



# FRONTLINE PROCEDURES

Pasadena ISD

**ENTRY POINT:**  
Create Expense Report

REVISED DATE: 07/30/2023

**SUBJECT: Creating a Zero Dollar Expense Report**

**Entry Point: Create Expense Report**

- Enter the name of the person who submitted the Travel Request
- Click **Continue**

Here you will see the Expense Report

- **Highlight** the Report
- Click **Edit**
- Enter the **Departure/ Return Date and Time**
- Click **Continue**



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**ENTRY POINT:**  
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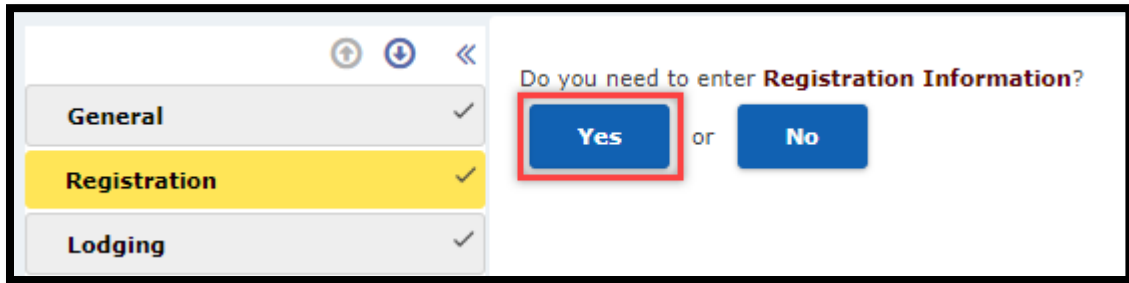
REVISED DATE: 07/30/2023

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Each person's expense report will vary, so you'll have to modify the tabs that are marked with a check.

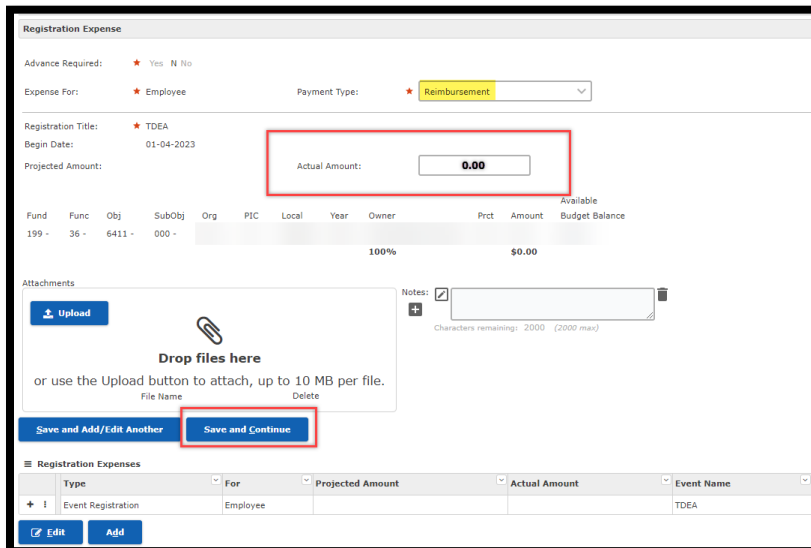
This is an example...  
It will ask you if you need to enter information

- Click **Yes**



In this example, the Registration tab will open up.

- **Payment Type:** use the drop down to select **REIMBURSEMENT**
- **Actual Amount:** enter zero 0.00
- Click **Save and Continue**





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Move down to the next tab with the check mark

- Click **Yes**

Do you need to enter **Rental Car or Personal Mileage Information?**

**Yes** or **No**

General ✓  
Registration ✓  
Lodging ✓  
**Vehicle** ✓

In this example, the Vehicle tab will open up.

- **Payment Type:** use the drop down to select **REIMBURSEMENT**
- **Actual Mileage:** enter zero miles, doing this will change the **Actual Amount** to zero
- Click **Save and Continue**

Vehicle Expense

Advance Required: \* Yes N No

Expense For: \* Employee Payment Type: \* Reimbursement

Vehicle Type: \* Personal

Projected Mileage: (round up to nearest mile) 16

Actual Mileage: (round up to nearest mile) 0

Actual Amount: 0

Projected Amount: 10.0

Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	Pct	Amount	Available Budget Balance
199	36	6411	000						100%	\$0.00	

Attachments

Drop files here

or use the Upload button to attach, up to 10 MB per file.

Save and Add/Edit Another Save and Continue

Type	For	Projected Amount	Actual Amount	Vehicle Type
Vehicle	Employee	10.0	10.48	Personal



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Move down to the next tab with the check mark

- Click **Yes**

Do you need to enter **Meal Information?**

**Yes** or **No**

General ✓  
Registration ✓  
Lodging ✓  
Vehicle ✓  
Airline  
Meals ✓

In this example, the Meals tab will open up.

- **Payment Type:** use the drop-down to select **REIMBURSEMENT**
- **Number of Employees:** 1
- Click **Continue**

Meals Expense

Advance Required: ★ Yes N No

Expense For: ★ Employee Payment Type: ★ Reimbursement

Number of Employees: ★ 1

**Continue**

Meals Expenses

Type	For	Projected Amount	Actual Amount
Meals	Employee	243.0	81.0

**Edit** **Add**



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This opens up the page to select either **District Paid** or **Provided**

- Click **PROVIDED** for all meals by doing this it will change the **Actual Amount** to zero
- Click **Save and Continue**

**Meals Expense**

Advance Required:  Yes  No

Expense For:  Employee      Payment Type:  Reimbursement

Number of Employees:  1

Date	Day of Week	Meal	District Paid	Provided	Per Diem	Projected	Actual
01-04-2023	Wednesday	Breakfast	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	0.00	0.00
		Lunch	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	36.00	0.00
		Dinner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	45.00	0.00
01-05-2023	Thursday	Breakfast	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	27.00	0.00
		Lunch	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	0.00	0.00
		Dinner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	45.00	0.00
01-06-2023	Friday	Breakfast	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	27.00	0.00
		Lunch	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	36.00	0.00
		Dinner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	0.00	0.00
01-07-2023	Saturday	Breakfast	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	27.00	0.00
		Lunch	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	0.00	0.00
		Dinner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	0.00	0.00
<b>Totals:</b>					Max Reimbursement 0.00	Actual 0.00	Reimbursement 0.00

Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	Prct	Amount	Available Budget Balance
199	-	36	-	6411	-	000	-		100%	\$0.00	

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Notes:  Characters remaining: 2000 (2000 max)



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- Click on the **Submit/Summary** Tab

This will display all of the expenses that have been entered.

The **Payment Type** should be **REIMBURSEMENT**

The **Actual Amount** should be **0.00**

Review it

- Click **Submit**

Expense Type	Expense Description	Payment Type	Expense For	Proj Amt	Actl Amt
Lodging	Marriot Marquis Houston	Reimbursement	Employee	597.00	0.00
Vehicle	Personal	Reimbursement	Employee	10.00	0.00
Meals		Reimbursement	Employee	243.00	0.00
Other	Parking - Hotel	Reimbursement	Employee	135.00	0.00
Event Registration	TDEA	Reimbursement	Employee		0.00

Projected Total: 985.00  
Actual Total: 0.00

Request ID	Event	City	Status	Next in Workf
1311	Traveling to TDEA Convention with an All State student.	HOUSTON	Entered	

**Submit**