

Mileage Reimbursement Process

Paylocity has a nice tutorial that walks you step-by-step through entering mileage and we will do our best to fill in the gaps for anything missing. When you have mileage to submit, you will want to follow the procedures in this tutorial (Paylocity has done a really good job with the tutorial!) – [Track Mileage](#).

Step 1: Log in to Paylocity

Step 2: Navigate to the Menu and Open Expense

Step 3: Click Expenses and click the + icon in the bottom right corner

Step 4: Select Category Mileage

Step 5: Fill in the details of your trip

Step 6: Make sure to save your newly created expense

At this point you're halfway there! The above steps have created an individual mileage expense, but we do not need supervisors to approve each of these one by one. **Instead, we are asking employees to submit an expense report every Friday that will include all mileage reimbursements for that respective week.**

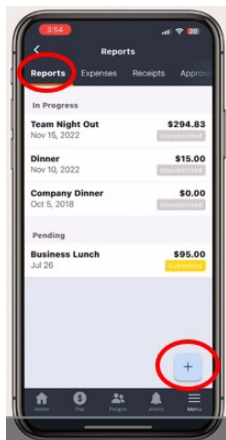
For example, please submit your expense report on Friday, February 23rd that will be for the week of February 19th.

So what's next? Each of those expenses you created above will need to be added to your weekly expense report. There is a tutorial to follow online ([Submitting an Expense Report](#)) but they do not use a mileage reimbursement as the example. We recommend watching the tutorial, but we are also including the steps with pictures below that hopefully you will find helpful. To submit an expense report, you will need to do the following:

Step 1: Log in to Paylocity

Step 2: Navigate to the Menu and Open Expense

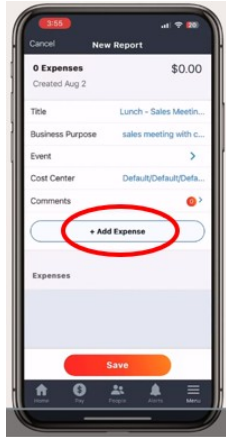
Step 3: Select Reports and click the + icon in the bottom right corner



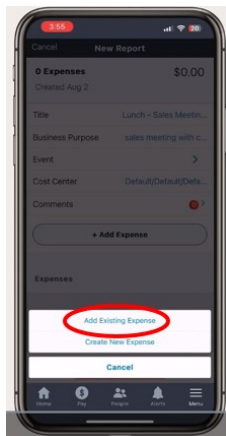
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Step 4: Fill out Title and Business Purpose which will name the Expense Report you are submitting to your Supervisor.

Step 5: Click + Add Expense

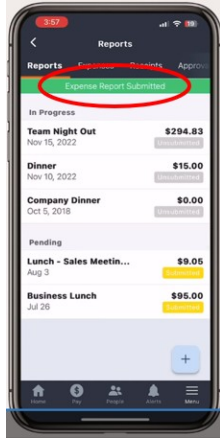


Step 6: Click Add Existing Expense



Step 7: Select the mileage reimbursements you previously created and then Save the report. You can either "Save for Later" or "Save & Submit". Once you hit Save & Submit, your supervisor will be informed that there is an expense report that requires their approval. You're done once you see the Expense Report Submitted banner.

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Supervisors- you're not done yet! Each week that the Council has a payroll, we are asking all Supervisors to approve the expense reports that their team has submitted to them for the last 2 weeks. Paylocity gives a really nice tutorial on how to complete the approval process- [Approve Expense Reports](#). Without your approval, the expense report will not be paid by Paylocity.

We hope this streamlines the process for everyone and maximizes the efficiency of the tools that we have in place here at the Council. If you have any questions or concerns, do not hesitate to reach out to the finance team.