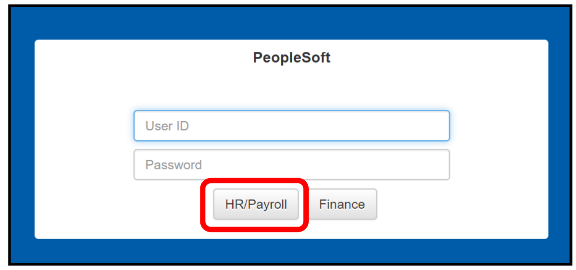
Mileage Reporting eForm—Create/Update Profile

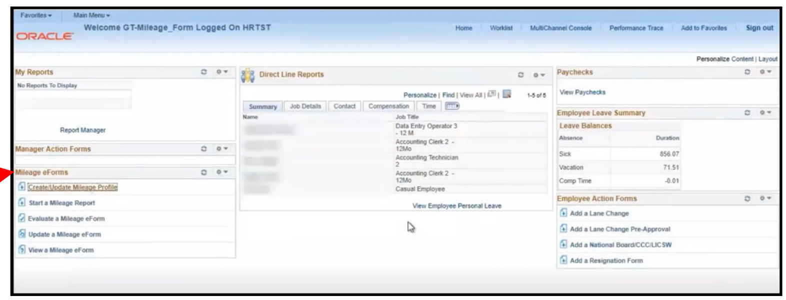
Introduction

Employees who use their own vehicle for SPPS business may be eligible to have their mileage reimbursed. See the SPPS policy [Mileage Reimbursement] for criteria and further information.

Login to PeopleSoft and Find the Mileage eForms



1) Go to the SPPS PeopleSoft [login page]
   a. Enter your User ID
   b. Enter your Password
   c. Click HR/Payroll to access the human resources side of PeopleSoft
2) Find the Mileage eForms section
   a. If you haven't customized your home page, this should be in the left column

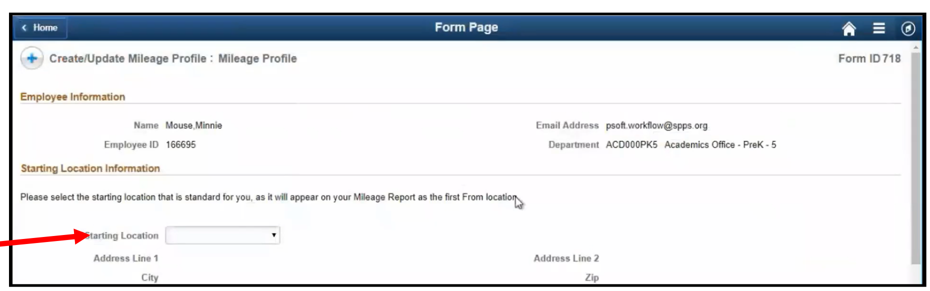


Create/Update Mileage Profile

If this is your first time using the mileage e-Forms, you need to create your profile. If you've used the mileage e-Forms but have had a change to your budget codes, you'll need to update your profile.

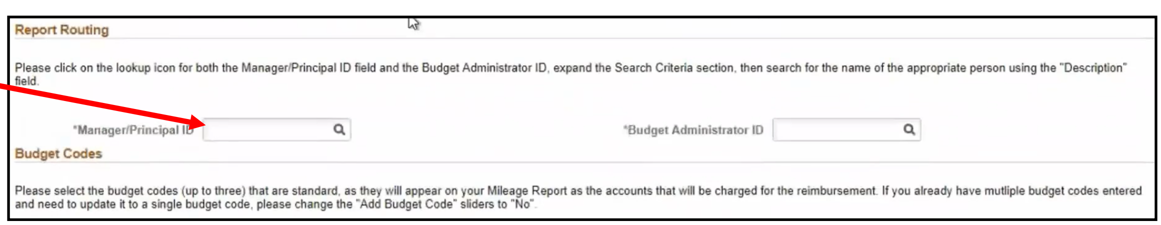
Open Your Profile

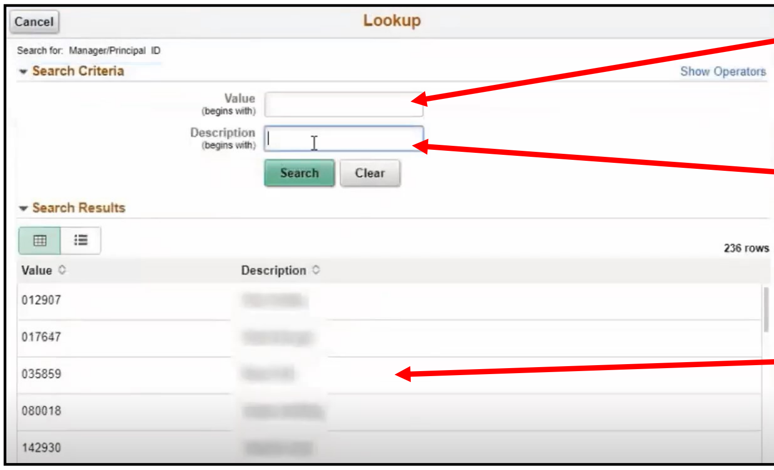
1) Click **Create/Update Mileage Profile**
2) If you are updating your existing profile, the form will be populated, and you only need to update the fields that have changed; for new users, the form will be completely blank and required fields are marked with an asterisk
3) Select your usual starting location from the drop down menu



Report Routing Section

1) Click in the Manager/ Principal ID field to open a search for your manager/ principal





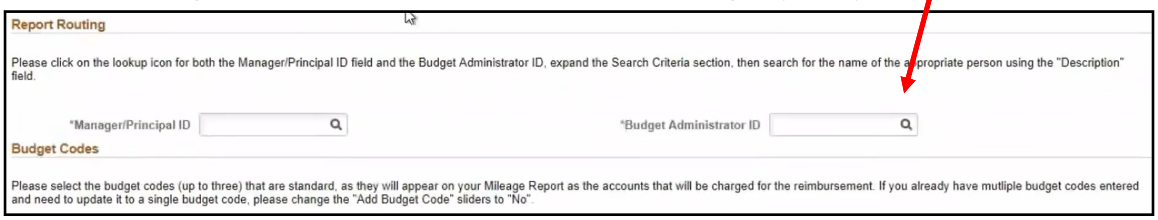
a. To search by first name, type the first few characters or full first name (eg: ste or steve), and click **Search**

b. To search by last name, use the % sign as a wild card to fill in for the first name, immediately followed by the last name (eg: % rogers), and click **Search**

2) Click to select the correct name from the search results

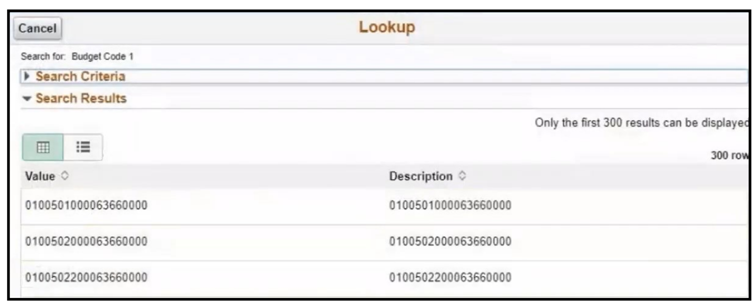
3) Repeat steps 4-5 for the budget administrator

a. If you only report to one budget code, use the same code as the manager/principal



b. If you report to two budget codes, plug your second manager/principal in the budget administrator field

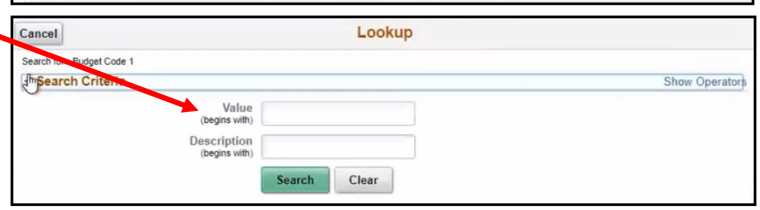
Budget Codes Section



1) Click the **Budget Code** field to search for your code

a. You can scroll through the list

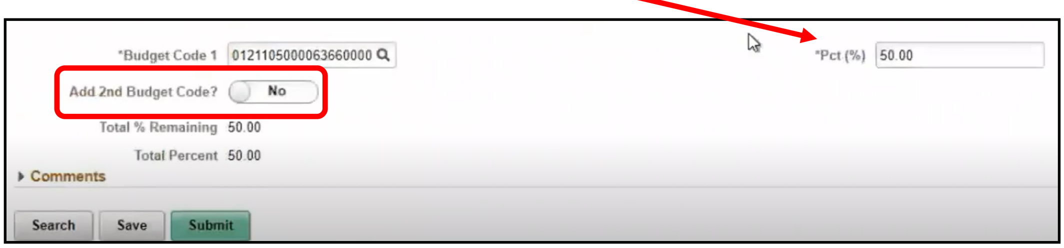
b. Or click **Search Criteria** to enter your budget code or part of your budget code to search for it



2) Click to select the correct code

a. If you don't see your budget code, contact your accountant

3) Enter percentage at this code



4) If you need to use split budget codes, change the *Add 2nd Budget Code?* slider to **yes**

a. The option to add budget codes will only show up if the entered total is less than 100%

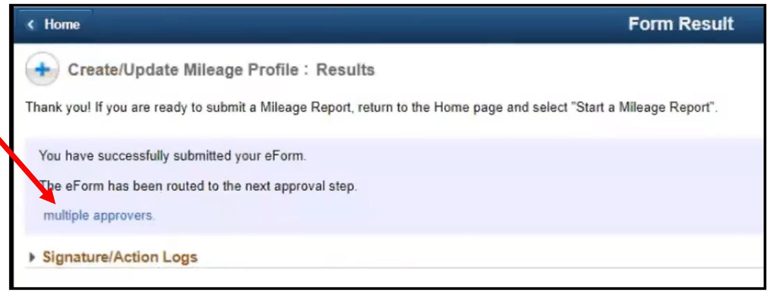
b. You can enter up to three budget codes

c. Whether you use one or more budget codes, all percentages must equal 100

Submit and Wait for Approval

1) Once all budget codes are entered and the percentage totals 100, click **Submit**

2) You will get a submission confirmation notice; if you click on the **multiple approvers** link, you can see who the profile has been routed to
   a. The new profile will be routed to accounting to confirm the budget codes are accurate

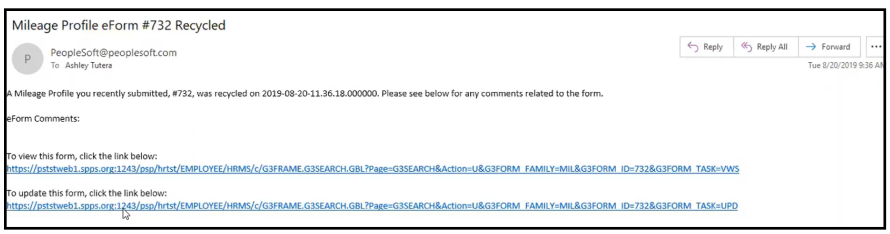


3) In the *Signature/Action Logs* you'll see the initiated transaction

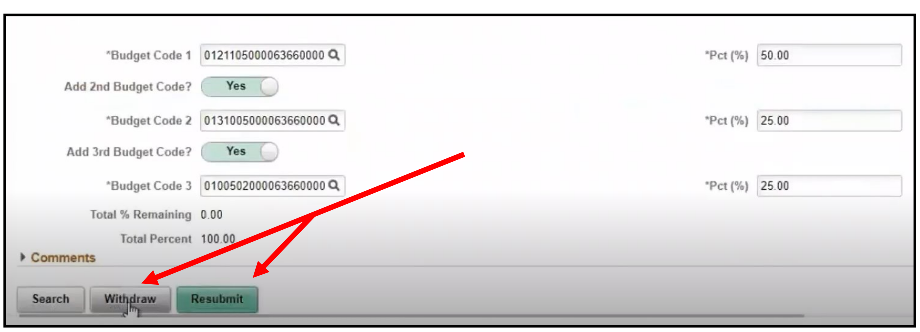
Note: your profile will not be ready to use until it has been approved by your accountant. If you immediately go back in to the Create/Update Mileage Profile, it will be blank for new users and show the old information for past users.

Approval and Corrections

1) The accountant will receive an e-mail or worklist item alerting them of a profile to review and approve
   a. Accountants have the ability to make code changes if they identify a problem
   b. Accountants can also add reviewers if different budget codes require different reveiwers
2) You will receive an e-mail once the profile has been approved and is ready to use
3) If there's a problem with the form, the accountant can recycle it, returning it to you for revision



   a. This will generate an email notice and a worklist item to notify you to address this
   b. Follow the link or navigate to the form (from your PeopleSoft home page, click **View Mileage Form**) to make changes
   c. Click **Resubmit** to reroute the revised form for approval, or click **Withdraw** to terminate the form



4) Any changes will need to be approved by the accountant before the profile will be active
5) You will receive an email notice once your profile has been approved and is ready to use.