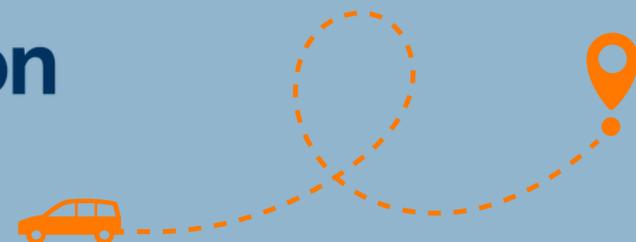# *Blanket Travel Expense Report Guide*

A step by step guide with screenshots

CSUF | **COLLEGE OF Education**

Blanket Travel Expense Report Guide

Before you start

NOTE

You will need to have an Approved blanket travel request before you can move forward with submitting a blanket travel expense report

NOTE

- Blanket Travel Expense Reports are due **once** a month
- The report will be from the first day to the last day of the month
- The report needs to be submitted by the 15th of the **following** month
- **All** trips that occurred within one month should all be on the same report
- **All** trips that occurred within on day should all be inputted on the same expense line/map

QUESTIONS?

If you have any questions, please first contact your department coordinator. If additional assistance is needed, email coetravel@fullerton.edu or attend open office hours listed on the COE Travel website

Create a Blanket Travel Expense Report

STEP 1

Click Home, then Click "Request"

Create a Blanket Travel Expense Report

STEP 1

Find the tile of your approved blanket travel request for the current fiscal year. Make sure the tile is green and notes "Approved" as shown here. You will use the same blanket travel request for the whole academic year. Once located, click into the request.

NOTE

If you do not see your blanket travel request for the current fiscal year here as a tile, change the "Active Requests" to "All Requests" and you will see all requests as a list. Select from there.

Manage Requests

Home / Requests / Manage Requests

Manage Requests

Request Library

View [Active Requests ∨] [⊕ Create New Request]

Blanket Travel FY 2024-2025
11/07/2024 | 4L
$100.50
[Approved]

Blanket Travel FY 2024-2025
05/17/2024 | 4LH7
[Not Submitted]

Blanket Travel FY 2024-2025 ⚠
07/01/2024 | 4L
$100.50
[Returned]

Sent Back to User

NOTE

If you see that your blanket travel request is blue and notes "Not Submitted", you will need to go into the request and click submit until you receive a confirmation.

NOTE

If you see that your blanket travel request is red and notes "Sent back to User", revisions may be needed and you will need to resubmit your request for approval.

Blanket Travel Expense Report Guide

Create a Blanket Travel Expense Report

STEP 2

Once you are in your Approved Blanket Travel Request, click on "Create Expense Report"

Manage Requests

Home / Requests / Manage Requests / Blanket Travel FY 2024-2025

⚠ Alerts: 1

Blanket Travel FY 2024-2025 $100.50

More Actions ⌄   **Create Expense Report**

Approved | Request ID: 4MRW

Request Details ⌄   Print/Share ⌄   Attachments ⌄

REPORTS: 2

Amount	Remaining
$49.58	$100.50

EXPECTED EXPENSES

Expense type↓↑	Details↓↑	Date↓=	Amount↓↑	Requested↓↑
Mileage	Fullerton, California	07/01/2024	$100.50	$100.50
				$100.50

Blanket Travel Expense Report Guide
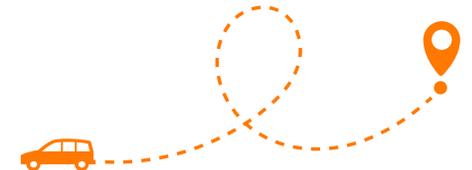
Blanket Travel Expense Report

NOTE

The page that will open up is an expense report. From here, you will need up update the report information first

SAP Concur Expense ⌄

Manage Expenses   Card Transactions

Blanket Travel FY 2024-2025 $0.00

Delete Report   Submit Report

Not Submitted | **Report Number: WVAGXD**

REQUEST
Approved
$98.25

STEP 1
Click Report Details

Report Details ⌄   Print/Share ⌄   Manage Receipts ⌄   Travel Allowance ⌄

View Available Receipts 🗒

Report
Report Header
Report Totals
Report Timeline
Audit Trail
Linked Add-ons
Manage Requests

dit   Delete   Copy   Allocate   Combine Expenses   Move to ⌄

STEP 2
Click Report Header

Blanket Travel Expense Report Guide

Update Blanket Travel Expense Header Information

Report Header   ✕

Blanket Travel FY 2023-2024 | $0.00

❌ Alerts: 2   ⌄

* Required field

Policy *
State Blanket Travel

STEP 1
Click State Blanket Travel

STEP 2
Enter Blanket Travel (Month) (Year)

NOTE
Report Date is the date that you created the report. Leave as is

Blanket Travel Month/Year * ⓘ
Blanket Travel JUL 2024

Report Date
07/26/2024

Month Start Date *
07/01/2024

STEP 3
Enter Month Start & Month End

Month End Date *
07/31/2024

Trip Type
In-State

STEP 4
Click In-State

Report/Trip Purpose *
Blanket Travel (Mileage and Parking)

STEP 5
Click Blanket Travel (Mileage and Parking)

Event Name/Business Purpose   51/64
Supervision of Teachers OR Travel to _____ for _____

STEP 6
Enter "Supervision of teachers" OR "Travel to _____ for _____"

☑ Mailing Address Current? * ⓘ

STEP 7
Check Mailing Address is current

Were Registration Fees incurred or paid by the University? * ⓘ
No

STEP 8
Select No

Divison *   1
(10237) VP Academic Affairs -NP   ✕ ⌄

Department ID *   2
(10100) Elem/Bilingual Education   ✕ ⌄

Fund *
(THEFD) THEFD:CSU Operating Fund   ✕ ⌄

Class

Programs
(5629) Mileage Reimbursement   ✕ ⌄

NOTE
Should be prefilled

STEP 9
Enter (THEFD) THEFD:CSUF Operating Fund

Comment   28/500
Various cities in California

STEP 10
Enter 5629 Mileage Reimbursement

NOTE
Leave as is or add any comments you would like

Cancel   **Save**

STEP 11
Click Save

Blanket Travel Expense – Add Expense Line
Personal Car Mileage Expense

STEP 1
Click Add Expense

STEP 2
Click New Expense

STEP 3
Click Personal Car Mileage

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Blanket Travel Expense – Adding Destinations

STEP 1
Enter your starting Point A

STEP 2
Enter the location you went to in Point B

NOTE
Enter your starting point from the shorter distance (Home or CSUF) to your destination

NOTE
Enter all trips for one day. If you only went to one school site, there will only be point A, B, and C

Mileage Calculator

☐ Avoid Tolls   ☐ Avoid Highways

Waypoints

A | 800 N State College Blvd, Fullerton, | ✕
B | 811 W Lincoln Ave, Anaheim, CA 928 | ✕
C | 500 Bradford Ave, Placentia, CA 928 | ✕
D | 400 Pierre Rd, Walnut, CA 91789, US | ✕
E | 800 N State College Blvd, Fullerton, | ✕
F | [blank] |

6.1 MI ☐ Personal
7.3 MI ☐ Personal
13.2 MI ☐ Personal
12.9 MI ☐ Personal

Calculate Route

STEP 3
Click Calculate Route

NOTE
Click **Make Round Trip,** to return to point A

| TOTAL PERSONAL | TOTAL BUSINESS |
| 0.0 MI | 39.5 MI |

Add Mileage to Expense   Cancel

STEP 4
Click on Add Mileage to Expense

Blanket Travel Expense Report Guide

Blanket Travel Expense - Adding Expected Expense

SAP Concur   Expense ⌄

Manage Expenses   Card Transactions

Home / Expense / Manage Expenses / Blanket Travel FY 2024-2025 / New Expense

New Expense

Cancel   **Save Expense**

Show Receipt

Details   Itemizations

👤 Mileage Calculator * | 🎟 Allocate

NOTE
Personal Car Mileage should be prefilled

STEP 1
Enter Transaction Date (date you traveled)

STEP 2
Enter Departure Time

* Required field

Expense Type * ⓘ
Personal Car Mileage

Transaction Date *
07/15/2024

Departure Time * ⓘ
10AM

STEP 3
Enter Return Time

Return Time * ⓘ
5PM

STEP 4
Enter Type of Work Day

Type of Work Day * ⓘ
Supervision of Teachers

Report/Trip Purpose *
Blanket Travel (Mileage and Parking) ⌄

Purpose of the Trip * ⓘ
Supervise Student Teacher

From Location
800 N State College Blvd, Fullerton, CA ...

To Location
400 Pierre Rd, Walnut, CA 91789, USA

Payment Type ⓘ
Cash/Personal Credit Card

STEP 5
Enter Blanket Travel (Milage and Parking)

Request ID

STEP 6
Enter Purpose of the Trip

NOTE
Distance will be automatically calculated

Distance *
40

Amount ⓘ
26.80

Currency
US, Dollar (USD)

Reimbursement Rates
USD 0.67 per mile
Request *
06/30/2023, $98.25 - Blanket Travel ... ⌄

Comment ⓘ
Anaheim HS-student name
Valencia HS- student name
Walnut HS -student name

STEP 7
Enter details of the trips. Include the locations and all students you visited

74/500

STEP 8
Click Save Expense

Save Expense   Save and Add Another   Cancel

NOTE
- If you made multiple trips throughout the month, add it to the same Report
- Repeat steps on Page 8-10 until all trips in a month have been inputted
- Only one report per month.
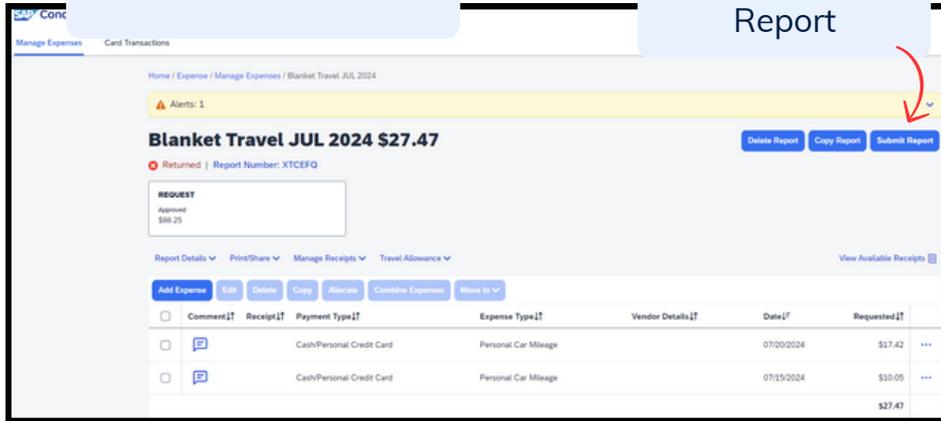
Submitting Blanket Travel Expense

NOTE

- After you finish inputting **all** your trips for the month, **then** complete the following steps

STEP 1

Click Submit Report

STEP 2

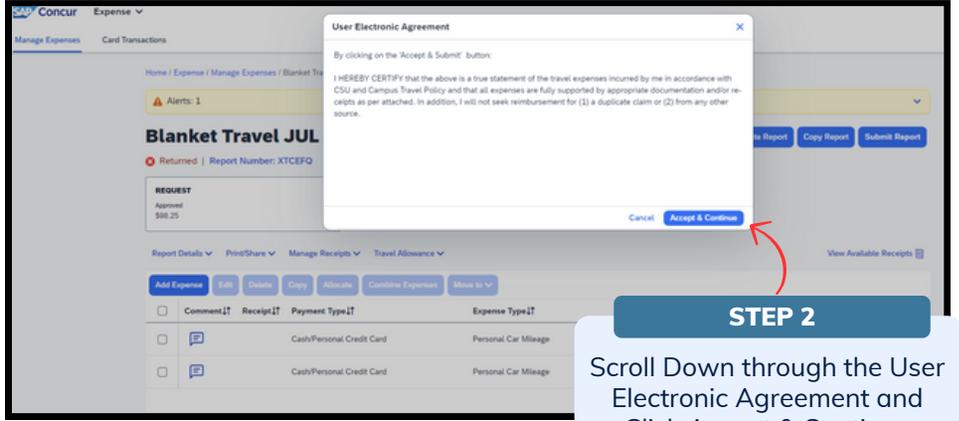Scroll Down through the User Electronic Agreement and Click Accept & Continue

STEP 3

Click Submit Report

STEP 4

Make sure to get this confirmation page, then Click Close

End of the Blanket
Travel Expense
Report Guide