Employee Expense Claims & Reimbursements Through Employee Self Service
To Enter/Submit an Expense Claim do the following:

1. Choose Expense Reports in the Index (Index is located on left side of screen)
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.
Entering Expense Claims in Employee Self Service

- 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
- Step 5: Enter Description
- Step 6: Select Event Type (if applicable)
- Step 7: Enter Start Date
- Step 8: Enter Start Time (if applicable)
- Step 9: Enter End Date
- Step 10: Enter End Time (if applicable)
Entering Expense Claims in Employee Self Service

• Step 11: Enter Destination City

• Step 12: Enter Destination State

• Step 13: Click 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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- 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.
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.
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

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

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

  • Step D: Click Save Expense
Entering Expense Claims in Employee Self Service

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

• 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.

• Step 17: Click 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
Contact Information

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