

PERSONAL MILEAGE REIMBURSEMENTS

Concur How-To

- Procedure to create your report in the SBCC District Credit Card Policy, EXPENSE MODULE.
- Screenshots and step by step instructions begin on Page 2.
- ***Best Practice***: It is recommend Personal Mileage Reimbursement Requests be Submitted Monthly

1. Create New Report

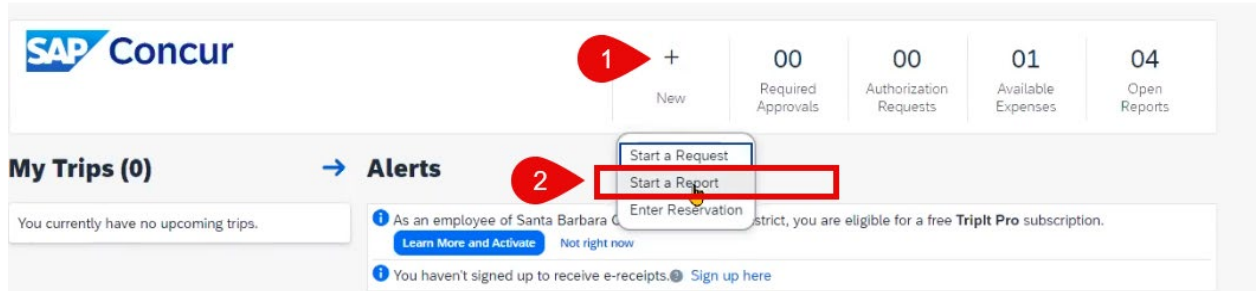
- a. Select the **Expense module** and **SBCC Credit Card Policy**
- b. Enter the Report Title, and the date range included in the report
- c. Complete report. All required fields are marked with a red asterisk
 - i. Boxes titled: ***Employee Type and Report/Trip Purpose***
 1. Select the ***District Credit Card*** from the dropdown menu.
 2. Fill in your budget code:
 - a. Select the ***Chart*** in the box (select the only option available).
 - b. Enter your Fund, Org, Program (plus Activity and Location, if applicable); Retain the Account Number for use when “adding expenses”.
 3. Once you have completed all fields, select the ***Create Report*** button in the bottom right.

2. Add Expenses to your report

- a. Open your new Report and select the ***Add Expense*** button.
 - i. In the new screen that opens, enter your Expense Type (aka Account Code): Use the ***Expense Type: Personal Car Mileage***
 1. Instead of uploading a receipt as you would for other expenses, select the ***Mileage Calculator*** that is in blue near the upper left of the expense screen.
 2. This will connect you to Google Maps to calculate the mileage.
 3. Enter starting and ending addresses and click ***Calculate Route***.
 4. Select ***Add Mileage to Expense***
 - ii. Save
 - iii. Submit

CREATE A NEW REPORT

1. Select **NEW**
2. Select **START A REPORT**



3. Select **DISTRICT CREDIT CARD POLICY**



4. Data Entry: **Report Trip Name**
 - a. Enter a Report name that will make sense to you and to your approver. Include unique naming to distinguish from month to month. Example 'March 2024 Mileage Report'
5. Data Entry: **Report/Trip Start Date** - Enter start date
6. Data Entry: **Report/Trip End Date** - Enter end date
7. Data Entry: **Report/Trip Purpose**
 - a. Select **DISTRICT CREDIT CARD**
8. Data Entry: **Employee Type** - Select **DISTRICT CREDIT CARD**
9. Data Entry: **Trip Type** - Select **NONE**
10. Select **CHART** - Find and Select **(1) SBCC Chart**.

Notes on Budget Codes:

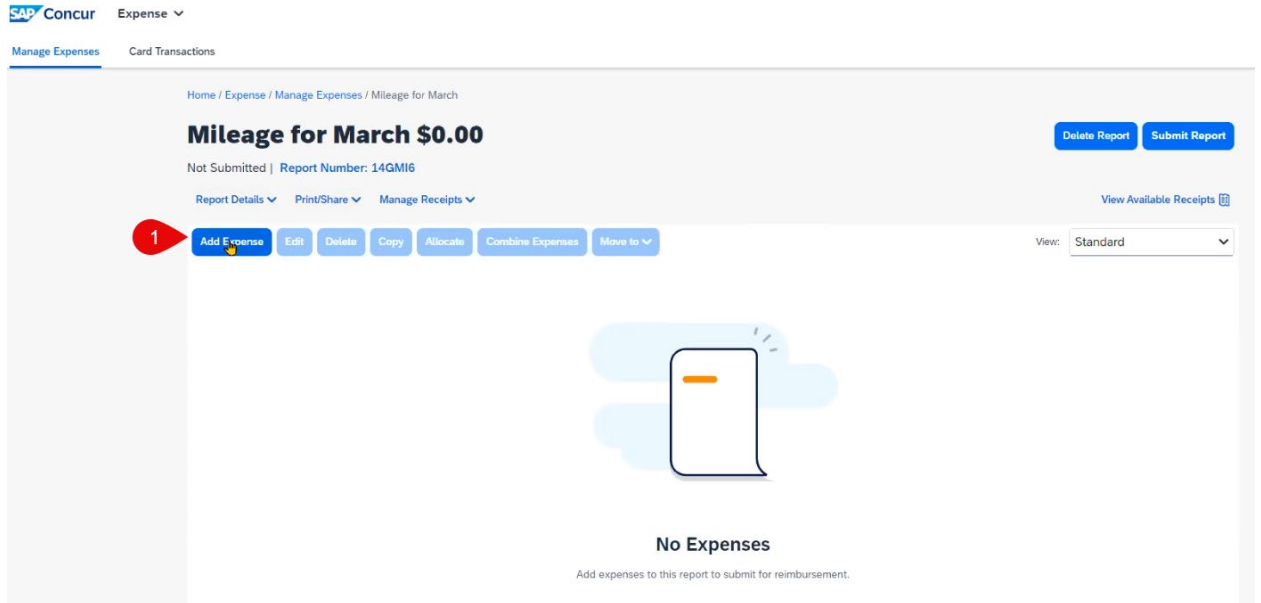
If you have been given a budget code that looks like this: 799414-0000-451000-000000, then 799414 is the Fund, 0000 is the Org, and 000000 is the Program. The '451000' portion is the account code, which is the equivalent of Expense Type, in Concur. You will select your Expense type on a different screen.

11. Select **FUND** - Find/Enter your funding source, such as 11000 for the UGF, a fund beginning with a 12 for a RGF Grant Fund, etc.

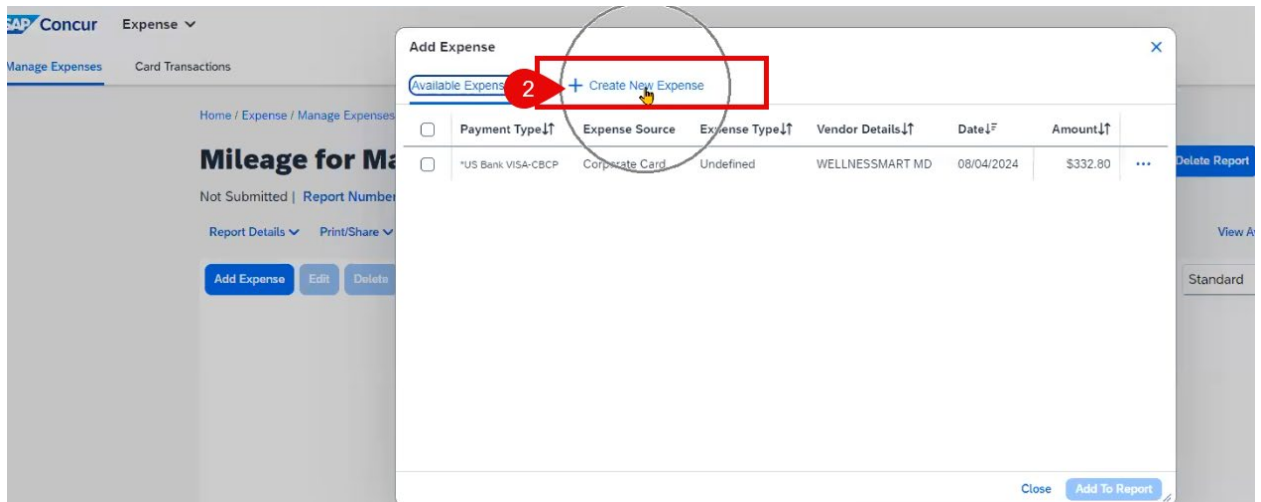
12. Select **ORG** - Find/Enter your Department four-digit code.
13. Select **PROGRAM** - Find/Enter your Program six-digit code.
14. Select **ACTIVITY** - Use only when assigned; otherwise select **NONE**
15. Select **LOCATION**: Use only when assigned; otherwise select **NONE**
16. Select **CREATE REPORT**

17. Confirmation Screen: **“Report Saved”**
18. Explanation: New Report Details show the following:
 - a. Name Assigned
 - b. Not (yet) Submitted
 - c. Report Number assigned

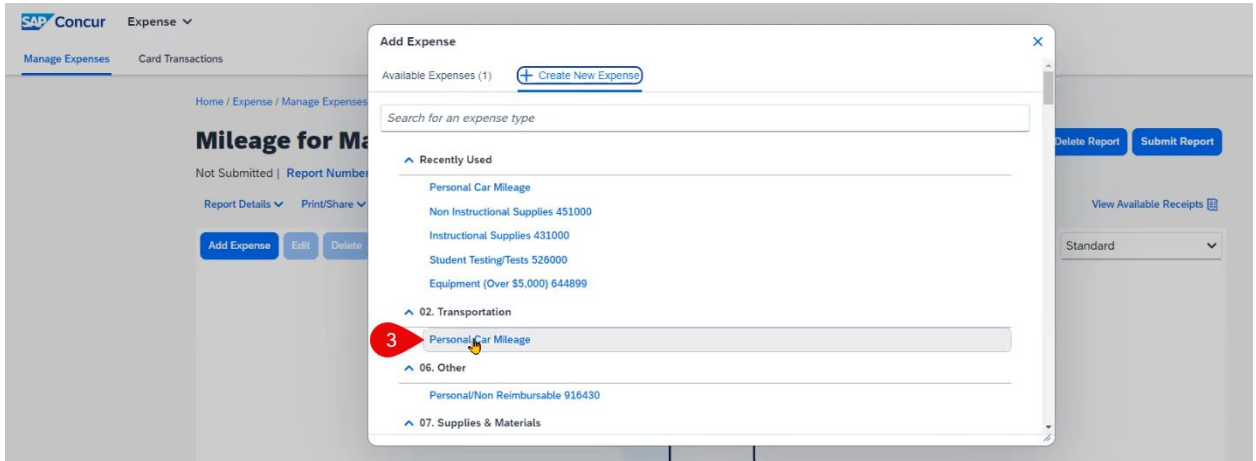
ADD EXPENSE



1. Select **ADD EXPENSE**

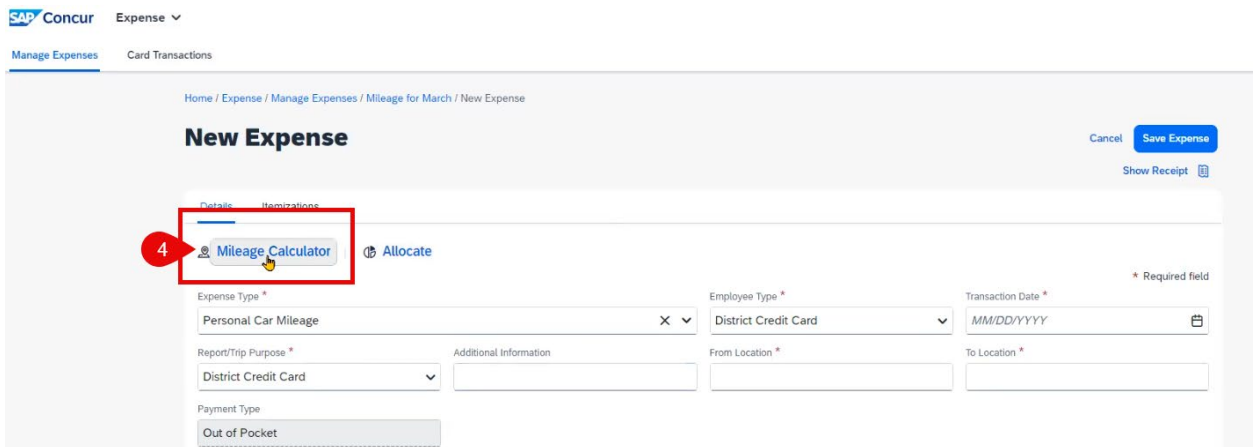


2. Select **CREATE NEW EXPENSE**



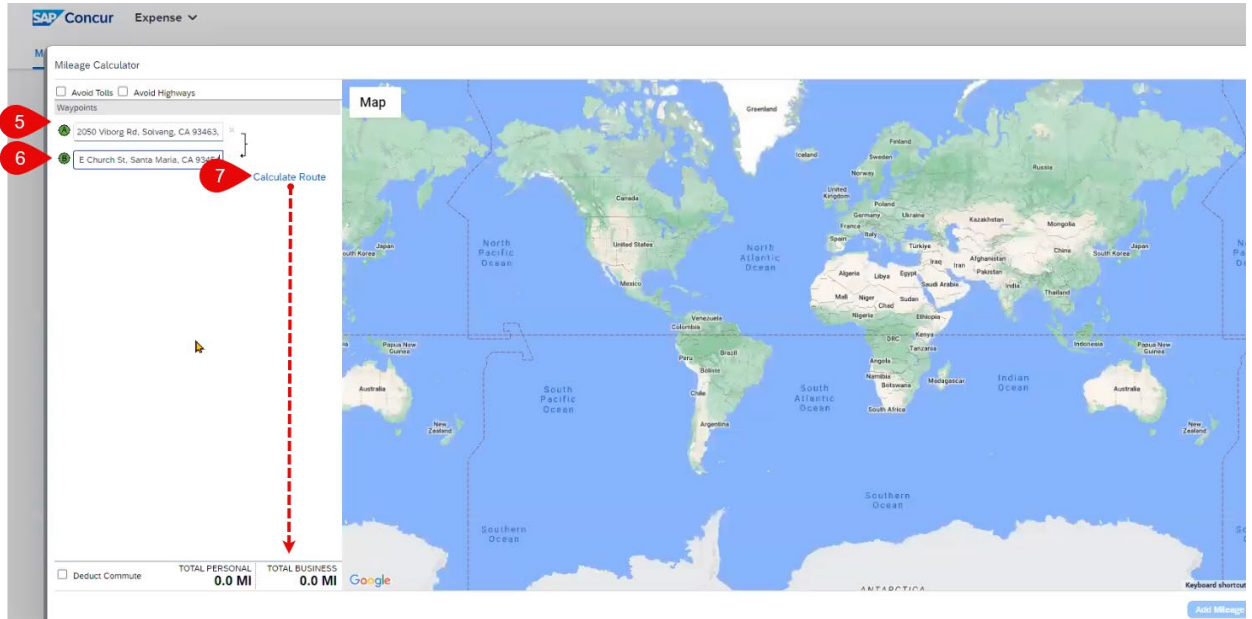
3. Select **(Account/Expense Type) PERSONAL CAR MILEAGE**

Pause for new screen

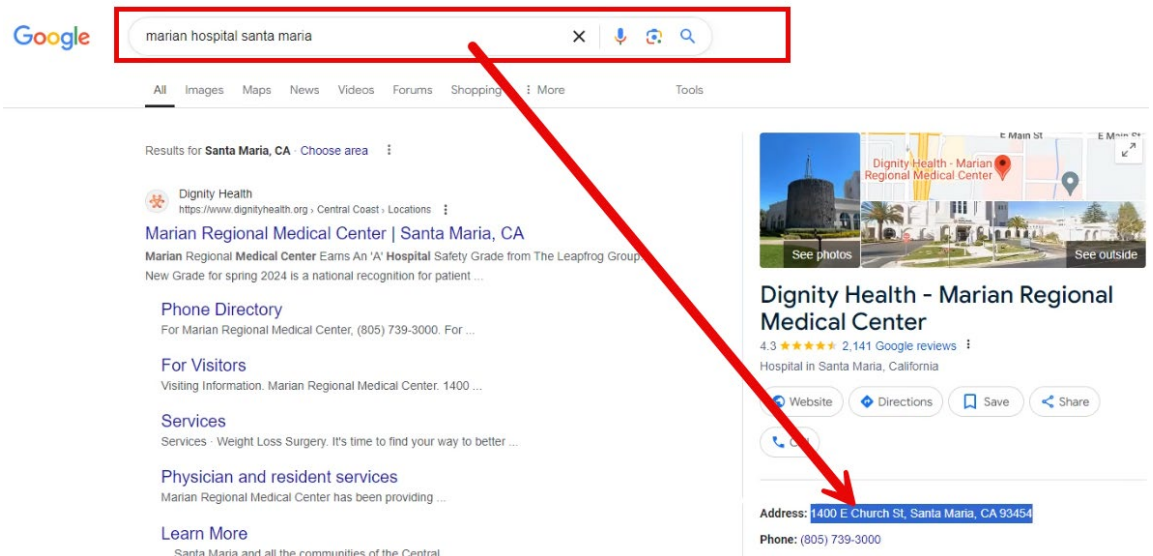


4. Select **MILEAGE CALCULATOR**
 - a. Concur uses Google Maps to calculate mileage. It is hard to calculate mileage by hand; Concur's mileage tracker is the official calculator of record for SBCC's mileage.

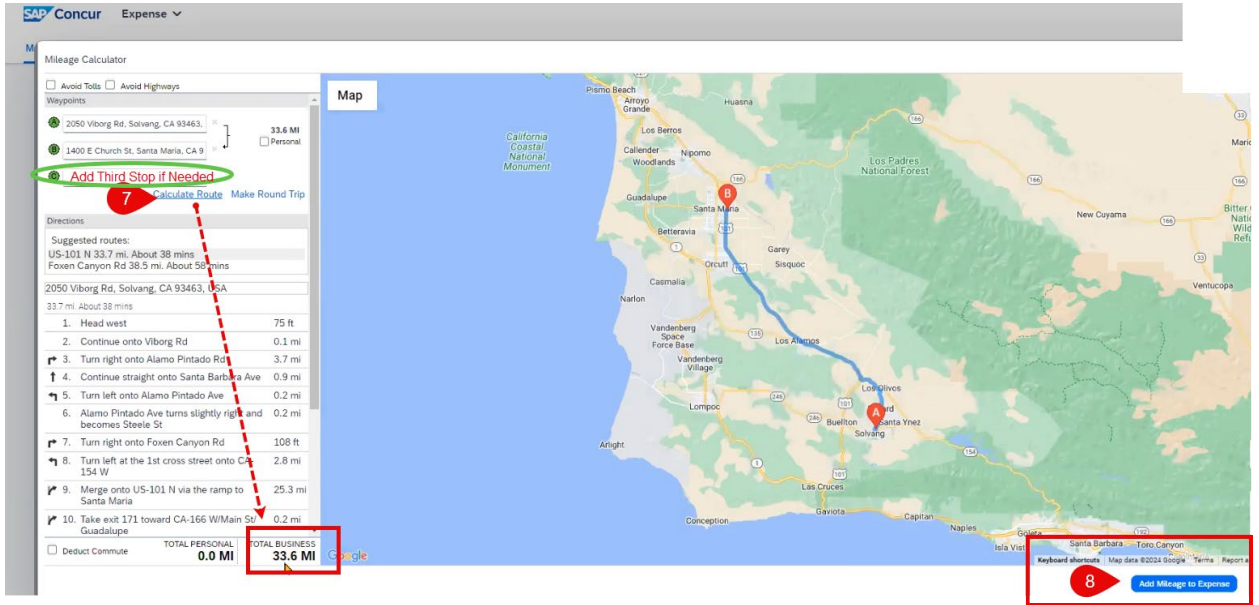
Pause for new screen



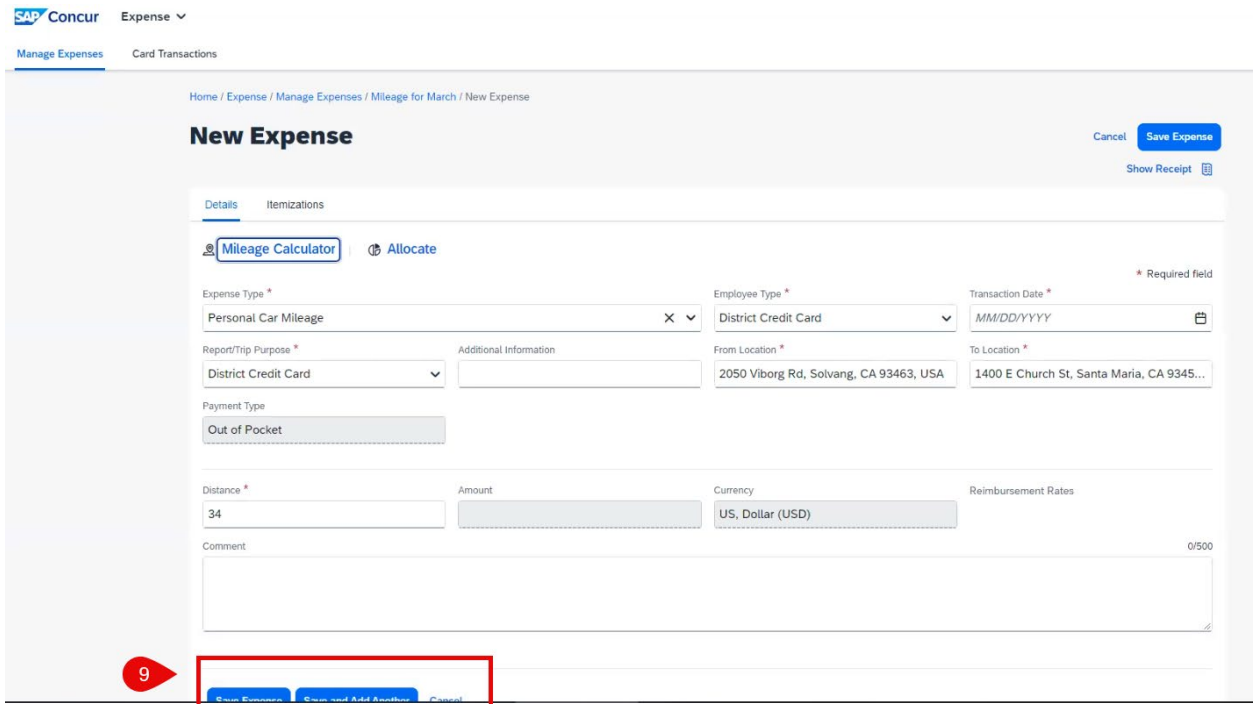
5. Enter the *Starting Address*.
 - a. If unknown, type into Google the business name and find their official address:



6. Enter the *Ending Address*.
7. Select **CALCULATE ROUTE**
 - a. The directions will populate and a calculation will appear in the **Total Business** box, see image below.
 - b. Add a third stop, if needed.



8. Select ADD MILEAGE TO EXPENSE



9. Select SAVE EXPENSE OR Select SAVE AND ADD ANOTHER