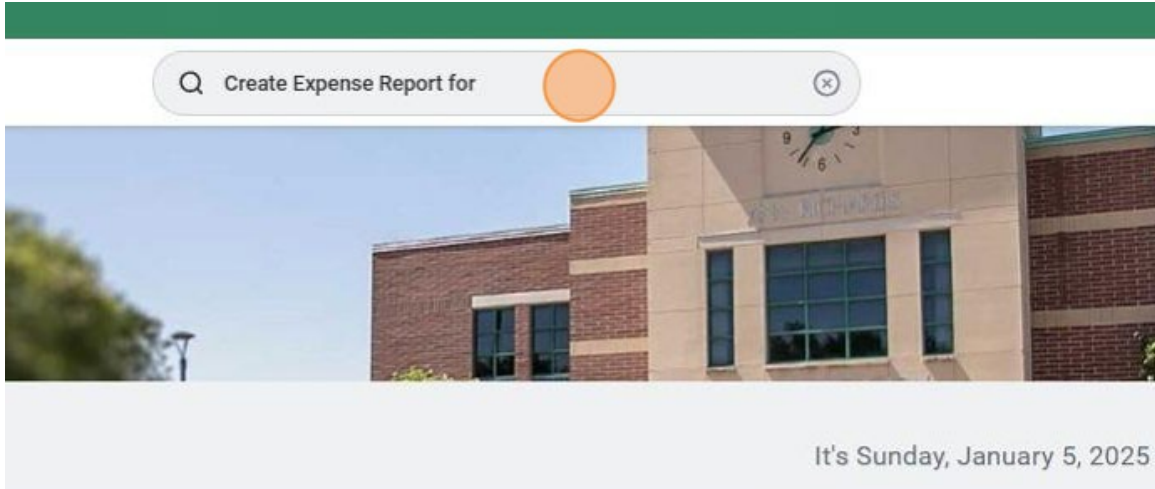


Expenses:

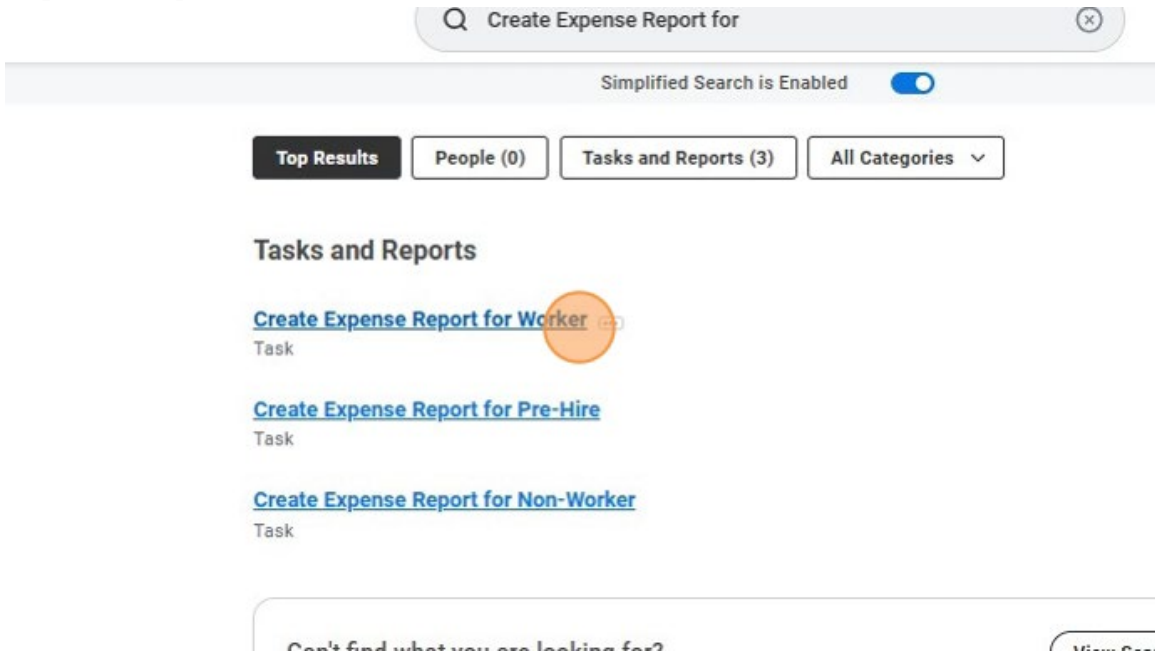
Create an In-District Mileage Expense Report for Worker

The following demonstration will show you how to create an In-District Mileage Expense Report for worker.

1. Click the "Search" field. Type "Create Expense Report for" and enter.



2. Notice the tasks and reports that have been displayed. Click "Create Expense Report for Worker"

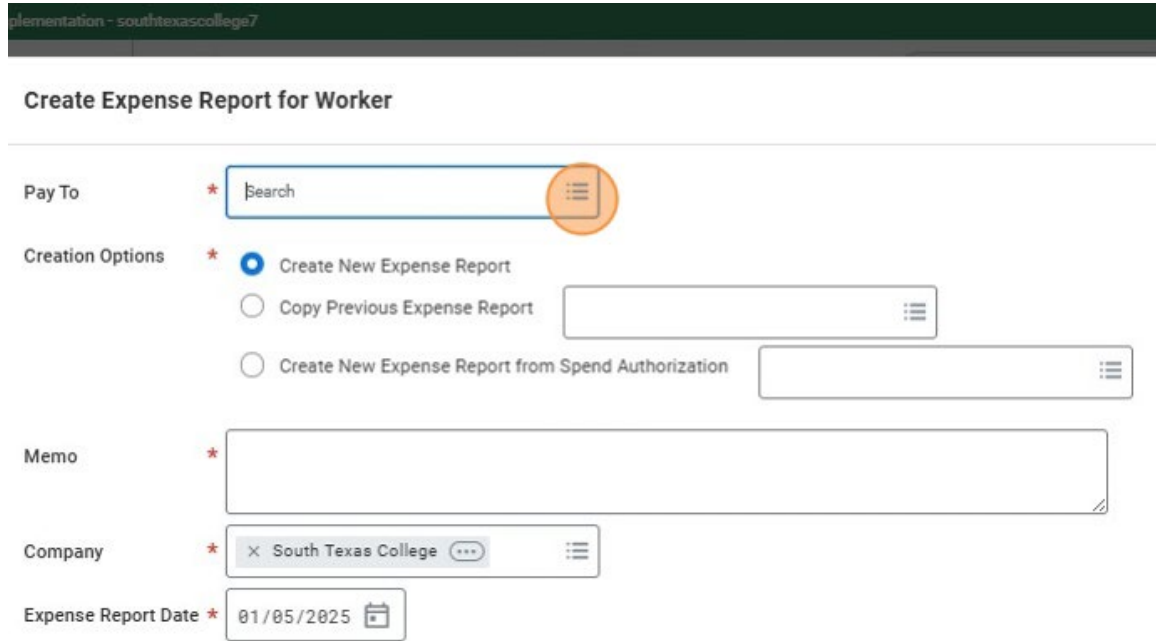


Expenses:

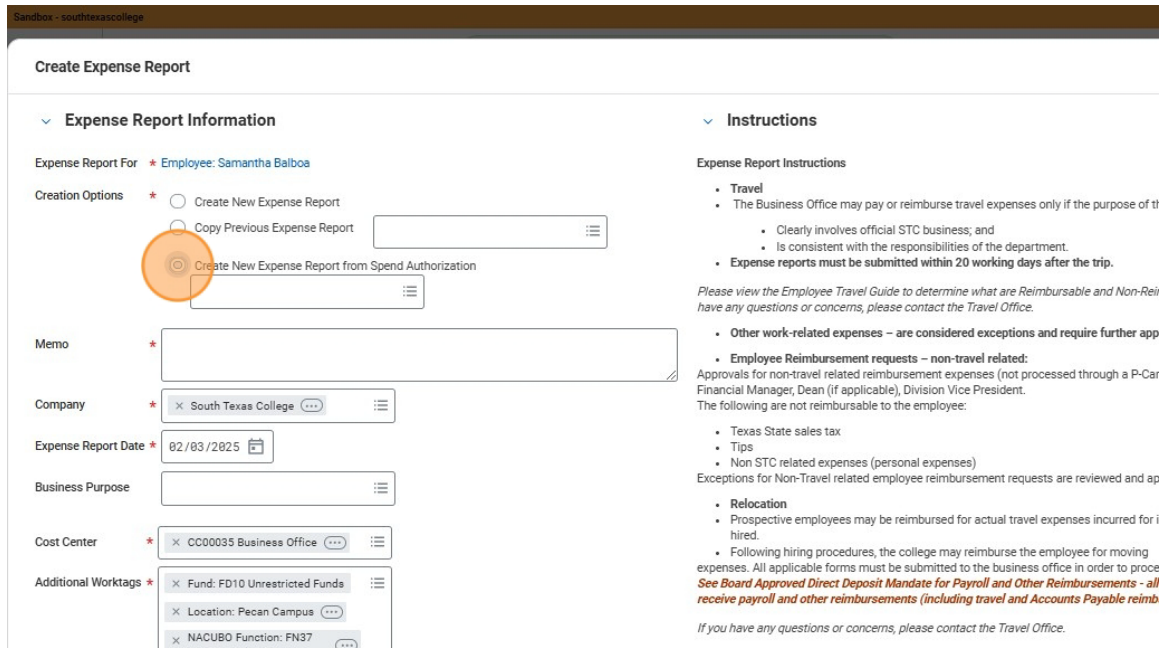
Create an In-District Mileage Expense Report for Worker

3. Click "Pay To" and enter the name of the Traveler.

Please note that you can only create an expense report for someone in your own cost center.



4. Click the "Create New Expense Report from Spend Authorization" field.



Expenses:

Create an In-District Mileage Expense Report for Worker

5. Select the correct Spend Authorization that was created for In-District Mileage. Selecting the spend authorization will populate the Company, Memo, Business Purpose, Cost Center and Additional Worktags.

Please update your memo to reflect the dates you are requesting mileage. These should match the dates on the mileage log. This is the report name; please ensure this is correct for Business Office reporting purposes.

For example: S_Balboa_InDistrictMileage_01/01-01/31

Create Expense Report

Expense Report Information

Expense Report For * Employee: Samantha Balboa

Creation Options * Create New Expense Report
 Copy Previous Expense Report
 Create New Expense Report from Spend Authorization

Memo *

Company *

Expense Report Date *

Business Purpose

Cost Center *

Additional Worktags *

Instructions

Expense Report Instructions

- **Travel**
 - The Business Office may pay or reimburse travel expenses only if the purpose of the expense is:
 - Clearly involves official STC business; and
 - Is consistent with the responsibilities of the department.
 - **Expense reports must be submitted within 20 working days after the trip.**

Please view the Employee Travel Guide to determine what are Reimbursable and Non-Reimbursable. If you have any questions or concerns, please contact the Travel Office.

- **Other work-related expenses – are considered exceptions and require further approval.**
- **Employee Reimbursement requests – non-travel related:**
Approvals for non-travel related reimbursement expenses (not processed through a P-Car Financial Manager, Dean (if applicable), Division Vice President). The following are not reimbursable to the employee:
 - Texas State sales tax
 - Tips
 - Non STC related expenses (personal expenses)Exceptions for Non-Travel related employee reimbursement requests are reviewed and approved by the Business Office.
- **Relocation**
 - Prospective employees may be reimbursed for actual travel expenses incurred for hire.
 - Following hiring procedures, the college may reimburse the employee for moving expenses. All applicable forms must be submitted to the business office in order to process.

See Board Approved Direct Deposit Mandate for Payroll and Other Reimbursements - all receive payroll and other reimbursements (including travel and Accounts Payable reimbursements). If you have any questions or concerns, please contact the Travel Office.

6. Final Expense Report for Spend Authorization will close your Spend Authorization. Do not select, unless this is the final expense report you plan on doing for your entire mileage spend authorization.

Create Expense Report

Expense Report Information

Expense Report For * Employee: Samantha Balboa

Creation Options * Create New Expense Report
 Copy Previous Expense Report
 Create New Expense Report from Spend Authorization

Memo *

Company *

Expense Report Date *

Business Purpose

Cost Center *

Final Expense Report for Spend Authorization

Instructions

Expense Report Instructions

- **Travel**
 - The Business Office may pay or reimburse travel expenses only if the purpose of the expense is:
 - Clearly involves official STC business; and
 - Is consistent with the responsibilities of the department.
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- **Relocation**
 - Prospective employees may be reimbursed for actual travel expenses incurred for hire.
 - Following hiring procedures, the college may reimburse the employee for moving expenses. All applicable forms must be submitted to the business office in order to process.

See Board Approved Direct Deposit Mandate for Payroll and Other Reimbursements - all receive payroll and other reimbursements (including travel and Accounts Payable reimbursements). If you have any questions or concerns, please contact the Travel Office.

7. Click "OK" to continue.

Expenses:

Create an In-District Mileage Expense Report for Worker

Creation Options

- Create New Expense Report
- Copy Previous Expense Report
- Create New Expense Report from Spend Authorization

Final Expense Report for Spend Authorization

Memo * S_Balboa_InDistrictMileage_Jan-May

Company * South Texas College

Expense Report Date * 02/03/2025

Business Purpose * In District

Cost Center * CC00035 Business Office

Additional Worktags *

- Fund: FD10 Unrestricted Funds
- Location: Pecan Campus
- NACUBO Function: FN37 Institutional Support

OK Cancel

- Travel
- The Business Office may pay or reimburse travel expenses only if the purpose of the trip:
 - Clearly involves official STC business; and
 - Is consistent with the responsibilities of the department.
- Expense reports must be submitted within 20 working days after the trip.

Please view the Employee Travel Guide to determine what are Reimbursable and Non-Reimbursable expenses. If you have any questions or concerns, please contact the Travel Office.

- Other work-related expenses – are considered exceptions and require further approval.
- Employee Reimbursement requests – non-travel related:
Approvals for non-travel related reimbursement expenses (not processed through a P-Car Financial Manager, Dean (if applicable), Division Vice President. The following are not reimbursable to the employee:
 - Texas State sales tax
 - Tips
 - Non STC related expenses (personal expenses)Exceptions for Non-Travel related employee reimbursement requests are reviewed and approved by the Business Office.
- Relocation
 - Prospective employees may be reimbursed for actual travel expenses incurred for interviews.
 - Following hiring procedures, the college may reimburse the employee for moving expenses. All applicable forms must be submitted to the business office in order to process.

See Board Approved Direct Deposit Mandate for Payroll and Other Reimbursements - all employees must receive payroll and other reimbursements (including travel and Accounts Payable reimbursements) by the 15th of the month.

If you have any questions or concerns, please contact the Travel Office.

8. The Expense Line tab now displays. Select "Add" to begin adding your mileage expense.

Sandbox - southtexascollege

MENU Search

Create Expense Report 10000380 S_Balboa_InDistrictMileage_Jan-May

Pay To	Status	Personal	Cash Advance Applied	Reimbursement	Total
Employee: Samantha Balboa	Draft	0.00 USD	0.00 USD	0.00 USD	0.00 USD

Header Attachments **Expense Lines**

Add

There's nothing here

enter your comment

9. Click the "Expense Item" field and select In-District Mileage.

Expenses:

Create an In-District Mileage Expense Report for Worker

Header Attachments **Expense Lines**

Add

1 item

Expense Line

Drop files here
or
Select files

Expense Date * 02/03/2025

Expense Item * In-District Mileage

Quantity * 1

Rates Used 0.7

Total Amount 0.70

Instructions

Mileage Log BO-0400 required. Standard Mileage Method form if need Mileage chart, then odometer readings, maps only required if you're no Mileage Chart.

Item Details

Date From * MM/DD/YYYY

Date To * MM/DD/YYYY

Receipt Included

Submit Save for Later Close

10. Click the "Quantity" field and enter the number of miles you are requesting reimbursement for.

Expense Line

Drop files here
or
Select files

Expense Date * 02/03/2025

Expense Item * In-District Mileage

Quantity * 100

Rates Used 0.7

Total Amount 70.00

Currency USD

Memo

*Cost Center CC00035 Business Office

*Additional Worktags
Fund: FD10 Unrestricted Funds
Location: Pecan Campus
NACUBO Function: FN37 Institutional Support

Instructions

Mileage Log BO-0400 required. Standard Mileage Method form if Mileage chart, then odometer readings, maps only required if you Mileage Chart.

Item Details

Date From * MM/DD/YYYY

Date To * MM/DD/YYYY

Receipt Included

11. Under Item Details: Enter the dates you are requesting mileage for; these should match the header memo.

Expenses:

Create an In-District Mileage Expense Report for Worker

For example: I am requesting mileage for dates between January 1st through January 31st.

Expense Line

Drop files here
or
Select files

Expense Date * 02/03/2025

Expense Item * In-District Mileage

Quantity * 100

Instructions

Mileage Log BO-0400 required. Standard Mileage Method form if needed. Preferred Mileage chart, then odometer readings, maps only required if you're not using STC's Mileage Chart.

Item Details

Date From * 01/01/2025

Date To * 01/31/2025

Receipt Included

12. Click here to upload the required documentation:

The following list is not all-inclusive

- A mileage log with dates, miles per trip, purpose, and destination.
- The point-to-point mileage chart provided by the Business Office should be used first.
- If your destination is not listed on the chart, please provide your odometer readings or Maps.
- Standard Mileage Method form if needed
- Teaching schedule called "1F5" for all instructors.
- If the trips do not match the "1F5" schedule, Office hours must be provided.
- Etc.

Please do not upload Driver's License and Insurance. DL & Insurance that covers the dates of the mileage need to be emailed to traveloffice@southtexascollege.edu.

Header Attachments Expense Lines

Add

1 item

Expense Line

Drop files here
or
Select files

Expense Date * 02/03/2025

Expense Item * In-District Mileage

Quantity * 100

Instructions

Mileage Log BO-0400 required. Standard Mileage Method form if needed. Mileage chart, then odometer readings, maps only required if you're not u Mileage Chart.

Item Details

Date From * 01/01/2025

Date To * 01/31/2025

Receipt Included

Expenses:

Create an In-District Mileage Expense Report for Worker

13. Click "Submit"

The screenshot shows a web interface for creating an expense report. On the left, a sidebar lists '1 item' for 'Mon, Feb 3' with 'In-District Mileage' for '70.00 USD'. The main form is titled 'Expense Line' and includes a PDF upload section for 'Trip Mileage Map.pdf' (uploaded by Samantha Balboa). Below this is a 'Comment' field. An 'Upload' button is present. The 'Expense Date' is set to '02/03/2025'. The 'Expense Item' is 'In-District Mileage'. The 'Quantity' is '100'. 'Rates Used' is '0.7' and 'Total Amount' is '70.00'. The 'Currency' is 'USD'. A 'Memo' field is at the bottom. To the right, 'Instructions' state that a Mileage Log BO-0400 is required. 'Item Details' show 'Date From' as '01/01/2025' and 'Date To' as '01/31/2025'. A 'Receipt Included' checkbox is checked. At the bottom, there are 'Submit', 'Save for Later', and 'Close' buttons. An orange circle highlights the 'Submit' button.

14. Your Expense Report is now complete and has been submitted.

The screenshot shows a confirmation message: 'You have submitted'. Below this, it says 'Up Next: Check Budget (Financial) for Expense Report - Batch/Job: Run Budget Check' with a 'View Details' link. An orange circle highlights the 'View Details' link. At the bottom of the message, it says 'Alerts: 1' and 'View All'. Below the message, there is a table with the following details:

Paid	Yes
Reimbursement Payment Type	Direct Deposit
Justification	3 Questions Answered
Expense Report(s)	Expense Report: 10000179