

MILEAGE EXPENSE CLAIM FORM SUBMISSION GUIDE

Effective Monday, March 9, 2020, the Mileage Expense Claim Form will be migrated to an electronic submission format, and paper forms will no longer be accepted. Additionally, a revised Board Policy with regard to travel and travel expenses will be implemented with the updated form.

The updated policy is available here:
<http://www.gamutonline.net/district/whart/DisplayPolicy/957187/3>

Links to the Mileage Expense Claim Form are available on the District website under Departments/Business Services/Forms or Staff/Staff Resources.

INITIATING A NEW FORM

When initiating the form, you will need to complete your name, as the employee, and your email address prior to going in to the form:

Your full name / Su nombre completo

Your email / Su correo electrónico


Enter to receive confirmation of submission.

Go to form / Ir al formulario

Note: If you are completing this form on behalf of another employee, please enter the other employee's name and email address.

COMPLETING THE FORM

The fields that have red boxes around them are required to be completed to submit the form. If they are not completed, you will not be able to route your form for approval.



**WM. S. HART UNION HIGH SCHOOL DISTRICT
MILEAGE EXPENSE CLAIM FORM**

NAME DATE 03/02/2020

MONTH(S) start: end: WORKSITE/DEPARTMENT Select... ▼

This form shall be submitted within 60 days following the date the expense was incurred. Expenses incurred during the last quarter of the fiscal year shall be submitted no later than 10 working days after June 30th.

DATE	FROM	TO	MILES	PURPOSE
mm/dd/yyyy			number	
mm/dd/yyyy			number	
mm/dd/yyyy			number	

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- For all in-district travel, please use the Mileage Chart available on the District website under Departments/Business Services/Forms or Staff/Staff Resources.
- For all-out of district travel, please attach Google maps to your Mileage Expense Reimbursement.
- Once you have completed your form, you will need to sign the bottom of the form as the employee. Click the button that says, “Click to sign here.”

I certify the mileage listed was necessary to perform my duties as assigned and that I currently have the minimum automobile liability, bodily injury, and property insurance coverage required by California Law.

Click to sign here 03/02/2020

EMPLOYEE SIGNATURE **DATE**

For first time users, a box will pop-up, allowing you to type in your name and select a signature type. Once you complete that box, click on the “add signature” button to sign the form. For all other users, your signature may have been saved by the system.

Type your name ×

Jane Doe

Review your signature

Use Typed Draw It

Save signature for future use

By clicking 'Add signature' you accept the terms of this document and agree to Informed K12's [Terms of Use](#).
If you do not wish to sign this form electronically, [click here](#).

remove **Add signature**

Note: If you are completing the form on behalf of another employee, instead of submitting the form, click on the “Save Progress” button at the top of the page. Once you click the “Save Progress” button, an email will be sent to the other employee, at which point, they can sign the form and route it through approvals.

SUBMITTING FORM

When you click the “Submit Form/Enviar formulario” button, a pop up window will open asking you the following:

Does this form require SPED, Special Programs, or Career Technical Education (CTE) approval?

If your mileage expenses charge any categorical funds, your form must be routed to the program/department before routing to your direct supervisor for approval.

Below are the categorical departments and the resources that should be routed to them:


SPED	Special Programs	CTE
33100.0	07066.0	06350.0
33110.0	30100.0	35500.0
33270.0	30100.8	63780.0
56400.0	30100.9	63870.0
65000.0	31820.0	73700.0
65005.0	40350.0	90001.0
65120.0	41270.0	90051.0
95000.0	42010.0	90053.0
	42030.0	97200.0
	75100.0	97390.0
	90035.0	
	90050.0	

You will find this number in the “RESOURCE/PY” field on the form:

ACCOUNTING CODE					
FUND	RESOURCE/PY	GOAL	FUNCTION	OBJECT	LOCATION
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Accounting: _____ (initial/date)		Accounts Payable: _____ (initial/date)		CFO/Director of Fiscal Services/Date	

If none of these resources apply to your mileage claim, you can select the “No” button and route the form to your direct supervisor for approval. If your purchases to fit into this list, please route to the appropriate department for approval.

A review will be completed by each approval step. Should there be any issues with the submission, it will be returned to you with notes, indicating what needs to be updated. You will receive an email notification that will show the information in the body of the email:

 **InformedK12** formerly Chalk FORM NEEDS EDITS

Hi Brittany Kruczynski,

Brittany Kruczynski has requested that you make edits to your form 'Mileage Expense Claim Form' for Brittany Kruczynski - Fiscal Services - 03/02/2020 - 03/02/2020 - 01.0 - 00000.0 - 0.50 - 0.29. They marked **"Missing attachment"** as the reason edits are required.

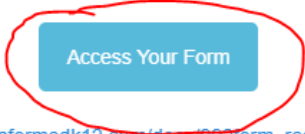
Here's a message they left when they sent back your form:

Google Map is missing for 02/05/2020 Travel Date. Please attach and resubmit. Thank you.

– Brittany Kruczynski

Additionally, if you click on the “Access Your Form” button in the body of your email, it will open your form where you can also view the notes.

For security purposes, you must sign in all relevant areas again. You can update and sign your form through the button or link below:



Link to form: https://app.informedk12.com/docs/99?form_request_id=7771237&token=8ze4ayVfEJF4Qdtu5gCRNCoG

Mileage Expense Claim Form Initiated 2 minutes ago
 Back 🕒 Form history

Currently on Step 1 of 7 (Brittany Kruczynski – bkruczynski@hartdistrict.org)
 Sent back from Step 4 to 1 on 03/02/2020 (Missing attachment)

Google Map is missing for 02/05/2020 Travel Date. Please attach and resubmit. Thank you.
 – Brittany Kruczynski

Once all approvals are completed, and your form is accepted, you will get an email indicating your form has been completed.

If you have questions on how to use this form, or you need help retrieving your form, please contact:

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cchan@hartdistrict.org

Laura Best
 Accounting Technician II
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lbest@hartdistrict.org