Employee Business Expenses

A step-by-step guide for employees entering and submitting business expenses in Self Service.

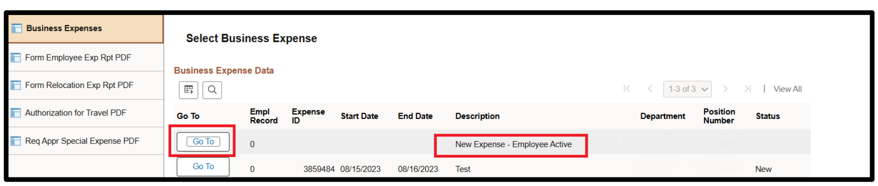
Why This Matters

Accurate business expense entry and labor distribution ensure expenses are charged to the correct funding source and reimbursed on time.

Accessing Business Expenses

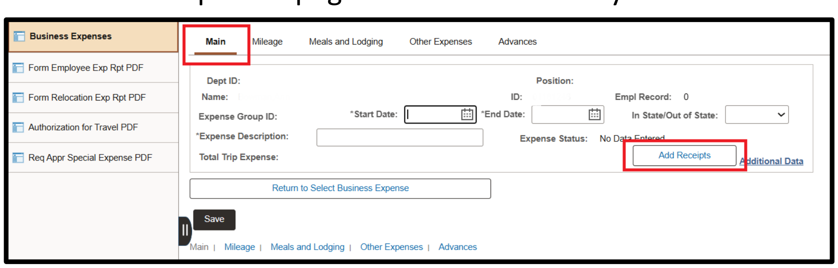
1. Sign in to the Self Service portal.
2. Select the Business Expense tile.

3. Select the **Go To** button to begin a new business expense.



Entering Business Expenses

1. To begin a business expense, enter the trip or expense dates on the Main tab of the Business Expenses page. This is also where you can add receipts and enter a description.



- Enter a description.
- Attach receipts if required.

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- Select expenses on the appropriate tab:

  Mileage
  Meals and Lodging
  Other Expenses

Note: At least one expense must be entered before the expense report can be saved.

Note on IRS Mileage

Mileage reimbursement is automatically calculated using the IRS mileage rate in effect on the date of travel. If your agency authorizes a different mileage rate, enter the approved rate and the system will recalculate the reimbursement.

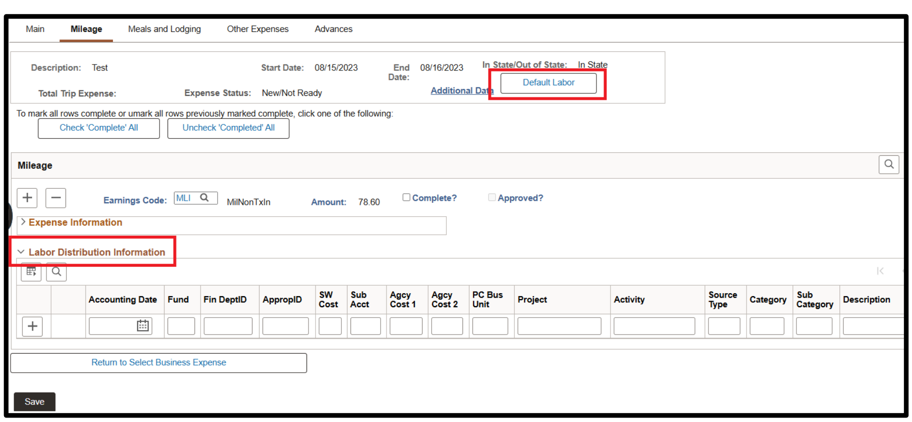
Trip Miles field, enter the number of miles traveled from city to city. The system will calculate mileage based on the IRS mileage reimbursement rate effective on the date of travel. It will display in the Nontaxable Amount field.

Local Miles field, enter the number of miles traveled locally between destinations within the city. The system **will add local miles to trip miles and calculate total** mileage based on the IRS mileage reimbursement rate effective on the date of travel. It will display in the Nontaxable Amount field.

Completing Labor Distribution

Complete labor distribution using one of the following methods:

- Default Labor
- Manual Entry
- SpeedCharts (if used by your agency)



Using Default Labor

- Select Default Labor button.
- Review the populated funding information.
- Update values if directed by your agency.

Tip: Check with your agency if you are unsure whether changes are required.

Using SpeedCharts

Some agencies use SpeedCharts to populate labor distribution information. The **SpeedChart** field and **Apply SpeedCharts** button will only display if your agency has SpeedCharts configured.

If you are unsure whether to use a SpeedChart, check with your supervisor or HR/Payroll staff.

To use a SpeedChart:

1. Enter the SpeedChart name or select the **SpeedChart Lookup** button to choose a SpeedChart.
2. Select **Apply SpeedCharts**.
3. Review the labor distribution information that is populated and make changes if needed.

Depending on the SpeedChart selected, funding may be distributed across multiple labor distribution rows.

To manually split expenses across multiple funding sources, select **Add a New Row** in the Labor Distribution section and enter the appropriate distribution amounts. The total of all labor distribution rows must equal 100% of the expense amount.

Submitting Business Expenses

- After entering all mileage expenses, review each row for accuracy.
- To mark an expense row as complete, select the **Complete?** checkbox. To mark all rows on the page as complete, select **Check Complete All**.
- While saving is not required before moving to another page, it is recommended to save your work periodically to avoid losing information if your session times out. To save your entries, select **Save**.

Important: Managers cannot approve expenses until all rows are marked Complete.

Common Mistakes to Avoid

- Forgetting to mark rows Complete.
- Labor distribution totals do not equal 100%.
- Using the wrong SpeedChart.
- Missing receipts or supporting documentation.

Settling an Advance

After travel or other business expenses have been incurred, you must settle any advance that was issued.

1. On the **Select Business Expense** page, locate the **Expense Group ID** associated with your advance request and select **Go To**.
2. Verify that the **Total Trip Expense** field displays the amount of the advance received.
3. Enter your actual expenses on the appropriate pages. You only need to complete the pages that apply to your expenses.
   - Follow the same steps used for entering business expenses details and attaching receipts, if required.

Note: Always enter settlement expenses using the same Expense Group ID that was created for the advance request.

After your expenses are submitted, agency payroll staff will process the advance recapture as part of the final approval process. Once completed, the advance will be settled and the **Total Trip Expense** field will display the actual total expenses for that Expense Group ID.

Problems and Solutions

I received an error message that a value is invalid or does not match one of the allowable values.

- The earnings code is typed incorrectly or is one that security does not allow. Be certain you made the correct selection in the In State/Out of State field. Only the earnings codes corresponding to the travel destination (in or out of the State of Minnesota) are available in the drop down box. Select the earn code **Look Up** button to look up the code**.**

It doesn't appear that my supervisor has approved my business expense entries.

- Only expense group IDs that have ALL rows marked Complete will be reviewed by managers/supervisors for approval. If there is a problem, question or documentation issue with a single row, and it has not been marked complete, you may choose to delete that row so the others can be approved, and insert the row at a later date when the issue has been resolved.

Selecting the Default Labor button does not appear to populate the labor distribution fields.

- The button will only default labor distribution values for the rows with earnings codes on the page that you are on when you select the **Default Labor** button.

I was unable to enter additional rows to an expense group that was marked complete and approved – but was not yet processed.

- You can only add an additional row to an unprocessed expense group if the earnings code on the new row does not duplicate those rows already entered and marked approved. If you have additional expenses to add to a row with an earnings code already marked complete and approved, you must change the amount on the existing row. To do so, you must first have your supervisor uncheck the **Approved?** box. Then you must uncheck the **Complete?** box in order to make the modification. After you have made the change, you will need to check the **Complete?** box again and save the row(s) before your supervisor can check the **Approved?** box. If all existing rows on an expense group have been processed, you can add additional rows with any earnings code.

There is an expense row that I did not enter, with earnings code, BTX, on a processed business expense record. How did it get there, and what is it for?

- The Internal Revenue Service (IRS) requires that if an employee does not submit expenses for reimbursement within 60 days after the expenses were paid or incurred, the reimbursement is categorized as supplemental wages, becomes taxable and withholding tax must be taken. If a reimbursement is taxable because it was not submitted within 60 days of incurring the expense, an expense row with the non-paying earn code, BTX, is added. This BTX row is created during the final agency staff approval process, and it will display on the Other Expenses page when the approval process is complete. The BTX amount is not included in the Total Trip Expense field.