

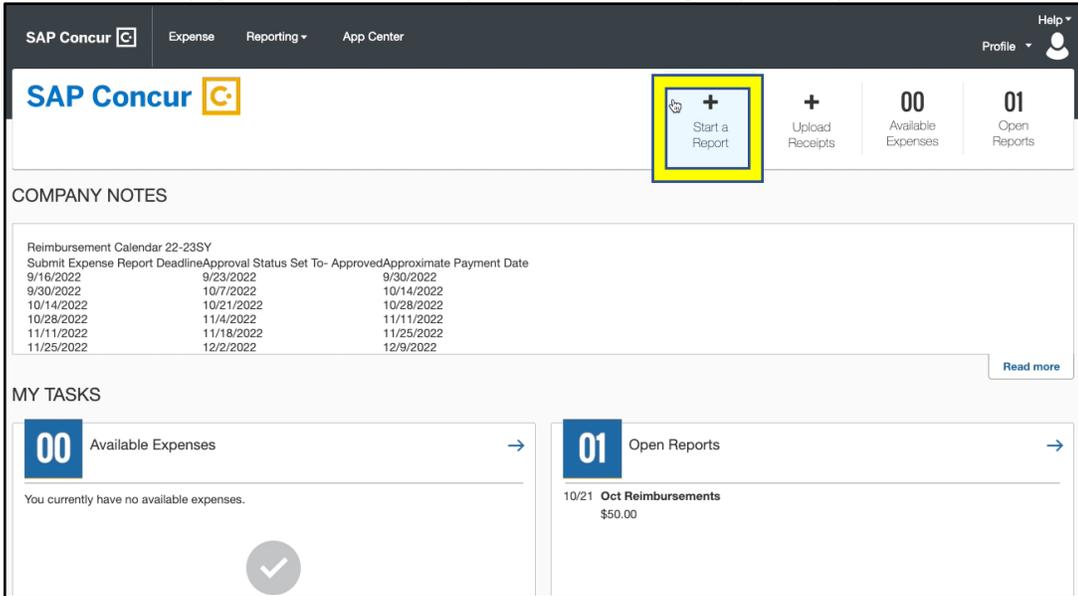
Concur - Mileage Reimbursements

(Only to be used by employees with pre-approved mileage reimbursement included in their contract)

<https://info.thesteppingstonesgroup.com/concur-training-guides-and-resources>

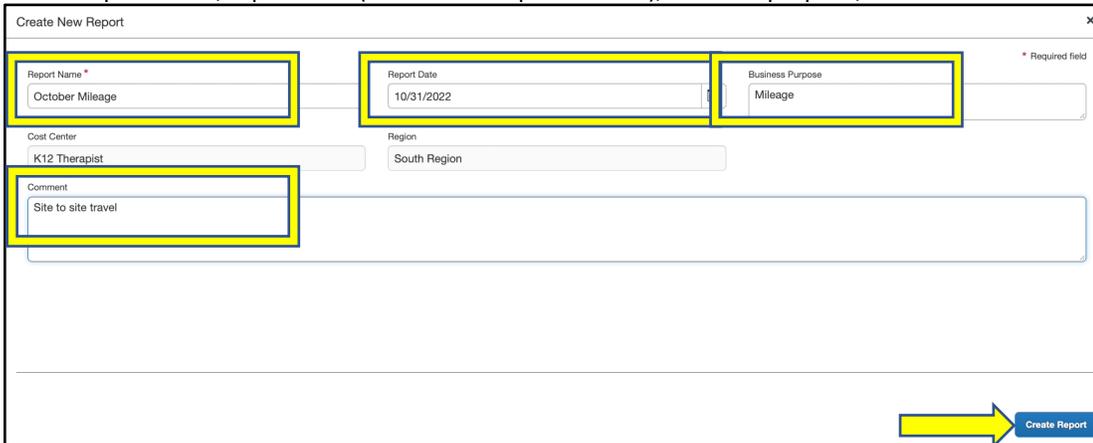
Create New Expense Report (Mileage)

On Concur Homepage, click + Start New Report to create Mileage Expense Report.



The screenshot shows the SAP Concur homepage. At the top, there are navigation tabs for 'Expense', 'Reporting', and 'App Center'. The main header area contains the SAP Concur logo and a navigation bar with four items: '+ Start a Report' (highlighted with a yellow box), '+ Upload Receipts', '00 Available Expenses', and '01 Open Reports'. Below the header is a 'COMPANY NOTES' section with a table of reimbursement calendar dates. At the bottom, there are 'MY TASKS' cards for 'Available Expenses' and 'Open Reports'.

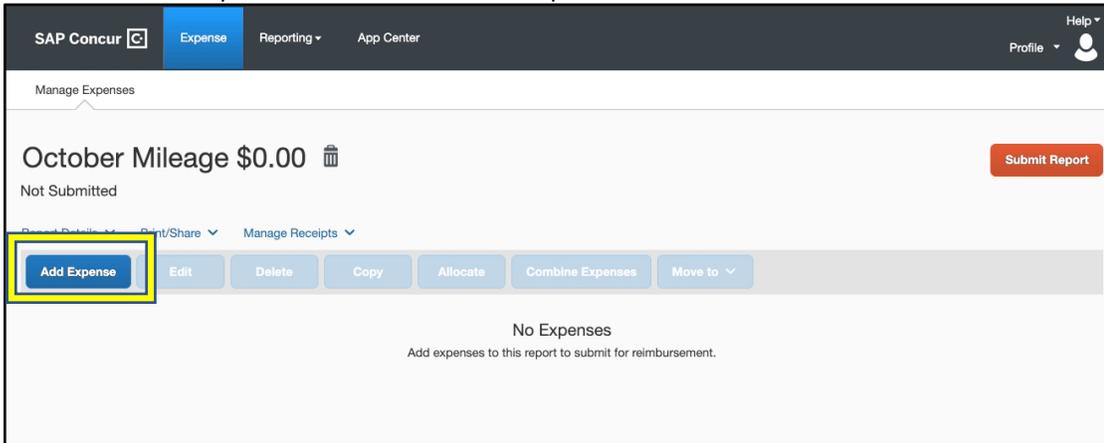
Create report name, report date (last date of expense items), business purpose, comment. Once complete, click Create Report.



The screenshot shows the 'Create New Report' form. The following fields are highlighted with yellow boxes: 'Report Name' (containing 'October Mileage'), 'Report Date' (containing '10/31/2022'), 'Business Purpose' (containing 'Mileage'), 'Cost Center' (containing 'K12 Therapist'), and 'Comment' (containing 'Site to site travel'). A yellow arrow points to the 'Create Report' button at the bottom right.

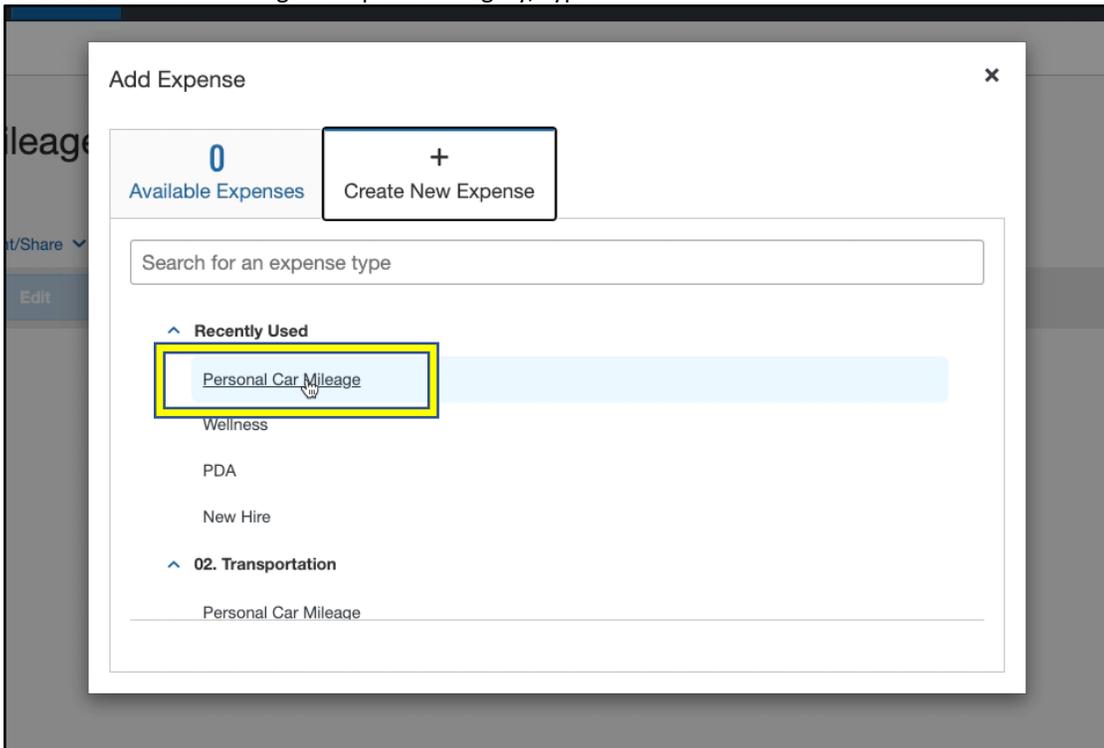
Create Mileage Expense Item(s) for Mileage Expense Report

Click on blue Add Expense button to create new expense item.



The screenshot shows the SAP Concur 'Manage Expenses' interface. At the top, there's a navigation bar with 'SAP Concur', 'Expense', 'Reporting', and 'App Center'. The main header displays 'October Mileage \$0.00' and 'Not Submitted'. A 'Submit Report' button is visible in the top right. Below the header, there's a toolbar with several buttons: 'Add Expense' (highlighted with a yellow box), 'Edit', 'Delete', 'Copy', 'Allocate', 'Combine Expenses', and 'Move to'. The main content area shows 'No Expenses' and a prompt to 'Add expenses to this report to submit for reimbursement.'

Select Personal Car Mileage as Expense Category/Type.



The screenshot shows the 'Add Expense' dialog box. At the top, it displays '0 Available Expenses' and a '+ Create New Expense' button. Below this is a search bar labeled 'Search for an expense type'. Underneath, there are two sections of expense categories. The first section is 'Recently Used', which includes 'Personal Car Mileage' (highlighted with a yellow box), 'Wellness', 'PDA', and 'New Hire'. The second section is '02. Transportation', which includes 'Personal Car Mileage'.

Complete Transaction Date and Business Purpose boxes.

The screenshot shows the 'New Expense' form with the 'Details' tab selected. The 'Transaction Date' field is highlighted with a yellow box and contains the text 'MM/DD/YYYY'. The 'Business Purpose' field is also highlighted with a yellow box and is currently empty. Other fields include 'Expense Type' (Personal Car Mileage), 'From Location', 'To Location', 'Payment Type' (Out-of-Pocket), 'Cost Center' (K12 Therapist), 'Region' (South Region), 'Distance' (0), 'Amount' (0.00), and 'Currency' (US, Dollar). Buttons for 'Save Expense', 'Save and Add Another', and 'Cancel' are at the bottom.

To complete remaining boxes (From Location & To Location, Distance, and Amount), Click Mileage Calculator.

The screenshot shows the 'New Expense' form with the 'Mileage Calculator' button highlighted with a yellow box. The 'Transaction Date' field now contains '10/17/2022' and the 'Business Purpose' field contains 'Mileage'. The 'From Location' and 'To Location' fields are still empty. The 'Amount' field now shows '0.00' and the 'Reimbursement Rates' field shows 'USD 0.625 per mile'. Buttons for 'Save Expense', 'Save and Add Another', and 'Cancel' are at the bottom.

Enter addresses for eligible site-to-site travel and click Calculate Route to calculate mileage.

The screenshot shows the 'Mileage Calculator' interface with a map of the United States. A yellow box highlights the 'Waypoints' section, which contains two addresses: '3257 Lake Shore Blvd., Jacksonville, FL' and '1201 University Blvd., Jacksonville, FL'. A blue arrow points to the 'Calculate Route' button. The map shows the route between the two locations. At the bottom, there are fields for 'TOTAL PERSONAL' (0.0 MI) and 'TOTAL BUSINESS' (0.0 MI), along with a 'Deduct Commute' checkbox. Buttons for 'Add Mileage to Expense' and 'Cancel' are at the bottom right.

Once all site addresses added for date, Click Add Mileage to Expense button (lower, right corner).

Mileage Calculator

From: 3257 Lake Shore Blvd, Jacksonville, FL
To: 1201 University Blvd N, Jacksonville, FL
Distance: 11.1 MI

Directions

Suggested routes:

- Roosevelt Blvd 11.2 mi. About 21 mins
- Cassat Ave 12.8 mi. About 24 mins

11.2 mi. About 21 mins

- Head east toward Lake Shore Blvd 131 ft
- Turn left onto Lake Shore Blvd 0.4 mi
- Turn left onto Roosevelt Ct

TOTAL PERSONAL 0.0 MI
TOTAL BUSINESS 11.1 MI

Add Mileage to Expense

From/To Location Addresses, Distance, and Reimbursement \$ should now be populated in remaining boxes. Once completed, click blue Save Expense button to add to Expense Report.

New Expense

Expense Type: Personal Car Mileage

Transaction Date: 10/17/2022

Business Purpose: Mileage

From Location: 3257 Lake Shore Blvd, Jacksonville, FL
To Location: 1201 University Blvd N, Jacksonville, FL

Payment Type: Out-of-Pocket

Cost Center: K12 Therapist

Region: South Region

Distance: 11
Amount: 6.88

Currency: US, Dollar
Reimbursement Rates: USD 0.625 per mile

Save Expense

View of Mileage Expense attached to Mileage Report

Manage Expenses

October Mileage \$6.88

Not Submitted

Report Details | Print/Share | Manage Receipts

Receipt	Payment Type	Expense Type	Vendor Details	Date	Amount	Requested
<input type="checkbox"/>	Out-of-Pocket	Personal Car Mileage		10/17/2022	\$6.88	\$6.88
					\$6.88	\$6.88

Adding Multiple Expense Items to Expense Report, Select All Expense Items, Submit for Approval

Click Add Expense button to create additional mileage expense items for same Expense Report and Repeat New Expense Item steps as above. (When adding additional expense items, make sure correct Expense Type/Category selected for each—Example: Personal Car Mileage for Mileage Expense Items)

Manage Expenses

October Mileage \$6.88

Not Submitted

Report Details Print/Share Manage Receipts

Add Expense

<input type="checkbox"/>	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ☰	Amount ↑↓	Requested ↑↓
<input type="checkbox"/>		Out-of-Pocket	Personal Car Mileage		10/17/2022	\$6.88	\$6.88
						\$6.88	\$6.88

Once all expense items created, click the select all box to highlight all expense items and click Submit Report for Finance to Review/Approve for reimbursement.

Manage Expenses

October Mileage \$20.64

Not Submitted

Report Details Print/Share Manage Receipts

Add Expense

<input type="checkbox"/>	Receipt ↑↓	Payment Type ↑↓	Expense Type ↑↓	Vendor Details ↑↓	Date ☰	Amount ↑↓	Requested ↑↓
<input checked="" type="checkbox"/>		Out-of-Pocket	Personal Car Mileage		10/21/2022	\$6.88	\$6.88
<input checked="" type="checkbox"/>		Out-of-Pocket	Personal Car Mileage		10/19/2022	\$6.88	\$6.88
<input checked="" type="checkbox"/>		Out-of-Pocket	Personal Car Mileage		10/17/2022	\$6.88	\$6.88
						\$20.64	\$20.64

Expense Report Status Change Email Notifications (Examples)

Expense Report Submitted and Awaiting Finance Review for Approval

Email Confirmation of SUBMITTED Expense Report:

From: AutoNotification@concursolutions.com <AutoNotification@concursolutions.com>
Sent: Friday, October 7, 2022 9:31 AM
Subject: Expense Report Status Change

SAP Concur  

Expense Report Status Change

Your expense report listed below has changed status.

Changed By	[REDACTED]
Report Name	[REDACTED]
Report Date	10/05/2022
Submit Date	10/07/2022
Amount Approved	[REDACTED] USD
Approval Status Set To	Approved
Payment Status Set To	Not Paid

[View Report](#)

Expense Report Approved by Finance & Payment Deposit in Approximately 5-7 Days from this Email Notification

Email Confirmation of APPROVED Expense Report:

From: AutoNotification@concursolutions.com <AutoNotification@concursolutions.com>
Sent: Monday, October 10, 2022 10:40 AM
Subject: Expense Report Status Change

SAP Concur  

Expense Report Status Change

Your expense report listed below has changed status.

Changed By	Concur System
Report Name	[REDACTED]
Report Date	10/05/2022
Submit Date	10/07/2022
Amount Approved	[REDACTED] USD
Approval Status Set To	Approved
Payment Status Set To	Paid

[View Report](#)

Processing payment only; deposit will be made into your account within 5-7 business days

Projected Payment/Deposit Date Email Notification (Expense Pay Notification)

Email Confirmation of Expense Report PAID:

From: AutoNotification@concur solutions.com <AutoNotification@concur solutions.com>

Subject: Expense Pay Notification



Expense Pay has arranged payment for your expense claim

Report Name: [Redacted]
 Report ID: 1DFBBC9193F7451AAA6C

Projected Payment Date: October 17, 2022

Link To Concur Expense:
<http://www.concursolutions.com>

2022-2023 SY Reimbursement Calendar



THE STEPPING STONES GROUP
 Transforming Lives Together

Reimbursements 22-23 SY Calendar

Submit Expense Report Deadline	Approval Status Set To- Approved	Approximate Payment Date
9/16/2022	9/23/2022	9/30/2022
9/30/2022	10/7/2022	10/14/2022
10/14/2022	10/21/2022	10/28/2022
10/28/2022	11/4/2022	11/11/2022
11/11/2022	11/18/2022	11/25/2022
11/25/2022	12/2/2022	12/9/2022
12/9/2022	12/16/2022	12/23/2022
12/23/2022	12/30/2022	1/6/2023
1/6/2023	1/13/2023	1/20/2023
1/20/2023	1/27/2023	2/3/2023
2/3/2023	2/10/2023	2/17/2023
2/17/2023	2/24/2023	3/3/2023
3/3/2023	3/10/2023	3/17/2023
3/17/2023	3/24/2023	3/31/2023
3/31/2023	4/7/2023	4/14/2023
4/14/2023	4/21/2023	4/28/2023
4/28/2023	5/5/2023	5/12/2023
5/12/2023	5/19/2023	5/26/2023
5/26/2023	6/2/2023	6/9/2023
6/9/2023	6/16/2023	6/23/2023
6/23/2023	6/30/2023	7/7/2023

Additional questions? Please email SSG's Reimbursement Team at finance.reimbursements@ssg-healthcare.com for further assistance.