

Travel & Expenses – Mileage Expense Report

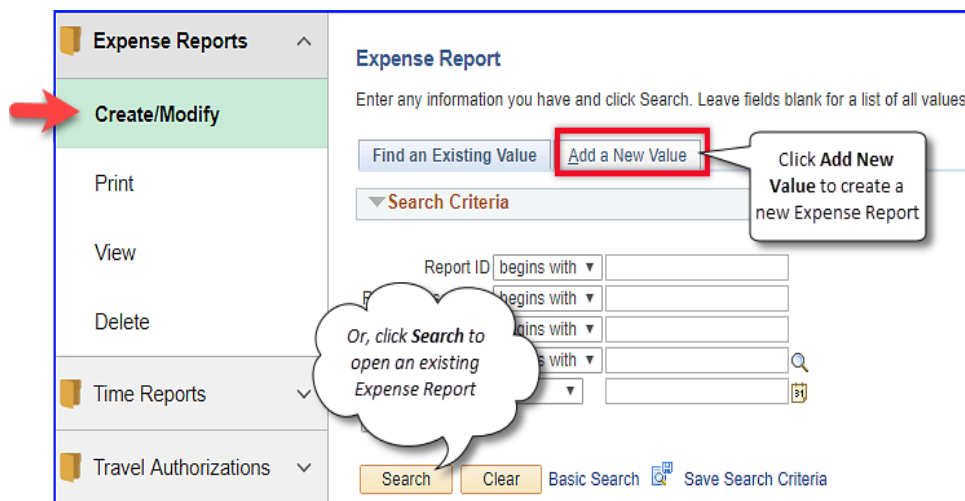
Version 2.1 • Updated Feb 2024

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.

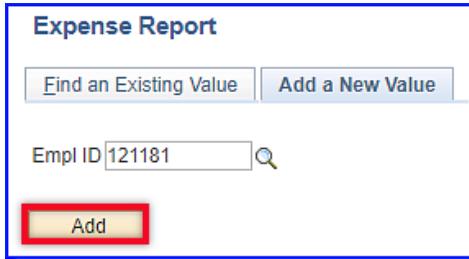
How to submit a Mileage Expense Report

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** to 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)

- Click **Add**.



Expense Report

Find an Existing Value Add a New Value

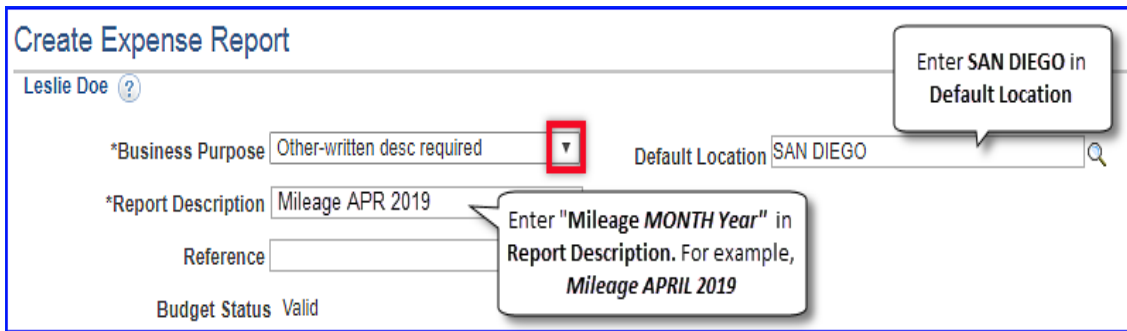
Empl ID 🔍

Add

- 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**



Create Expense Report

Leslie Doe ?

*Business Purpose ▼ Default Location 🔍

*Report Description Enter "Mileage MONTH Year" in Report Description. For example, Mileage APRIL 2019

Reference

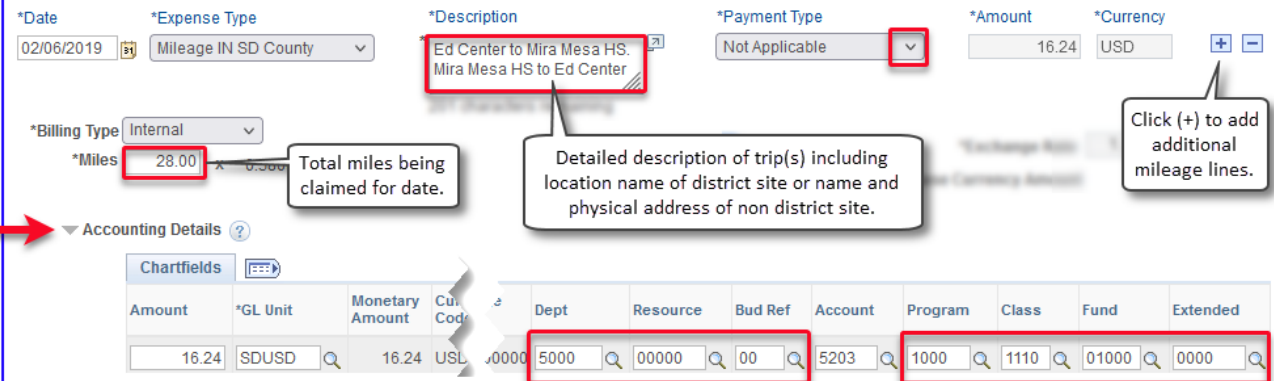
Budget Status Valid

Enter SAN DIEGO in Default Location

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.



The screenshot shows the Mileage Expense Report form with the following details:

- Date:** 02/06/2019
- Expense Type:** Mileage IN SD County
- Description:** Ed Center to Mira Mesa HS. Mira Mesa HS to Ed Center
- Payment Type:** Not Applicable
- Amount:** 16.24
- Currency:** USD
- Billing Type:** Internal
- Miles:** 28.00
- Accounting Details:** Expanded to show chartfields:

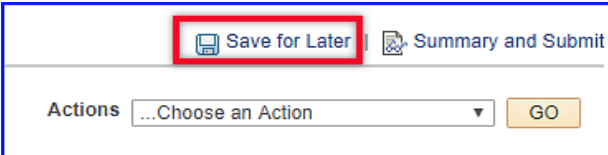
| Amount | *GL Unit | Monetary Amount | Currency | Dept | Resource | Bud Ref | Account | Program | Class | Fund | Extended |
|--------|----------|-----------------|----------|------|----------|---------|---------|---------|-------|-------|----------|
| 16.24 | SDUSD | 16.24 | USD | 5000 | 00000 | 00 | 5203 | 1000 | 1110 | 01000 | 0000 |

Callouts in the image provide additional context:

- "Total miles being claimed for date." points to the Miles field.
- "Detailed description of trip(s) including location name of district site or name and physical address of non district site." points to the Description field.
- "Click (+) to add additional mileage lines." points to the plus icon in the top right.

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

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



The screenshot shows the bottom of the form with the following buttons and controls:

- Save for Later** (highlighted with a red box)
- Summary and Submit**
- Actions:** ...Choose an Action (dropdown menu)
- GO** (button)

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**.



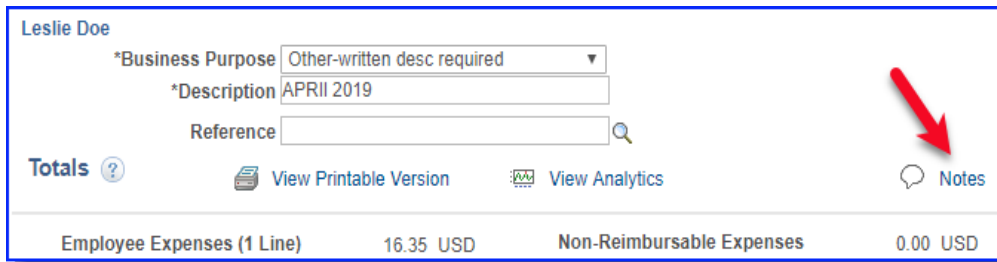
Save for Later | **Summary and Submit**

Actions: ...Choose an Action [GO]

Report: 0000162897 Pending

Default Location: SAN DIEGO

10. Click **Notes**.



Leslie Doe

*Business Purpose: Other-written desc required

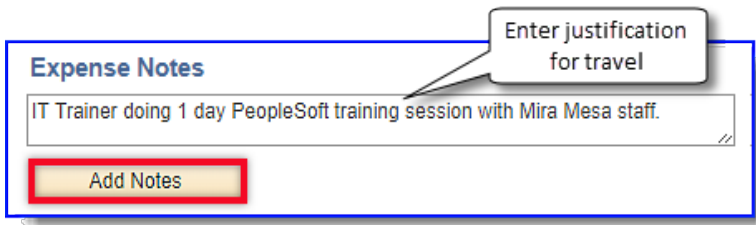
*Description: APRIL 2019

Reference: [Search]

Totals [?] [View Printable Version] [View Analytics] **Notes**

| | | | |
|----------------------------|-----------|---------------------------|----------|
| Employee Expenses (1 Line) | 16.35 USD | Non-Reimbursable Expenses | 0.00 USD |
|----------------------------|-----------|---------------------------|----------|

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**.



Expense Notes

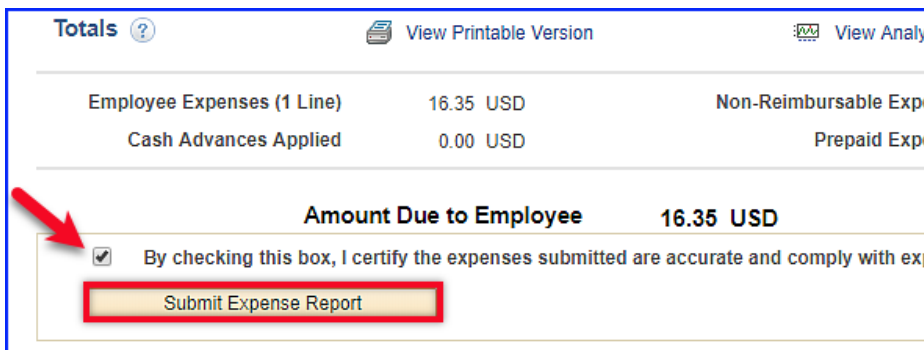
Enter justification for travel

IT Trainer doing 1 day PeopleSoft training session with Mira Mesa staff.

Add Notes

12. Click **OK**.

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



Totals [?] [View Printable Version] [View Analy]

| | | | |
|----------------------------|-----------|--------------------------|--|
| Employee Expenses (1 Line) | 16.35 USD | Non-Reimbursable Expense | |
| Cash Advances Applied | 0.00 USD | Prepaid Expense | |

Amount Due to Employee 16.35 USD

By checking this box, I certify the expenses submitted are accurate and comply with exp

Submit Expense Report

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

Save Confirmation
Leslie Doe

Totals ?

| | | |
|-------------------------------|-----------|------------------|
| Employee Expenses (2 Lines) | 16.36 USD | Non-Re |
| Cash Advances Applied | 0.00 USD | |
| Amount Due to Employee | | 16.36 USD |

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

View Expense Report

Leslie Doe
Your expense report 0000162897 has been submitted for approval.

| | | | | |
|------------------|-----------------------------|--------------|-------------|-----------------------|
| Business Purpose | Other-written desc required | Report | 0000162897 | Submission in Process |
| Description | APRIL 2019 | Created | 05/06/2019 | Kris Doe |
| Reference | | Last Updated | 05/06/2019 | Kris Doe |
| | | Post State | Not Applied | |

Totals ? [View Printable Version](#) [View Analytics](#) [Notes](#)

| | | | |
|-------------------------------|-----------|---------------------------|-------------------------------|
| Employee Expenses (2 Lines) | 16.36 USD | Non-Reimbursable Expenses | 0.00 USD |
| Cash Advances Applied | 0.00 USD | Prepaid Expenses | 0.00 USD |
| Amount Due to Employee | | 16.36 USD | Amount Due to Supplier |

By checking this box, I certify the expenses submitted are accurate and complete.

Amount that will be reimbursed to employee.