TravelWayne

Travel Request and Expense Report Processing for Monthly Personal Car Mileage

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The standard mileage rate for reimbursement for personal car usage is the rate allowable by the Internal Revenue Service. Effective July 1, 2011 the rate is 55.5 cents per mile.

There are two types of Mileage Reimbursements:

Personal Car Mileage tired to a travel event, usually out of state, mileage to and from the airport.

Monthly Mileage is to be used for in state local travel that occurs when a traveler's normal duties require frequent travel to the same destination or within a geographical area. For example, an employee may be required to frequently drive to Lansing to meet with state officials. A blanket Travel Request covering the entire fiscal year may be created to provide documentation of prior authorization for the travel and budget the funds for mileage expenses for the whole fiscal year. That will allow monthly Expense Reports to be generated of that one Travel Request. Please seek direction from you Business Affairs Officer.

Travel Request – Overview

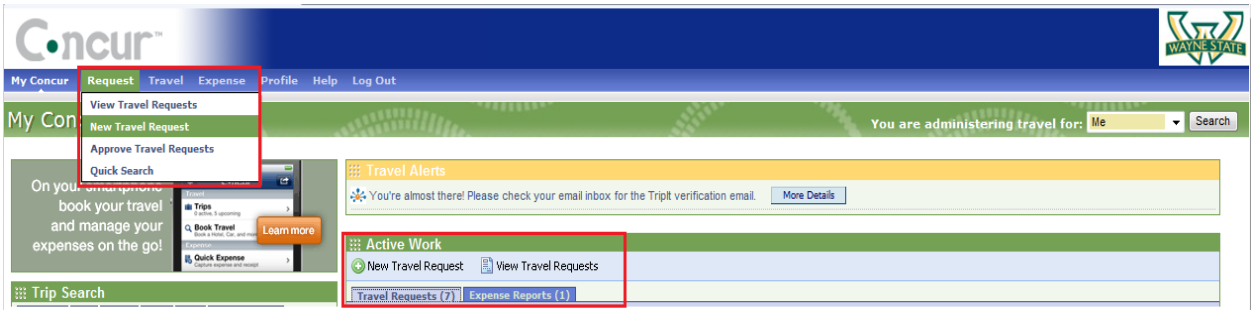
The Travel Request feature is designed to help departments control expenses by requiring employees to obtain approval before incurring travel expenses. The user creates a travel request, which includes the departure and arrival dates, the reason for the trip and the details of the different segments, such as air, car rental and hotel.

The Travel Request can also be used to project the spend of traveler's Personal Monthly Car Mileage.

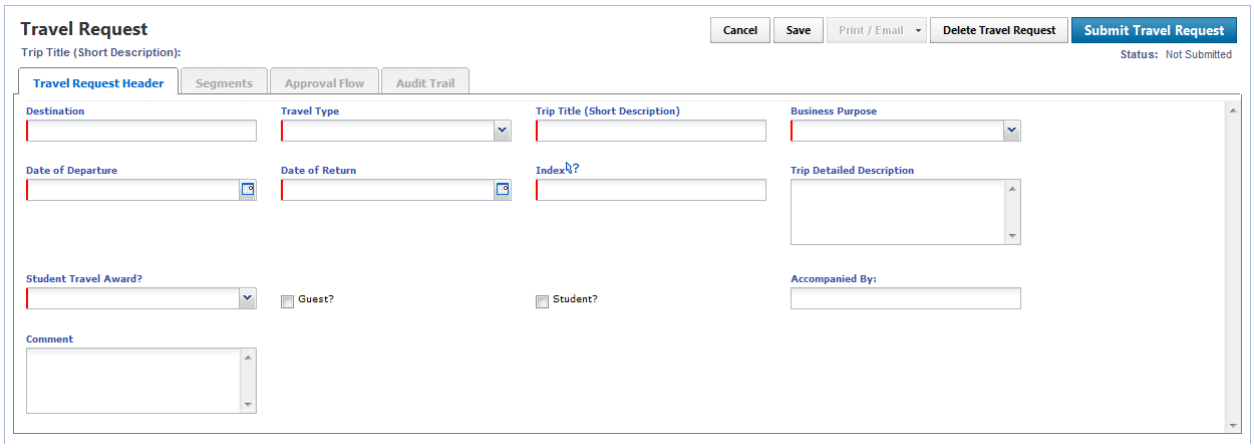
Section 1: Create a New Travel Request for Personal Monthly Car Mileage

How to...

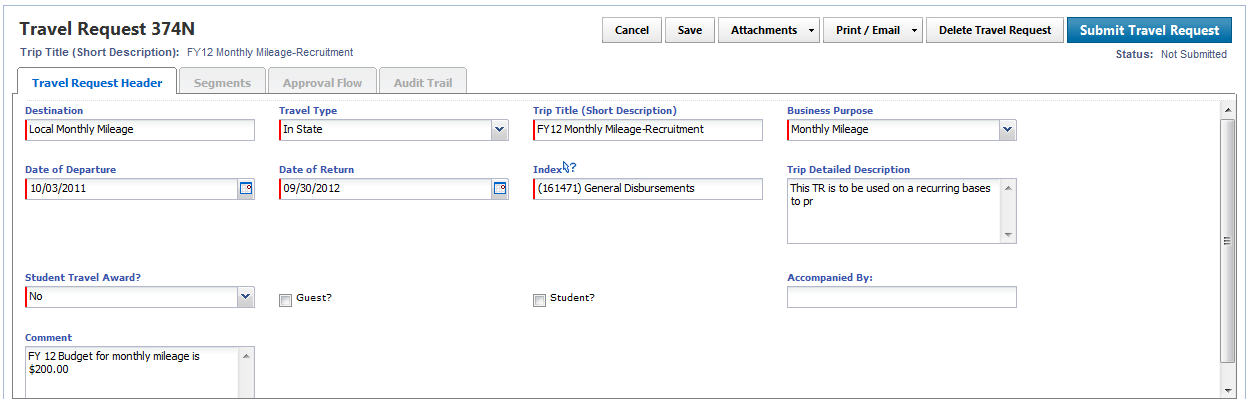
1. Either:
    - In the **Active Work** section of My Concur, click the **Travel Requests** tab and then click **New Travel Request**.
      - or -
    - On the menu, select **Request** > **New Travel Request**.



2. The **Travel Request Header** tab appears.



3. On the header, complete all required fields and the optional fields. Note: Required fields are noted by with red lines on the left side on the box. See Example below:



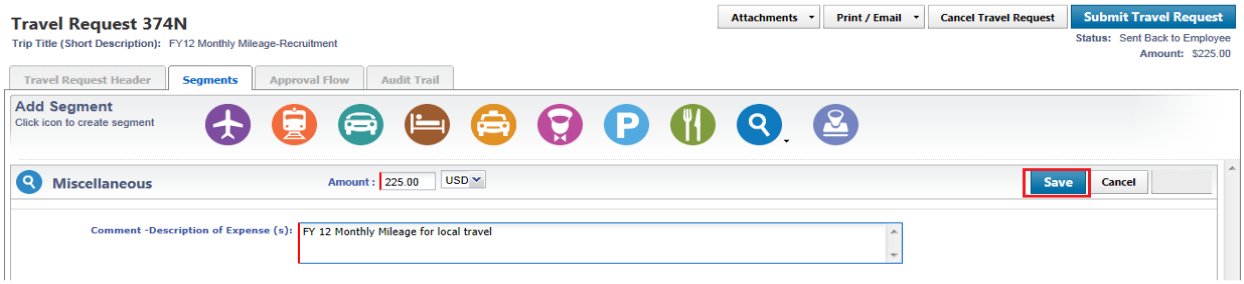
4. Click Save
    - The request ID and request name (Trip Title) appear at the top.

5. The **Add Segments** tab appears.

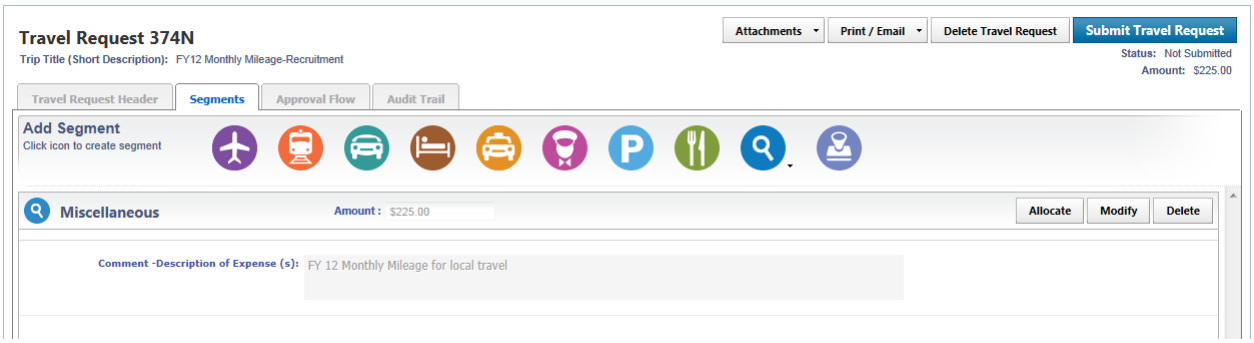
Note the following:

- Hover the mouse pointer over any icon to read its description text.
- If a policy uses the same icon twice, only ***one*** icon appears on the **Segment** tab. Click the down-pointing arrow to the right of the icon and select from the dropdown.

6. Click the icon and select **Miscellaneous**



7. In the required fields enter the overall amount estimated for mileage
   - Amount
   - Comment
8. Click **Save**

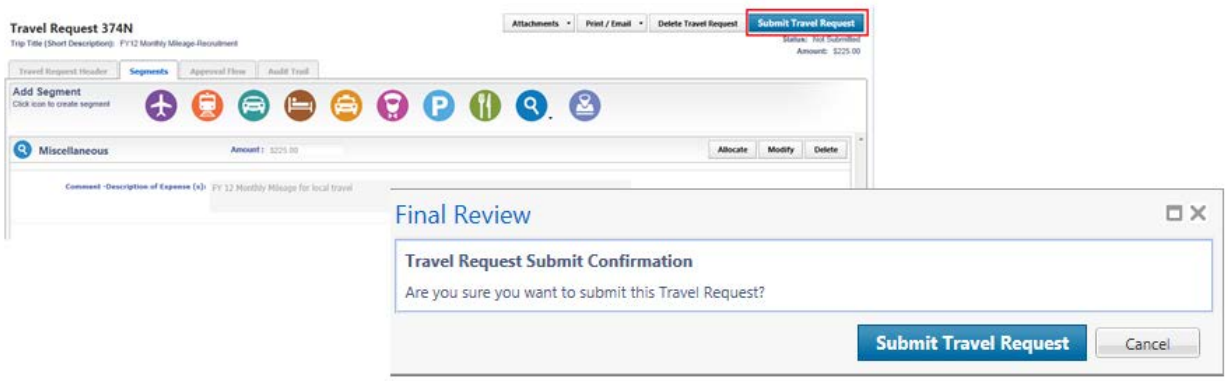


➢ To allocate the segments, click the **Allocate** button for any of the segments. **NOTE:** Segments cannot be allocated individually. *All segments on a request share the same allocations.* If any segment is allocated - all segments are allocated.

- In the **Allocations for Travel Request** window, allocate the request by percentage or amount.
- When done, click **Save**.
- Attach images, if desired. Click **Attachments,** select **Attach Document**, locate the document and **Upload**

9. Click **Submit Travel Request**.

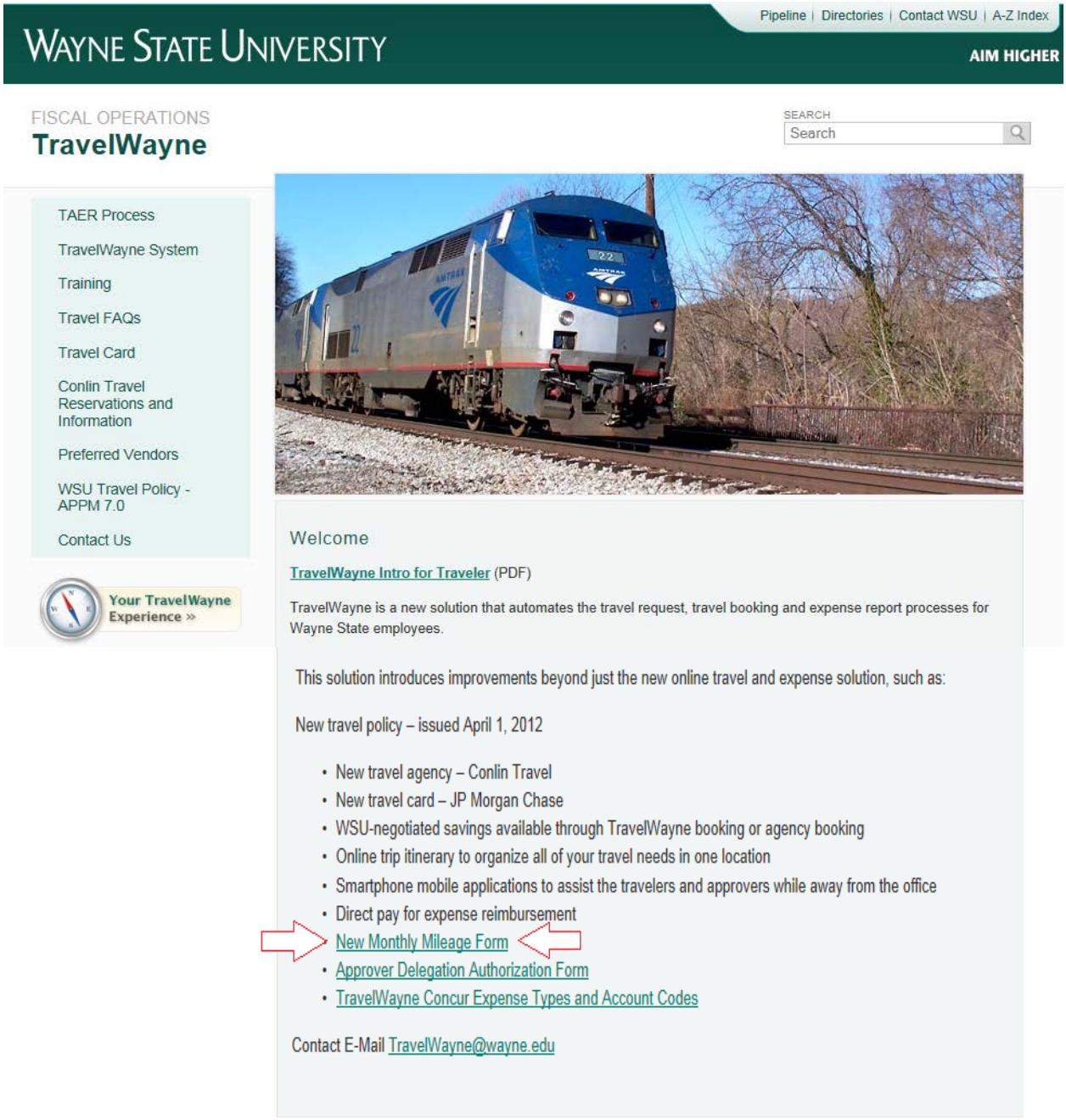
- If you would like to view the name of the approver the request will be submitted to, click the **Approval Flow** tab.
- If you would like to **add a step before this step (Another Approver)** before it goes to your approver, click the **Approval Flow** tab. Click the up arrow, enter an approver and click **Submit Travel Request**. See the **Add a Step Before This Step** Job Aid for more details located on the website.



Section 2: Where to locate and complete the Monthly Mileage Form and submit an Expense Report

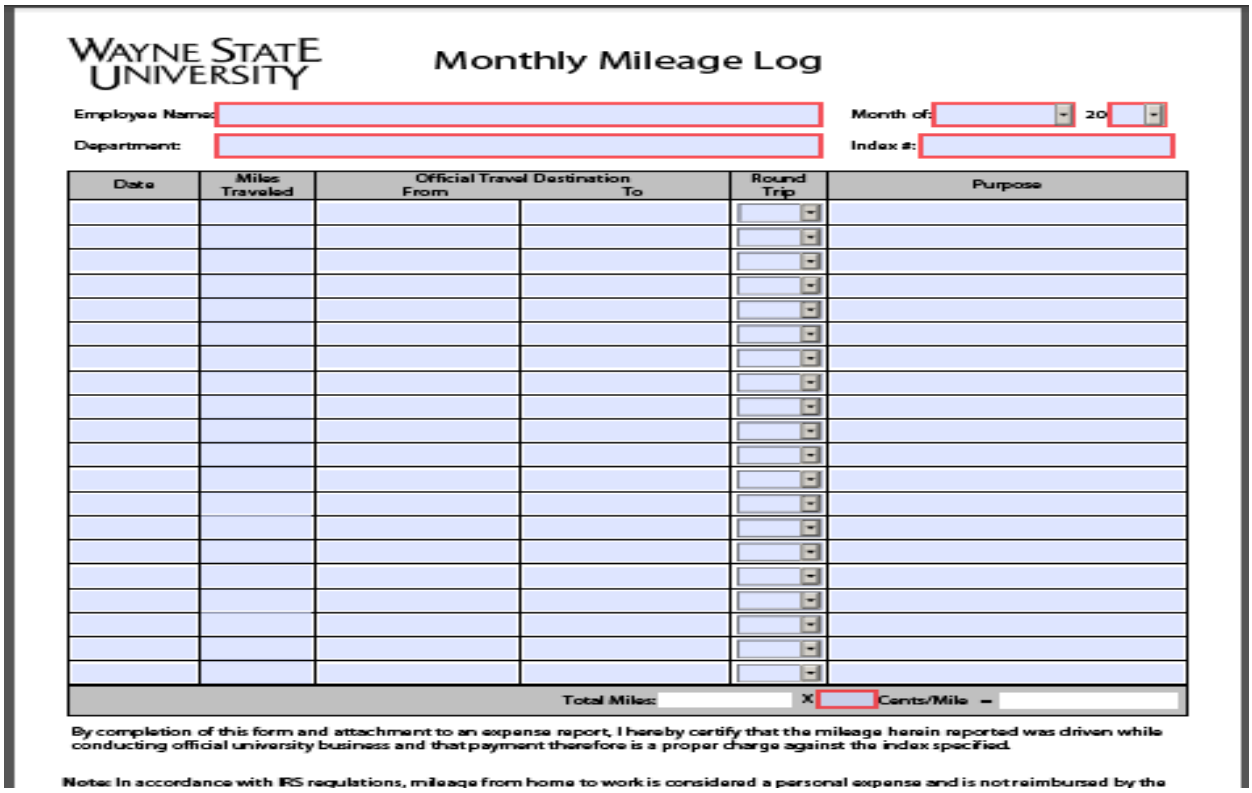
How to...

10. The Monthly Mileage form is located on the Travel.wayne.edu website.



11. Click **New Monthly Mileage Form** and the form opens.

12. Complete required fields and mile usage.
    - Record miles daily or weekly
    - Submit a Expense Report once month



WAYNE STATE UNIVERSITY

Monthly Mileage Log

Employee Name: Month of: 20

Department: Index #:

Date	Miles Traveled	Official Travel Destination From	To	Round Trip	Purpose

Total Miles: X Cents/Mile =

By completion of this form and attachment to an expense report, I hereby certify that the mileage herein reported was driven while conducting official university business and that payment therefore is a proper charge against the index specified.

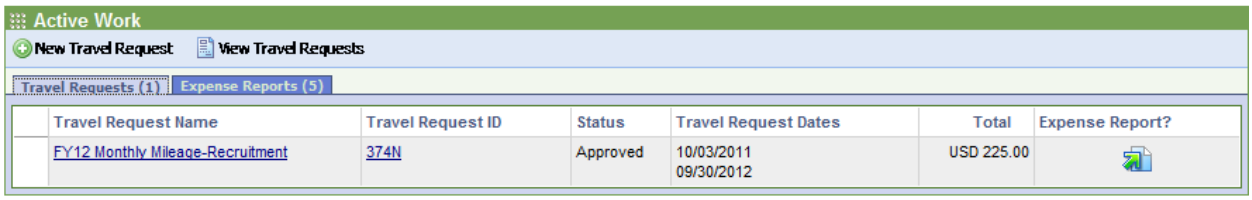
Note: In accordance with IRS regulations, mileage from home to work is considered a personal expense and is not reimbursed by the

13. **Save** the form to your desktop or hard drive.

14. Once the traveler has completed their Monthly Mileage Form for the month and is ready to create an Expense Report.

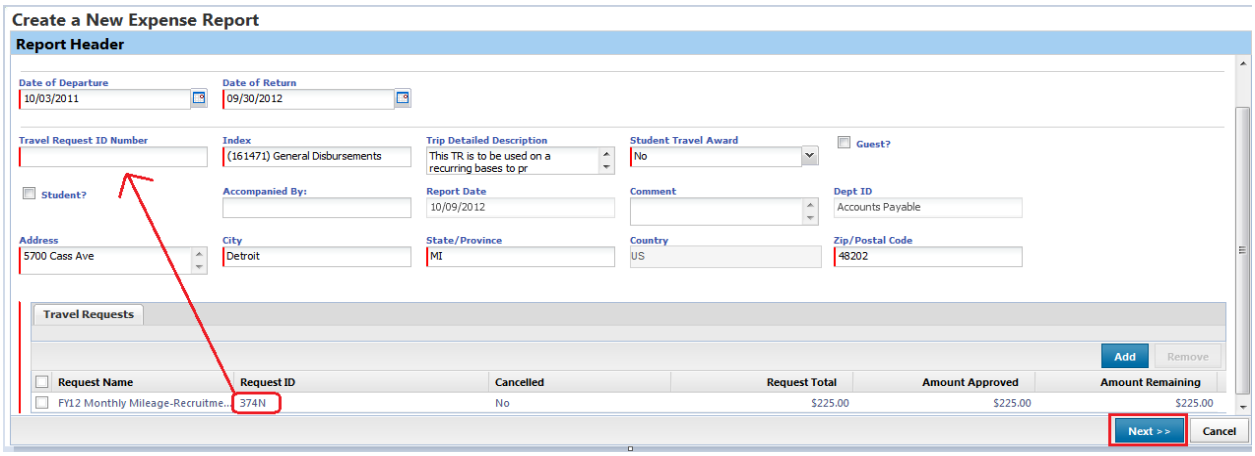
15. Either:
    - In the **Active Work** section of My Concur, click the **Travel Requests** tab and locate the Report Name
      - or -
    - On the menu, select **Request** > **View Travel Requests**.

16. **Click the Green Arrow** **to create an Expense Report**

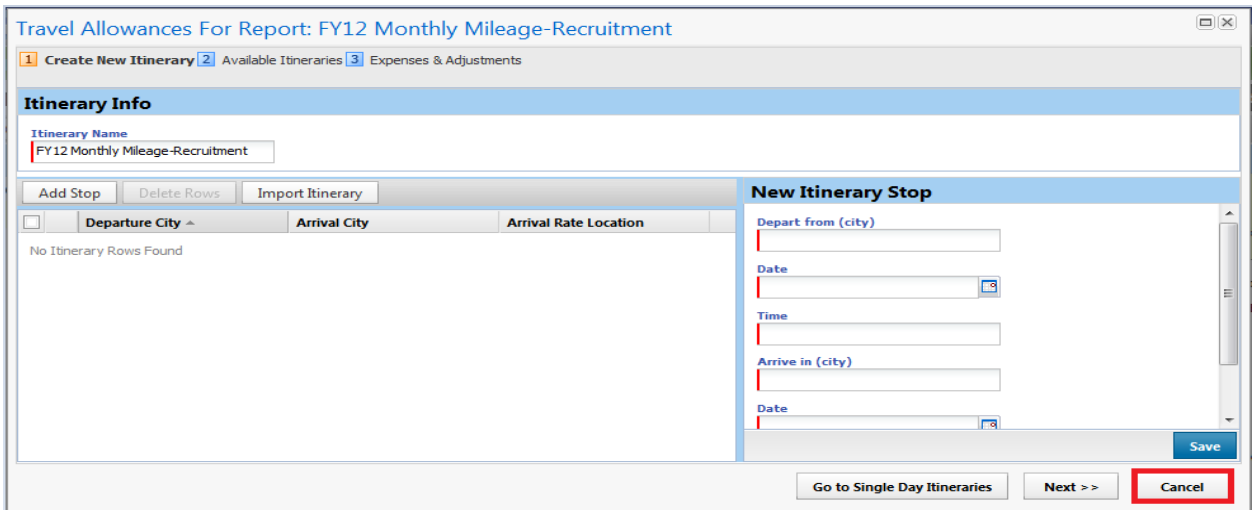


17. Locate the **Request ID** at the bottom of the page which is useally three to four characters and Enter it in **Travel Request ID Number** field

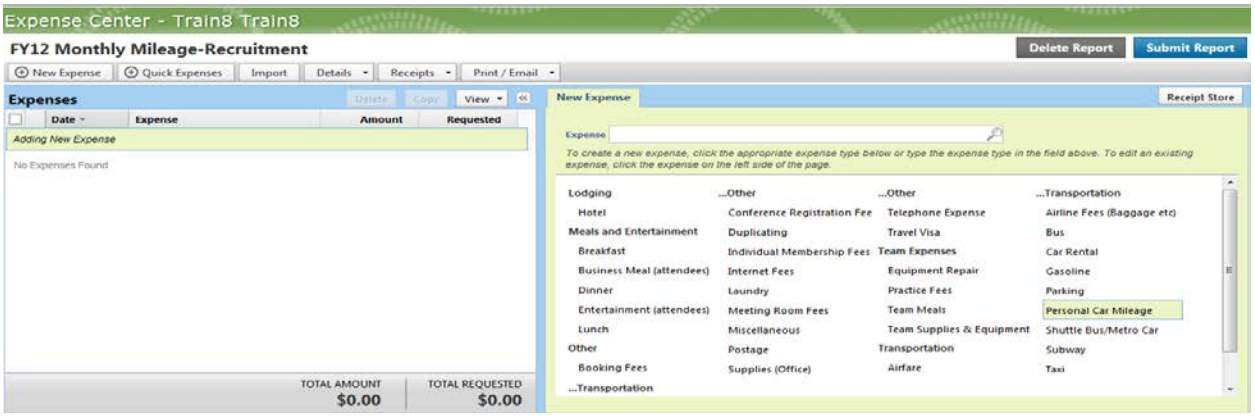
18. Click **Next**



19. The Travel Allowances screen appears, Click **Cancel**



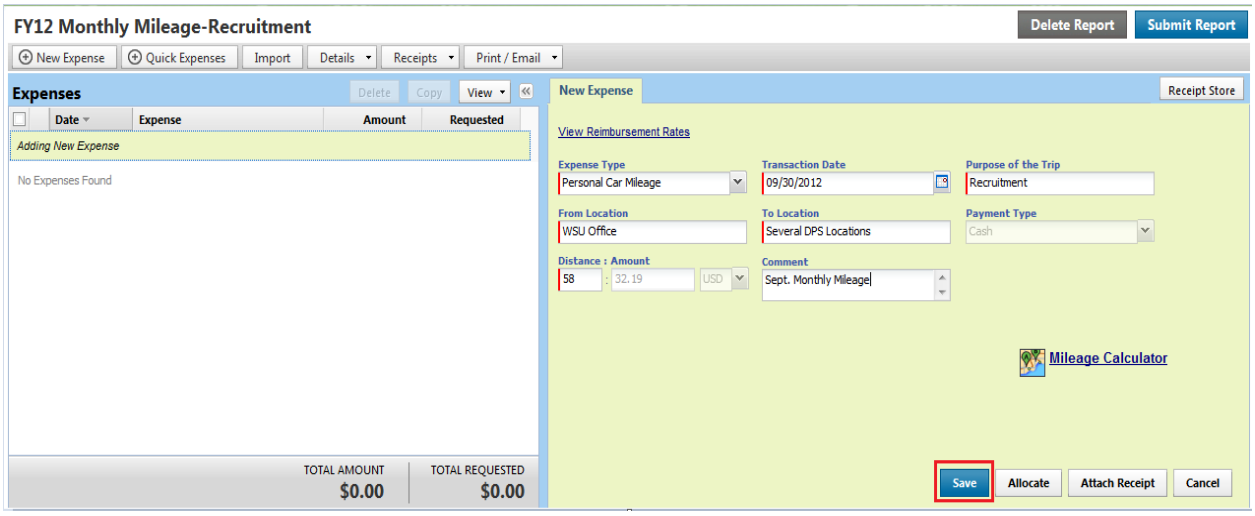
20. The Expense Center appears, on the left hand side the **New Expense** listing



21. Either
    - Click the Personal Car Mileage
      -or-
    - In the Expense Sreach box, begin typing the frist three letters of Per

22. The **Expense Type** form appears, **Enter** the required fields
    - Enter the total business miles in the Distance field
      - OR –
    - Use the **Mileage Calculator for Single Trip** and you can enter your point-to-point routes
    - Expense calculates the reimbursement amount based on the miles and the reimbursement rate set by the IRS.

23. Click **Save**



24. The **Personal Car Mileage expense** is now referenced under the **Expenses Section**
    - Showing the Total Amount and Total Requested Amount Due to the Employee

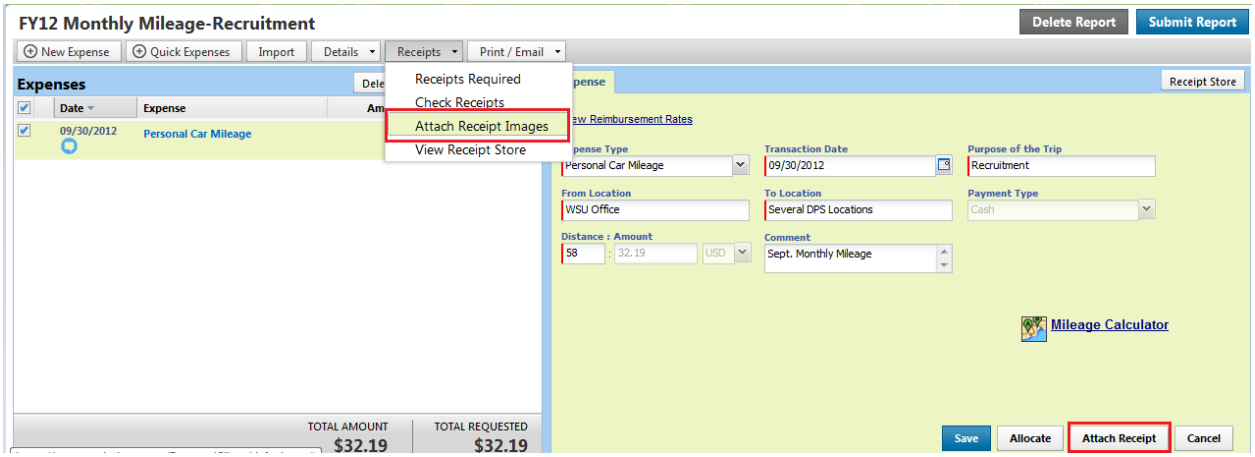
25. Attach the **New Monthly Mileage Form** for support.

Either

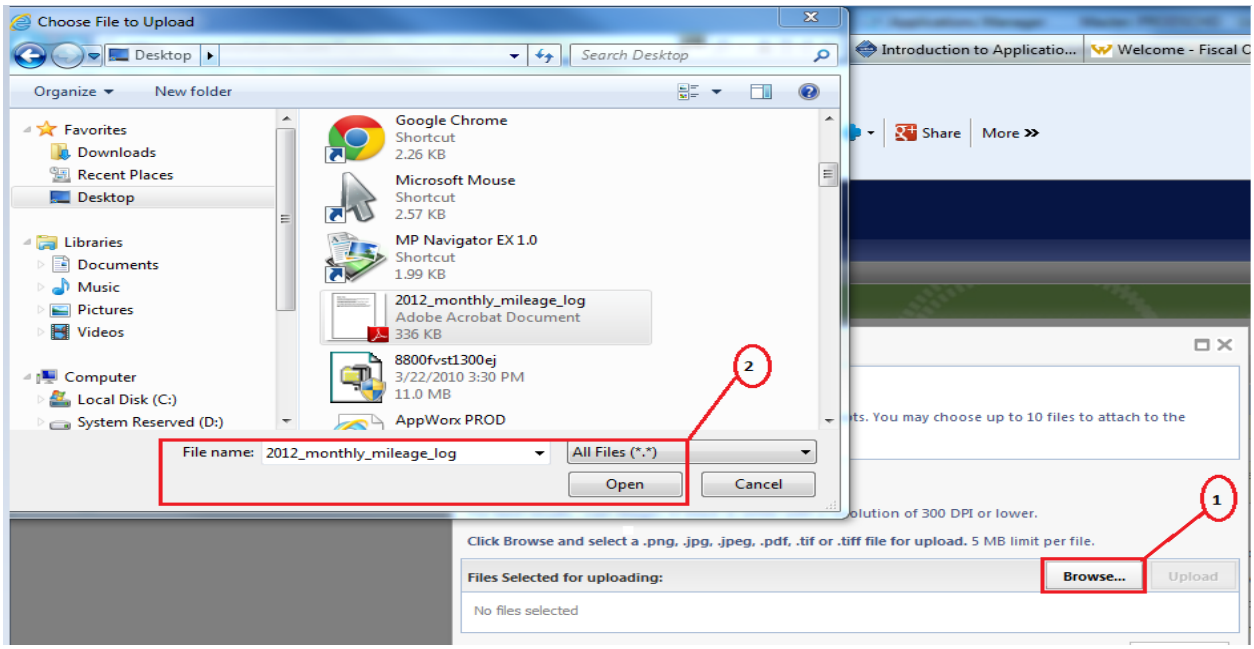
- On the Menu Bar Click the **Recepits** tab and select **Attach Receipt Images**

-or-

- Click the **Attach Receipt,** while on the **Personal Car Mileage** expense entry form



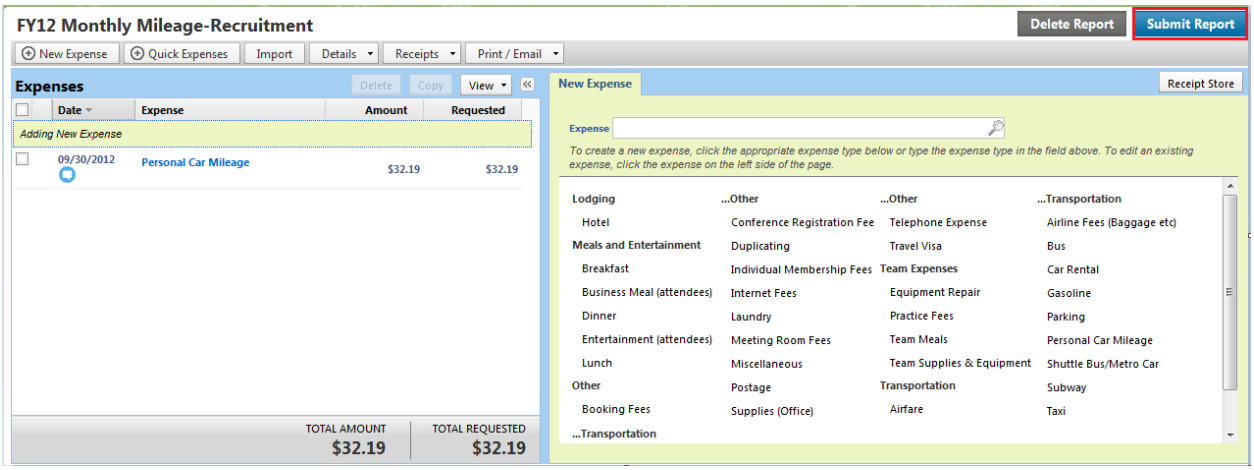
26. The upload document form appears:
    1. Click **Browser**
    2. Locate the Monthly Mileage form on the your desktop or hard drive and click **Open**



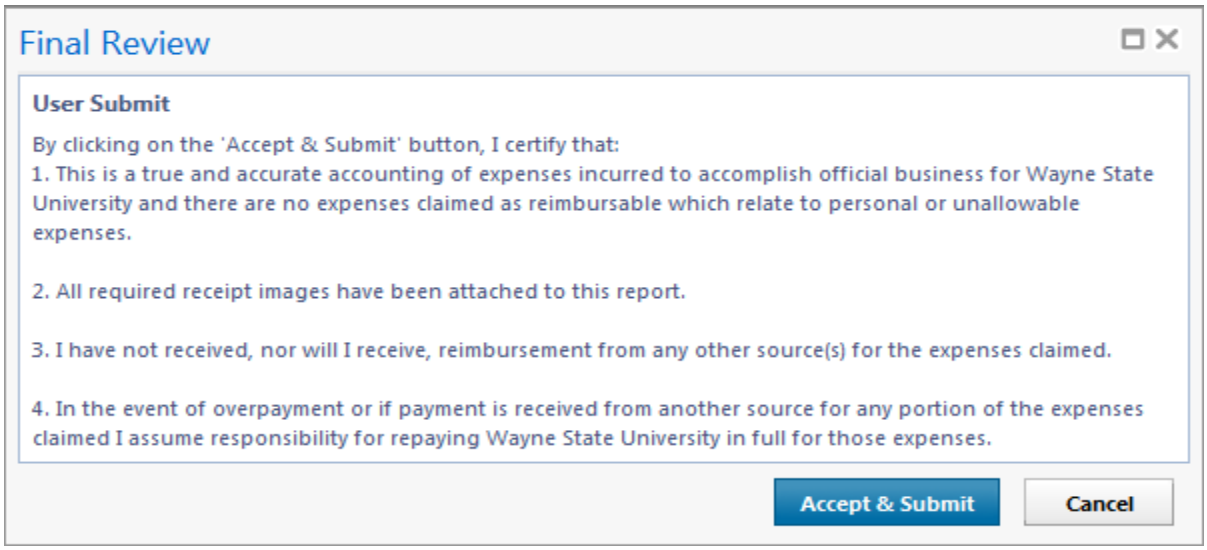
3. Click **Upload**
4. Click **Close**

27. Click **Submit Report**.

- If you would like to view the name of the approver the request was submitted to, click the **Details** tab and Select **Approval Flow** tab.
- If you would like to **add a step before this step (Another Approver)** before it goes to your approver, the click the **Approval Flow** tab. Click the up arrow, enter an approver and click **Submit Report**.



28. Click **Accept & Submit**



29. Review the Report Submit Status and Click **Close**

YOU HAVE SUCCESSFULLY COMPLETED AN EXPENSE REPORT FOR MONTHLY MILEAGE!!!

What's Next???

A. The Expense Report has been submitted and pending Approval of the Business Manager.

Note:

The Traveler or their delegate may recall an expense report at any time ***prior*** to a report status of Approved or *Pending Payment*. To do this the user clicks the **Recall** button that displays when the report is opened for viewing from any page. There is no limit to the number of times a report may be recalled.

To recall an expense report:

1. Open the expense report you wish to recall.
2. Click the **Recall** button. A confirmation message appears.
3. Click **Yes** to confirm recall of the expense report.
4. Click **OK** in the **Success!** message box.

When a report is recalled, the following actions can be taken by the user:

- Edit and resubmit the expense report.
- Delete the expense report.

B. Once the expense report is approved, the traveler will receive a direct deposit in 3 business days.