

Employee Expense Claims & Reimbursements Through Employee Self Service



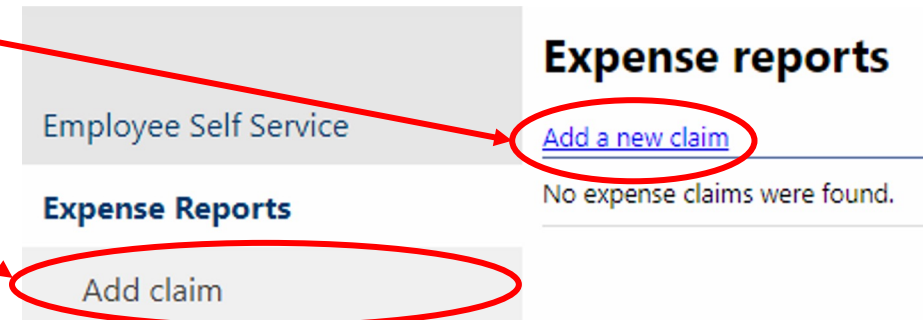
Entering Expense Claims in Employee Self Service

- To Enter/Submit an Expense Claim do the following:

- Step 1: Choose Expense Reports in the Index
(Index is located on left side of screen)



- Step 2: Choose Add Claim under Expense Reports in the Index or in the Expense Reports window click Add a new claim.



Entering Expense Claims in Employee Self Service

- Step 3: Choose the Claim Type.
 - There are several types of claims to choose from, we will go over each one individually. It is very important that you choose the correct claim type in order for your reimbursement to be paid to you correctly.
 - Claim Type Options and Descriptions are as follows:
 - 2023 Daily Travel – The [2023 Daily Travel](#) form is used when you are requesting reimbursement for mileage only.
 - 2023 In-State Travel – The [2023 In-State Travel](#) form is used when you travel to any Georgia county and are requesting reimbursement for items in addition to mileage.



Entering Expense Claims in Employee Self Service

- Miscellaneous – The [Miscellaneous](#) form is used when you are requesting reimbursement for any non-travel related claim.
- 2023 Out of State Travel – The [2023 Out of State Travel](#) Form is used if you travel outside of the State of Georgia and require reimbursement for items in addition to mileage. If you travel out of state and only have mileage to turn in you can use the [Daily Travel](#) form. If your out of state travel has mileage, lodging and meal claims, please call Karen Acrey to get the meal rate for the state you traveled to. This form does not have preset meal rates, therefore you will be required to enter your meal cost.



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- 2023 Over 60 Travel – The [2023 Over 60 Travel](#) form is for travel expenses incurred more than 60 days from the date your claim will be reimbursed. These claims will be included on your next payroll check with taxes taken out per the IRS regulations. The 60 day rule starts at the date of purchase or the date of travel for mileage. If you have a conference registration or airfare that you are paying ahead of time, the 60 day time clock starts the day the transaction is made, NOT the date of the conference, flight or lodging. Being proactive on travel reimbursement will keep you from having to use this form and risk not being paid back for the full cost of the travel.
- SFS Uniforms – The [SFS Uniforms](#) form is for School Nutrition only. This form is used for Nutrition employees to receive reimbursement for their uniforms.



Entering Expense Claims in Employee Self Service

- Step 4: Select Department/Location

Department*

- Step 5: Enter Description

Description*

- Step 6: Select Event Type (if applicable)

Event

- select one (optional)
- Athletics
- Conference
- In-District Travel

- Step 7: Enter Start Date

Start date*

- Step 8: Enter Start Time (if applicable)

Start time

NOTE: Use HH:MM format. For example, use '08:30' for 8.30 am, '17:00' for 5 pm.

- Step 9: Enter End Date

End date*

- Step 10: Enter End Time (if applicable)

End time

NOTE: Use HH:MM format. For example, use '08:30' for 8.30 am, '17:00' for 5 pm.



Entering Expense Claims in Employee Self Service

- Step 11: Enter Destination City
- Step 12: Enter Destination State
- Step 13: Click Continue

Destination city*

Destination state*

Continue

- Once you select continue you will be taken to the expenses and receipts part of the claim. This is where you will enter in all of your mileage, and this is also where you will enter in your meals, airfare, lodging, conference registration, etc. if you chose one of the other claim forms.



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Entering Expense Claims in Employee Self Service

- Example of a Daily Travel Claim:
 - The department you select drives the workflow for the claim.
 - Please make sure you choose the department where your travel is normally sent.
 - Karen Acrey can help you determine your correct department if you have questions.

Claim type	<input type="text" value="Daily Travel"/>
Department*	<input type="text" value="Finance"/>
Description*	<input type="text" value="Travel to Wauka Mountain"/>
Event	<input type="text" value="In-District Travel"/>
Start date*	<input type="text" value="07/15/2021"/>
Start time	<input type="text" value="00:00"/> <small>NOTE: Use HH:MM format. For example, use '08:30' for 8.30 am, '17:00' for 5 pm.</small>
End date*	<input type="text" value="07/15/2021"/>
End time	<input type="text" value="00:00"/> <small>NOTE: Use HH:MM format. For example, use '08:30' for 8.30 am, '17:00' for 5 pm.</small>
Destination city*	<input type="text" value="Clermont"/>
Destination state*	<input type="text" value="GA"/>
Destination country	<input type="text"/>
<input type="button" value="Continue"/> <input type="button" value="Cancel"/>	



Entering Expense Claims in Employee Self Service

- Once you select continue you will be taken to the expenses and receipts part of the claim. This is where you will enter in all of your mileage, and this is also where you will enter in your meals, airfare, lodging, conference registration, etc. if you chose one of the other claim forms.

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Employee Self Service

Certifications

Expense Reports

Add claim

Edit details

Expenses & receipts

Employee Notifications

Pay/Tax Information

Personal Information

Substitute Teaching

Time Off

Expenses and receipts

Unsaved claim

Edit details

Claim type	Daily Travel
Department	Finance
Description	Travel to Wauka Mountain
Event	In-District Travel
Start date	Thursday, July 15, 2021
End date	Thursday, July 15, 2021
Destination city	Clermont
Destination state	GA
Destination country	
Cash advance	\$0.00
Total amount claimed	\$0.00

Unit expenses

Add an expense

Expense	Comments	Date	Amount
Mileage	Wauka Mountain	7/15/2021	\$5.60

Attach supporting documents

Choose File

 No file chosen

Review

Save For Later

Cancel

Expense information

Expense type

Mileage

i

10

@

\$ 0.560

MILES = \$5.60

Date incurred

7/15/2021

Comments

Wauka Mountain

Save expense


Cancel

Entering Expense Claims in Employee Self Service

- Step 14: Enter Expense Information by completing the following steps:

*The options will vary depending on the claim form selected.

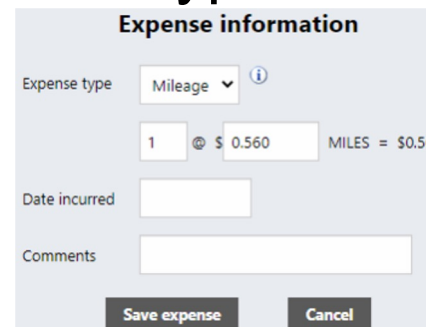
- Step A: Click the Plus Sign beside Unit Expenses

 Unit expenses

- Step B: Click Add an Expense (located on the far side of the Screen)

[Add an expense](#)

- Step C: Choose the Expense Type and enter the necessary information:



The form is titled "Expense information". It contains the following fields:

- Expense type:** A dropdown menu with "Mileage" selected and an information icon.
- Amount:** A field with "1" entered, followed by "@ \$ 0.560". To the right, it says "MILES = \$0.56".
- Date incurred:** An empty text field.
- Comments:** An empty text area.
- Buttons:** "Save expense" and "Cancel" at the bottom.

- Step D: Click Save Expense



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- Step E: Click the Plus Sign beside Attach supporting documents (if applicable)

 Attach supporting documents

- Step F: Click Choose File to upload supporting documents.
- Step 15: Click Review.
- Step 16: Click the check box beside I have read and agree to the terms above.

Choose File

Review

I do solemnly swear, under penalty provided by law, this account of travel expenses is accurate and conforms with all applicable State and School District regulations. The expenses are actual, reasonable, and were personally incurred in the performance of my official duties for Hall County Schools and the State of Georgia. No portion of this claim was provided free of charge, previously paid from any other source, or will be paid from any other source in the future.

☐ I have read and agree to the terms above.

- Step 17: Click Submit Claim

Submit Claim

After this process has been completed your claim will go to the district level for allocation and approval. Once that has been done you will receive payment on your claim. Claims will be paid weekly.



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Summary

Employee Self Service

Expense Reports

Add claim

Edit details

Expenses & receipts

Employee Notifications

Pay/Tax Information

Personal Information

Substitute Teaching

Time Off

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Expenses and receipts

Unsaved claim [Edit details](#)

Claim type

In-State Travel

Department

Finance

Description

GASBO

Event

Conference

Start date

Monday, July 12, 2021

End date

Wednesday, July 14, 2021

Destination city

Macon

Destination state

GA

Destination country

Cash advance

\$0.00

Total amount claimed

\$0.00

Per diem expenses

\$49.00

	<input type="checkbox"/> Breakfast In ⓘ	<input type="checkbox"/> Lunch In ⓘ	<input type="checkbox"/> Dinner In ⓘ	Total
Monday, July 12	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 15.00	\$15.00
Tuesday, July 13	<input checked="" type="checkbox"/> 6.00	<input checked="" type="checkbox"/> 7.00	<input checked="" type="checkbox"/> 15.00	\$28.00
Wednesday, July 14	<input checked="" type="checkbox"/> 6.00	<input type="checkbox"/>	<input type="checkbox"/>	\$6.00
	\$12.00	\$7.00	\$30.00	

Unit expenses

\$140.00

[Add an expense](#)

Expense	Comments	Date	Amount	
Fares		7/12/2021	\$140.00	update delete

Attach supporting documents

Choose File

No file chosen

Review

Save For Later

Cancel



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Contact Information

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