



Munis Self Service Entering Expense Reimbursements

A screenshot of the "Welcome to Employee Self Service" dashboard. The page has a dark header with the Tyler Technologies logo. Below the header, there are three main sections: "Announcements", "Personal information" (with a "View profile" button), and "Paychecks" (with a "Show paycheck amounts" button). On the right side, there is a vertical navigation menu with options: "Home", "Employee Self Service" (highlighted), "Certifications", "Expense Reports" (circled in red), "Pay/Tax Information", and "Personal Information". The "Paychecks" section shows a table of "Previous paychecks" with columns for date, amount, and "Details" link. The first entry is for 3/27/2015, and the second is for 3/13/2015. A "Tools" link is also visible.

1. You will be redirected to Home screen. If you have forgotten your password, please contact the Help Desk @ 4295.
2. Select Employee Self Service menu option on the right side of the page.
3. Select Expense Reports from the expanded menu.

A screenshot of the "Expense reports" page. The page has a dark header with the Tyler Technologies logo on the left and the user name "PATTY, PEPPERMINT" on the right. Below the header, there is a "Expense reports" section with a sub-header "Expense reports" and a button "Add a new claim" (circled in red). Below the button, it says "No expense claims were found." On the right side, there is a vertical navigation menu with options: "Home", "Employee Self Service", "Certifications", and "Expense Reports" (highlighted).

1. Select "Add a new claim" from the Expense Reports detail line.

Select the claim type for your new claim from the drop down. The claim type chosen will provide unique screens.

- **Conference – ESTIMATED** - All Conferences must have approval 30 days prior to the event. The approval is based on an estimated claim amount. The estimate should include fees, travel and lodging expenses, per diems, and any other known amounts. Within the Claim Type dropdown, select Conference – ESTIMATED.

Select the department that is authorizing the charge.

Type in a description for the event in the text field provided.

The Start and End date should include dates of travel if outside of the actual event dates. The dates can either be typed in or a calendar is available by clicking inside the date fields.

Click Continue.

Expenses and receipts

Unsaved claim [Edit details](#)

Claim type	Conference
Department	PAYROLL
Description	Tyler Conference - Atlanta
Event	
Start date	Saturday, May 2, 2015
End date	Wednesday, May 6, 2015
Cash advance	\$0.00
Total amount claimed	\$0.00

Location

Per diem expenses \$0.00

Unit expenses \$0.00

Informational expenses

Attach documentation

[Review](#) [Save For Later](#) [Cancel](#)

The event location, City and State are required fields. Click on the  on the Location menu to expand the section.

Location

Destination city*

Destination state*

Type the city and state in the appropriate box.

***** At this stage, the claim is unsaved. If you wish save as you go, Click "Save For Later" at the bottom of the page. A confirmation with your new claim number will appear at the top of the page once the save is complete.**



You will need to go back to the Expense reports screen and click "Details" and Update to add more information.

The system will populate the per diem amounts for each day included in the conference date range. Click the  on the Per Diem Expenses menu to expand the section.

Per diem expenses				\$30.00
	<input type="checkbox"/> Breakfast \$6.00	<input type="checkbox"/> Lunch \$9.00	<input type="checkbox"/> Supper \$15.00	Total
Saturday, May 2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Sunday, May 3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$15.00
Monday, May 4	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Tuesday, May 5	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$15.00
Wednesday, May 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	\$0.00	\$0.00	\$60.00	

Place a check in the box for any meals that were not provided for during the event.

Click the  Unit Expenses Menu to expand the section. The "Add an Expense" is on the right side.

Unit expenses
\$0.00

[Add an expense](#)

There are currently no unit expenses for this claim.

There are several expense types available within Unit Expenses. A pop-up will appear with a drop down of types to choose from. *If there is a specific Account String for an expense, enter the string on the comment line.*

Expense information

Expense type: Air Fare/luggag

1 @ \$0.000 Total = \$0.00

Date incurred:

Comments:

Expense information

Expense type: Lodging

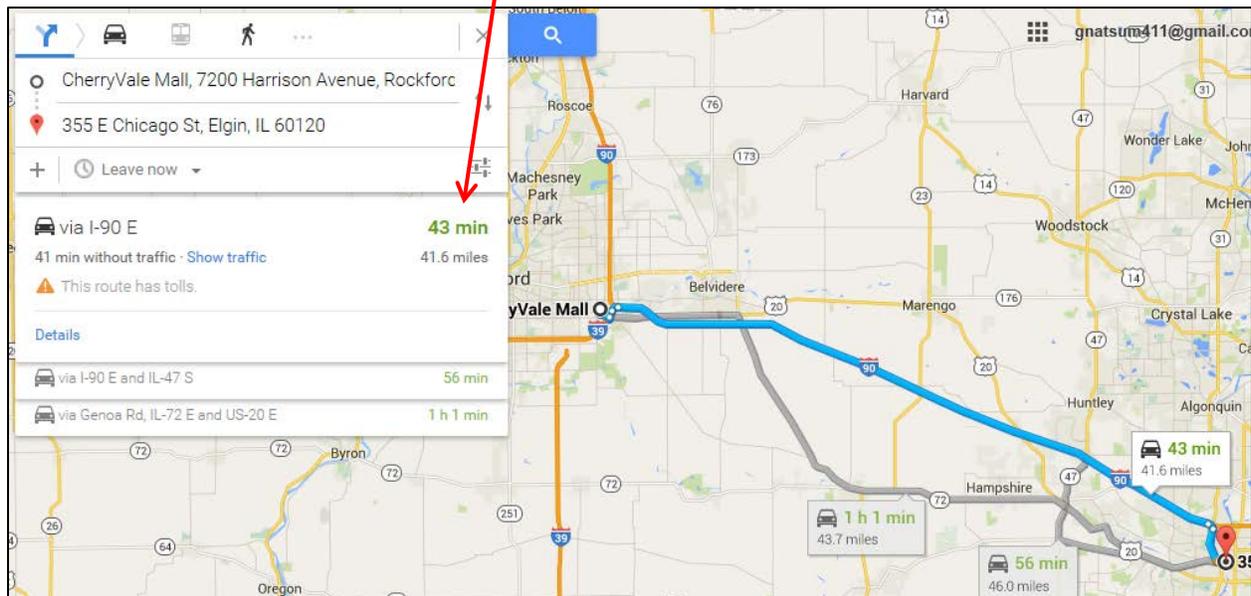
5 @ \$199.99 Nights = \$999.95

Date incurred:

Comments:

Continue clicking the “Add an Expense” until all amounts are accounted for. Mileage that occurred outside of the district requires a Google map or other map that would include the total miles traveled. The mileage does not need to appear on two lines as long as the attachment verifies the total mileage.

Unit expenses				\$1,181.60
Expense	Comments	Date	Amount	Add an expense
Lodging	10-5110-000000-1110-0000-012-012	5/2/2015	\$999.95	update delete
Parking Fees		5/2/2015	\$100.00	update delete
Mile out dist	Elgin to Rockford and back	5/2/2015	\$81.65	update delete



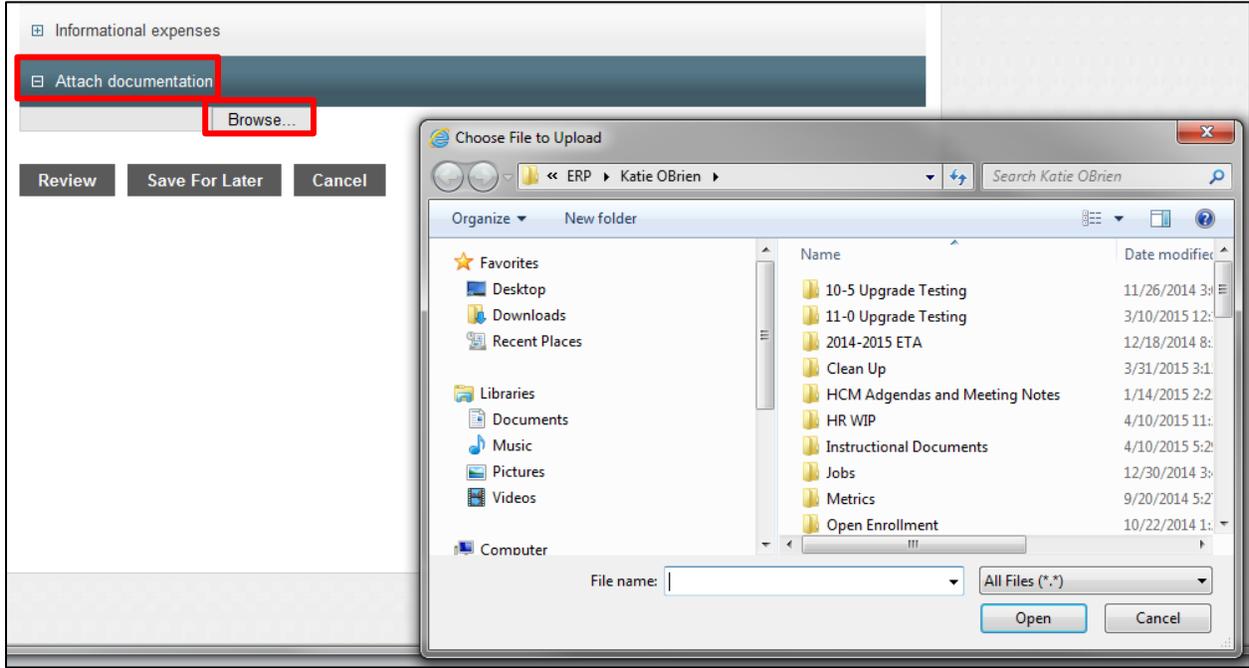
If there are additional expenses that did not have a specific template available they can be entered under the Informational Expenses menu. Please be as specific as possible in the comment section provided.

Expense information

Expense type i

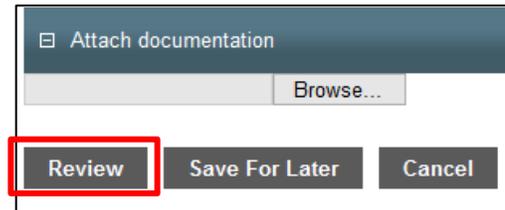
Comment

All expense items must have a receipt. They are attached to the claim under the menu “Attach Documentation”. When the section is expanded, a browse button will be visible. Self Service requires that the receipt is saved to a file and then attached to the claim. You cannot scan an image directly to the claim.



Once all expenses are documented, click Review at the bottom of the page.

If you have not saved this claim yet, you will need to Save for Later before you can review.



Self Service will load all the fields entered to be verified.



Verify all amounts look correct and check the box at the bottom of the page to agree to the terms.

Amount claimed	\$1,256.60			
Per diem expenses				
	Breakfast	Lunch	Supper	Total
Saturday, May 2			15.000	15.000
Sunday, May 3			15.000	15.000
Monday, May 4			15.000	15.000
Tuesday, May 5			15.000	15.000
Wednesday, May 6			15.000	15.000
				\$75.00
Cash advances	0.00	0.00	0.00	\$0.00
Per unit expenses				
	Date	Comments	Cash advance	Amount claimed
Lodging	5/2/2015	10-5110-000000-1110-0000-012-012	0.00	999.95
Parking Fees	5/2/2015		0.00	100.00
Mile out dist	5/2/2015	Elgin to Rockford and back	0.00	81.65
			\$0.00	\$1,181.60
Attached documents				
test time file.csv				
I acknowledge the accuracy of the expenses submitted and that this claim has not been previously submitted for reimbursement.				
<input type="checkbox"/> I have read and agree to the terms above.				
Submit Claim				

<https://msi.train/employees/Expenses/AddClaim.aspx?edit=yes>

Submit your claim.

The system will provide a Confirmation at the top of the page along with your claim number.



The claim is now in created status and has now been delivered to payroll to have the account strings applied.

The employee cannot update fields on the claim unless it is rejected for some reason. If it is rejected, an email will be sent to the email address on file.

Expense reports

[Add a new claim](#)

Date	Description	Id	Status	Total	
5/2/2015 - 5/6/2015	Tyler Conference - Atlanta	8964	Created	\$1,256.60	details delete copy

Once Payroll has completed their updates, the expense will be released to the Assistant Superintendent for approval. You can see this on self service.

The screenshot shows the Tyler Technologies self-service portal. The user is logged in as 'PATTY, PEPPERMINT'. The 'Expense reports' section displays a table with one entry: 'Tyler Conference - Atlanta' with ID 8964 and status 'Released'. A sidebar menu on the right includes 'Home', 'Employee Self Service', 'Certifications', and 'Expense Reports' (which is highlighted).

Date	Description	Id	Status	Total	
5/2/2015 - 5/6/2015	Tyler Conference - Atlanta	8964	Released	\$1,256.60	details delete copy

The example provided is for a conference. All conference are an estimate prior to actual trip. Once the cabinet member has approved the trip the status on self service will change to Approved.

Expense reports

[Add a new claim](#)

Date	Description	Id	Status	Total	
5/2/2015 - 5/6/2015	Tyler Conference - Atlanta	8964	Approved	\$1,256.60	details delete copy

Once the estimate is approved, the claim can now be updated with actual amounts that need to be reimbursed. To go back into the claim, select details on the main Expense Reports menu. Click the Update button on the bottom of the page.

Attached documents

test time file

[Update](#)