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.
- <u>Best Practice</u>: 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

SAP Concur		(1	+	00	00	01	04
			New	Required Approvals	Authorization Requests	Available Expenses	Open Reports
My Trips (0)	-		Start a Request				
ing mps (0)	~	Aterts 2	Start a Report				
You currently have no upcoming trips.		As an employee of Santa Barbara (Learn More and Activate Not right n	Enter Reservation	n strict, you are	eligible for a free Tr	iplt Pro subscripti	on.
		• You haven't signed up to receive e-	receipts. Sign up	here			

3. Select DISTRICT CREDIT CARD POLICY

Create New Report						
Create From an Approved Request						
Policy *						* Required field
*SBCC-Travel & Conference Expense Policy	~					
*SBCC-Travel & Conference Expense Policy						
*SBCC-District Card Expense Policy	Repor Trip Start Date *		Report/Trip End Date *		Report/Trip Purpose *	
	DDaaaay	±	MMODOVVVV	±	None Selected	~

- 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

* Required 1 ** Card Expense Policy ** ** ** ** ** ** ** ** **	Create From an Approved Request							
et Card Expense Policy * 5 Report Trip Start Date * 6 Report Trip End Date * 7 Report Trip Purpose 1 1 1 1 1 1 1 1 1 1 1 1 1	Policy *							* Required
************************************	*SBCC-District Card Expense Policy	~						
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Additional Information Additional Information Additional Information Additional Information In plane Additional Information In plane Additional Information In plane	Mileage for March		08/05/2024	Ë	08/30/2024	Ë	District Credit Card	
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logic & Imaging Sciences							(11000) General Fund - Unrestricted	×
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17. Confirmation Screen: "Report Saved"

- 18. <u>Explanation:</u> New Report Details show the following:
 - a. Name Assigned
 - b. Not (yet) Submitted
 - c. Report Number assigned

Concur Expense	×	
Manage Expenses Card Trans	sactions	
	Home / Expense / Manage Expenses / Mileage for March	
18	Mileage for March \$0.00	Delete Report Submit Report
	Not Submitted Report Number: 14GMI6	
	Report Details 🛩 Print/Share 🗸 Manage Receipts 🗸	View Available Receipts 🗒
	Add Expense Edit Delete Copy Allocate C bine Expenses Move to 🗸	View: Standard 🗸
	No Expenses	
	A d expenses to this report to submit for reimbursement.	
SAP Concur	17 Report saved	

ADD EXPENSE

SAP Concur	Expense 🗸	
Manage Expenses	Card Transactions	
	Home / Expense / Manage Expenses / Mileage for March	
	Mileage for March \$0.00	Delete Report Submit Report
	Not Submitted Report Number: 14GMI6	
	Report Details V Print/Share V Manage Receipts V	View Available Receipts 🗐
	Add Evense Edit Delets Copy Allocate Combine Expenses Move to V	View: Standard 🗸
	12	
	No Expenses	
	Add expenses to this report to submit for reimbursement.	

1. Select ADD EXPENSE

Concur Expense V		
	Add Expense	×
Manage Expenses Card Transactions	Available Expense + Create New Expense	
Home / Expense / Manage Expenses	□ Payment Type↓↑ Expense Source Exvense Type↓↑ Vendor Details↓↑ Date↓ [∓] Amoun	nt↓↑
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Not Submitted Report Number		
Report Details 🗸 Print/Share 🗸		Viev
Add Expense Edit Delete		Standar
	Close 🗛	id To Report

2. Select CREATE NEW EXPENSE

	Add Expense	×
nage Expenses Card Transactions	Available Expenses (1)	÷
Home / Expense / Manage Ex	enses Search for an expense type	
Mileage for	Ma	Delete Report Submit Report
Not Submitted Report N	Recently Used	
Report Details 🛩 Print/Si	are V Non Instructional Supplies 451000	View Available Receipts
Add Expense Edit	Instructional Supplies 431000	Standard
	Student Testing/Tests 526000 Equipment (Over \$5,000) 644899	
	 02. Transportation 	
	3 Personal Gar Mileage	
	∧ 06. Other	
	Personal/Non Reimbursable 916430	
	∧ 07. Suppues & materials	

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

Pause for new screen

SAP Concur	Expense 🗸					
Manage Expenses	Card Transactions					
	Home / Expense / Manage Expenses / Mileage for March / New Expense					
	New Expense					Cancel Save Expense
						Show Receipt
	4 Mileage Calculator Expense Type *		Employee Type *		Transaction Date *	* Required field
	Personal Car Mileage	× •	District Credit Card	~	MM/DD/YYYY	Ë
	Report/Trip Purpose * Additional Information		From Location *		To Location *	
	District Credit Card 🗸					
	Payment Type					
	Out of Pocket					

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

Details itemizations Mileage Calculator	Cancel Save Exp Show Receip * Required Transaction Date * MM/DD/YYYY Te Leczion *
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Details Itemizations Itemizations Itemizations Image: State of the stat	* Required Transaction Date * MM/DD/YYYY To Location *
Mileage Calculator	* Required Transaction Date * MM/DD/YYYY To Location *
Expense Type * Employee Type * Employee Type * District Credit Card Personal Car Mileage X V District Credit Card From Location * District Credit Card V 2050 Viborg Rd, Solvang, CA 93463, Payment Type	* Required Transaction Date * MM/DD/YYYY To Location * To Location *
Expense Type * Employee Type * Personal Car Mileage X Personal Car Mileage X	Transaction Date * MM/DD/YYYY To Location * To Location *
Personal Car Mileage X District Credit Card Report/Trip Purpose * Additional Information From Location * District Credit Card 2050 Viborg Rd, Solvang, CA 93463, Payment Type	MM/DD/YYYY To Location * Apple of busic for a first second secon
Report/Trip Purpose * Additional Information From Location * District Credit Card 2050 Viborg Rd, Solvang, CA 93463, Payment Type	To Location *
District Credit Card V 2050 Viborg Rd, Solvang, CA 93463, Payment Type	
Payment Type	1400 E Church St, Santa Maria, CA 934
Out of Pocket	
Distance * Amount Currency	Reimbursement Rates
34 US, Dollar (USD)	
Comment	

9. Select SAVE EXPENSE OR Select SAVE AND ADD ANOTHER