

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System TM – Travel Management

Create Monthly Travel Expense Report

This set of instructions is specific for those who have recurring day trips. It is requested that requests for reimbursement be submitted monthly.

Creating an expense report without a travel approval request is only authorized for the following non-overnight trips:

- Student Recruitment – Admissions Department;
- Student Teaching Supervisors;
- Off-Campus Teaching;
- Non-overnight visits to campuses (shared services/integrated employees);

Log into the portal...

The screenshot shows a web browser window displaying the PASSHE Self-Service Portal. The browser's address bar shows "PA State System of Higher Education". The page features a blue header with the "SELF SERVICE PORTAL" logo on the left and the PASSHE logo on the right. Below the header, there is a navigation bar with "www.PASSHE.edu" and "Account Self-Service". The main content area is divided into two sections: on the left, a photograph of a building with a golden dome; on the right, a login form titled "Enter Your Account Information". The form includes fields for "Username:" and "Password:", an "Enter Portal" button, and a link for "Forgotten / Expired Password?". At the bottom of the page, there is a footer with the following text: "© Pennsylvania State System of Higher Education, 2986 North Second Street, Harrisburg, PA 17110. The home of PASSHE Employee Self-Service, Manager Self-Service & eTime. If you need assistance, contact your university help desk."

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From the ESS tab, click on either of the 2 provided Travel Management links.

SELF SERVICE PORTAL Pennsylvania State System of Higher Education
Welcome Nicole Richards

Home | **Employee Self-Service** | Manager Self-Service | SAS Internal Tools
Overview | Personal Information | Benefits | Leave & Time | Payroll | **Travel Management** | My First Days | Help Documents

Overview

Welcome Nicole to Employee Self-Service!

Areas of Employee Self-Service

Personal Information
Display your personal data, addresses, and bank information. Here you can also manage your ethnicity information.

Benefits
Display your benefits participation information and access the online benefits enrollment system.

Leave & Time
Within this section of Employee Self-Service you may view your leave balances and a complete record of all absences you have submitted to date. If you have an Employee Leave Request system, you may access it here as well.

Payroll
Access online copies of your printed pay statements, manage your W-4 withholding, view/change your W-2 election, and view your online W-2 form, if you have one.

Travel Management
This area of ESS provides employees with functions to create and manage travel requests and expense reports.

My First Days
For New Employees Only -- The My First Days application of ESS will allow new employees to the Pennsylvania State System of Higher Education to perform their HR personnel file. Here you can complete activities such as: setting up direct deposit, enrolling in your medical benefits and retirement plan(s), completing your direct deposit information, and completing your direct deposit information. New employees should run this application within 30 days of your date of hire.

Help Documents
Here you will find all supporting Employee Self-Service (ESS) help documentation about every feature and tool of the ESS system. This document repository is intended to help you if you have a question about an ESS application's use.

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Click on “Create Expense Report” to get started.

Home | Account Alerts | **Employee Self-Service** | Manager Self-Service | eTime | Materials Management | Business Intelligence

Overview | Personal Information | Benefits | Leave & Time | Payroll | **Travel Management** | My First Days | Help Documents

Employee Self-Service >> Travel Management

This page will provide you with information about each available Employee Self-Service (ESS) application for you to access in this application you have chosen. A link to this sub-sections overview page will be shown to the left of the ESS application that you can

Available Applications

My Trips and Expenses

This page serves as the central management point for all your trips and expense reports. Here you can view, change, copy, or create new travel requests and/or expense reports.

Create Travel Request

You can use this quick link to create a travel request to be approved by your supervisor.

Create Expense Report

You can use this quick link to create an expense report for a trip without a previously submitted travel request.

Unlock Employee Record

Use this tool if you receive a message stating your employee record has been locked.

My Employees

Travel assistants can use this page to create travel requests and expense reports for other employees in their department.

Select Non-Overnight Travel schema and click Start:

SAP

Employee: [REDACTED]

Start

Available Travel Requests / Plans

Reset Selection

Trip Number	Trip Begins On	Trip Ends On	Destination	Trip Country	Reason
<input type="radio"/> 1000013791	10/18/2019	10/18/2019	Barn at Frosty Valley	US	Leadercast Women Conf
<input type="radio"/>					
<input type="radio"/>					
<input type="radio"/>					
<input type="radio"/>					
<input type="radio"/>					

Schema Selection

Domestic - Overnight

International - Overnight

Non-Overnight Travel

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Create Expense Report main screen. This screen is very similar to the Travel Request screen with the exception of a few items.

Create Expense Report

1 2 3 4
General Data Enter Receipts Review and Send Completed

Employee [REDACTED] Schema: Non-Overnight Travel

< Previous Step Enter Receipts > Save Draft

Calendar of Trips Attachments (0)

General Data

* Start Date: [] [] 00:00
* End Date: [] [] 00:00
Posting Date: []

Destination

* Trip Country: Standard Conus Rate, USA Trip Region: [] Standard Conus Rate, USA
* Destination: []

Additional Destinations: No destinations entered Enter Additional Destinations

Additional Information

* Activity: []
* Reason: []
Comment: []

Cost Assignment: 100.00 % Cost Center 1011030202 (Fin & Bus Services), Funds Center 1011030202 (Fin & Bus) Change Cost Assignment

Mileage

Total Distance: 0 Mile Enter Mileage Details

< Previous Step Enter Receipts > Save Draft

Required fields are marked with an asterisk (*).

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General Data

▶ Calendar of Trips ▶ Attachments (0)

General Data

Start Date: * 00:00

End Date: * 00:00

Posting Date:

- Enter the Start Date/Time and End Date/Time for the entire reimbursement period.
- In this case, the start and end date will both be the end date of the period (ie, last day of the month)
- Posting Date – leave blank. This is the posting date for Funds Management and will default to the trip end date.

Destination

Destination

Trip Country: * Standard Conus Rate, USA Trip Region: Standard Conus Rate, USA

Destination: *

Additional Destinations: No destinations entered

- Enter the main destination or first destination if the trip involves multiple destinations. If you are visiting multiple local destinations, you may select Bloomsburg as your destination.
 - Be careful when selecting your trip region code; inaccurate selections may result in your trip routing incorrectly through the approval process.
- Trip Country – USA will be the default.
- Trip Region – Enter manually if you know the region code or use the search* feature. (see below)
- Destination – enter specific locations, name of venue or any other relevant information.

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Search Feature:

- To utilize the search feature , click 



Destination


*Trip Country: Trip Region: 


*Destination: 






- The following will appear. Complete fields indicated as shown; click “Go” to filter your results
 - Note that it is important to complete these fields exactly as indicated in order for the filter to work accurately; you need to capitalize both letters in the state abbreviation and include the asterisk; capitalize the first letter of the city and use the asterisk
- Double click the destination to select it and populate the Trip Region field

Select: Trip Region  




Hide Advanced Search Result <= 500 items 

Trip Country/Group:  Country/Group/Region: 

Name of Trip Country: 

Items (1)

Trip Country	Trip Region Code	Name of Trip Region
<input type="radio"/> US	PA/MI	Mansfield, PA



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Additional Information

* Activity (Expenses):

* Reason:

* Estimated Costs: USD

Comment:

Advances:

Cost Assignment:

Additional Information

- Activity – Purpose of travel. Make a selection from the drop down list. The General Ledger (GL) account is determined based on the Activity selected here.

Additional Information

* Activity:

* Reason:

Comment:

Cost Assignment:

Mileage

Total Distance:

- Reason – Provide reason for travel.
- Comment – Provide the following relevant information:
 - Purpose of Travel;
 - Passengers;
 - Details/Justifications for Expenses;
- Cost Assignment – The cost assignment will default from your HR Master Data. If you wish to override the default , click on “Change Cost Assignment”

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Additional Information

* Activity: Teaching Travel

* Reason: student teachers

Comment:

Cost Assignment: 100.00 % Cost Center 1011030202 (Fin & Bus Services), Funds Center 1011030202 (FI) Change Cost Assignment

- Update the information by typing the desired funds center into the field shown below.

Cost Assignment for Trip

New Entry Check Delete

Cost Assign (%)	Company Code	Business Area	Accounting Object	Accounting Object Value
100.00	State System of High Ed	Bloomsburg	Cost Center	1011030202 - Fin & Bus Se...

Cost Center: 1011030202 Accept Accept and New Entry Check Delete

- Once you've entered the appropriate cost assignment info, click on Accept to return to the main screen.
- Mileage – Click on “Enter Mileage Details” to enter data
 - The date of travel will populate based on the date indicated earlier; The “End Location” will populate based on earlier input;
 - Miles driven will be taken from your log;
 - When all details have been entered, click Accept to return to the main screen

1
 2
 3
 4
 5

General Data **Mileage Details** General Data Enter Receipts Review and Send Completed

Employee: ██████████ Schema Non-Overnight Travel Start Date 12/31/2021 End Date 12/31/2021

Previous Step
 Accept
 Exit to General Data
 Save Draft

Calendar of Trips

Total Distance Driven: 0 Mile

Mileage Details

New Entry Copy Delete

Date	Miles Driven	Passengers	Start Location	End Location
12/31/2021	462	No passengers	Bloomsburg	Visit Mansfield and LHU

Comment: Monthly Mileage per attached log

Accept
 Accept and New Entry
 Change Cost Assignment
 Copy
 Delete

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- Upload your mileage log as an attachment

Calendar of Trips Attachments (1)

Delete Attachment

Title	Added By	Added On
adv av	Peters , Danielle Marie	08/20/2015

Add Attachment

Type: File Link Note Business Document

File Path: **Browse...**

Create Expense Report

1. General Data → 2. Enter Receipts → 3. Review and Send → 4. Completed

Employee: ██████████ Schema: Non-Overnight Travel Start Date: 01/16/2015 End Date: 01/16/2015

< Previous Step **Review >** Save Draft

Receipts in This Expense Report

No.	Status	Expense Type	Receipt Amount	Receipt Currency	Receipt Date
001	●	Parking	50.00	United States Dollar	01/16/2015
002	●	Parking	20.00	United States Dollar	01/16/2015

< Previous Step **Review >** Save Draft

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If all looks good on the below screen, you can **Save a Draft** of the Expense Report or **Save and Send it for Approval**. Click on the appropriate radio button and then the Save button at the bottom of the screen (this button will change based on the radio button you select).

If you wish to display or print the request, click on the button Display Request Form.

[← Previous Step](#) [Save and Send for Approval](#)

Final Action

Save Draft I only want to save my expense report and send it later

Save and Send for Approval I want to save my expense report and send it now for further processing

I confirm that all expenses were incurred by and on behalf of the company

Summary

Total Mileage	112.13 USD
Total Individual Receipts	70.00 USD
Total Travel Expenses	182.13 USD
Amount Reimbursed	182.13 USD
Amount Paid Out	182.13 USD

Cost Assignment

132.13 USD Company Code SSHE (State System of Higher Ed), Business Area 10 (Bloomsburg), Cost Cent

50.00 USD Company Code SSHE (State System of Higher Ed), Business Area 10 (Bloomsburg), Cost Cent

[Display Expense Form](#)

[← Previous Step](#) [Save and Send for Approval](#)

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The below screen will then appear acknowledging that the Expense Report was saved and provide the tracking number.

You have the option to display or print the expense form again at this point. Please note the workflow approval log does not appear on the form until the Expense Report is Saved.

Create Expense Report



Employee [REDACTED] Schema Non-Overnight Travel Start Date 01/16/2015 End Date 01/16/2015

< Previous Step Save and Send for Approval

✔ Expense report 1000000210 was saved

✔ 100.00 % will be assigned acc. to trip costs assignment guidelines

Display Expense Form

< Previous Step Save and Send for Approval