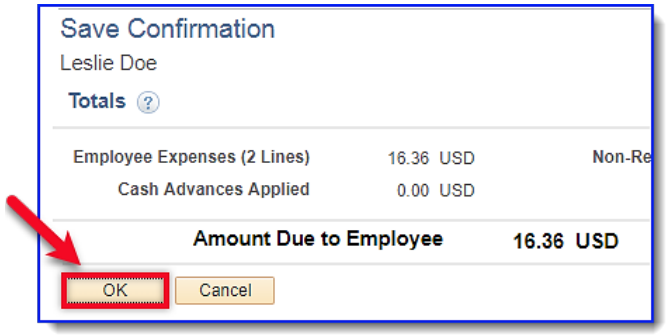
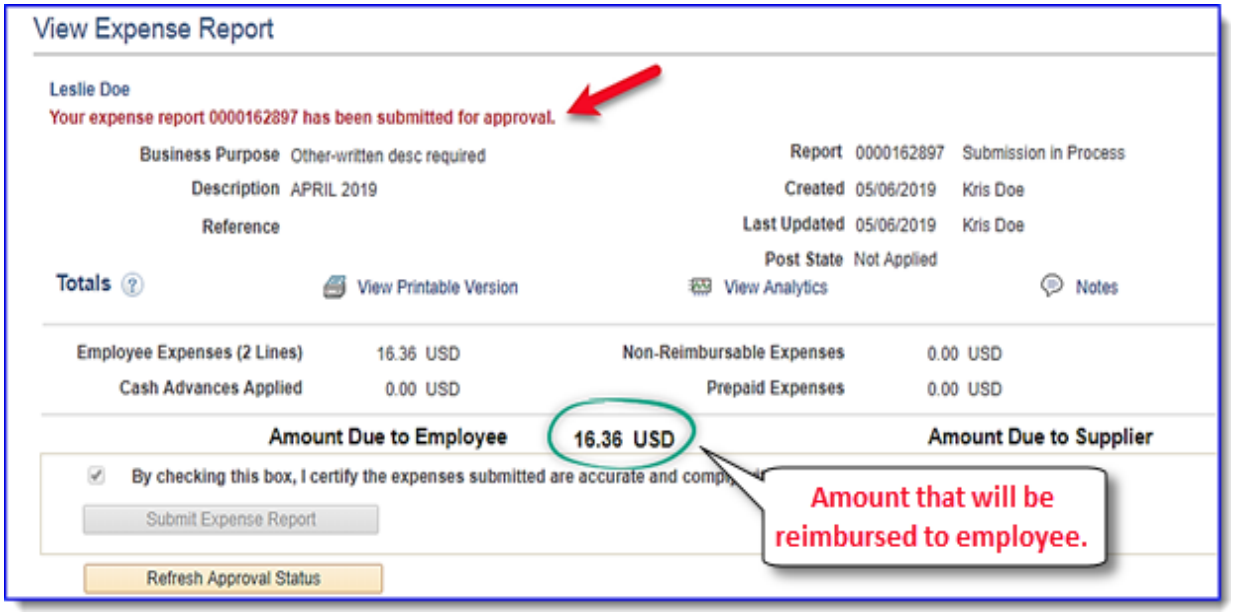


12. Click **OK**.

13. On the **Create Expense Report page**, check the **Certification box**. Then click **Submit Expense Report**.



14. Click **OK** to confirm submission.



The confirmation page will display a "…submitted for approval" message. Notate the approved amount for reimbursement.