

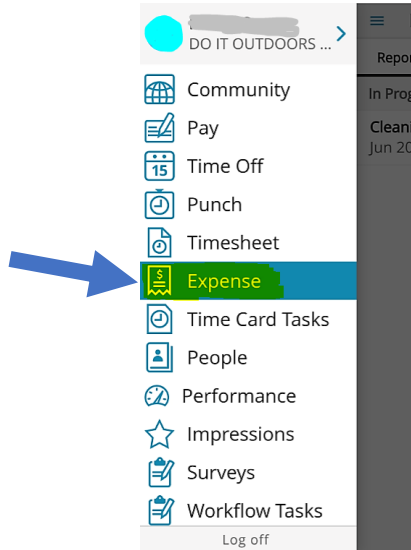


# Paylocity Employee Self Service

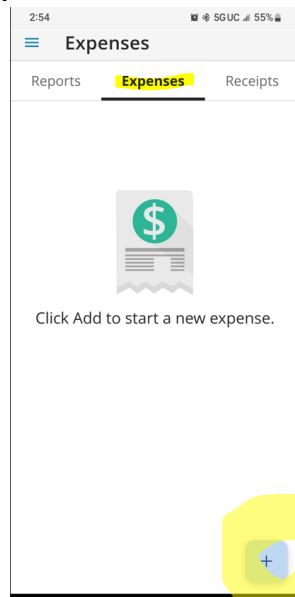
## Expense Reporting

Sign into Paylocity app

1. Click on Expense

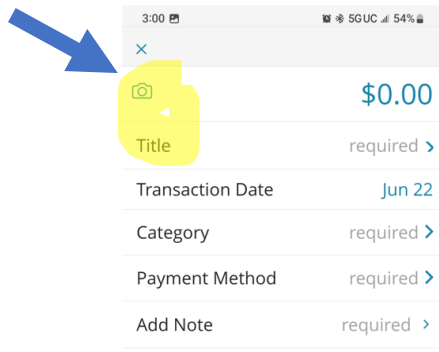


2. Click < Expenses >

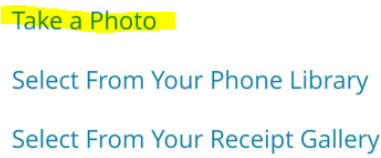


3. Click < + > to add a new expense / receipt

4. Click the camera icon 



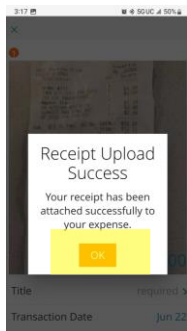
5. The following pop up will appear, Click “Take a Photo”



Your camera will open, take a photo of your receipt, getting as close and clear as possible. Hit < [Submit](#) >

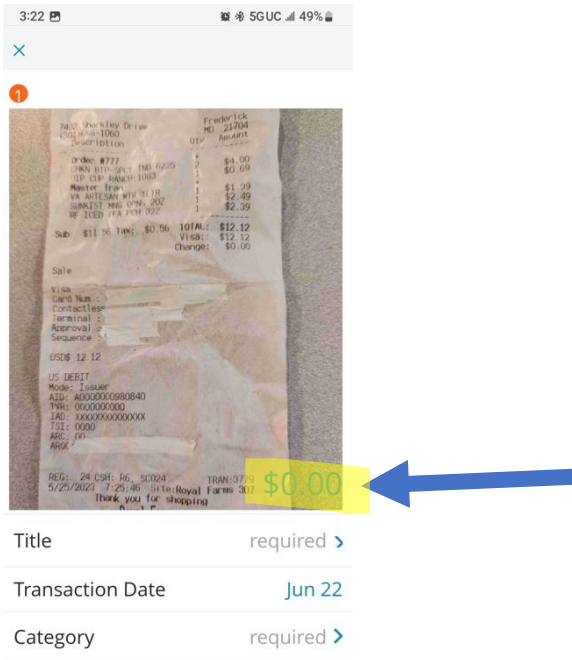


You will receive notification of “Receipt Upload Success”

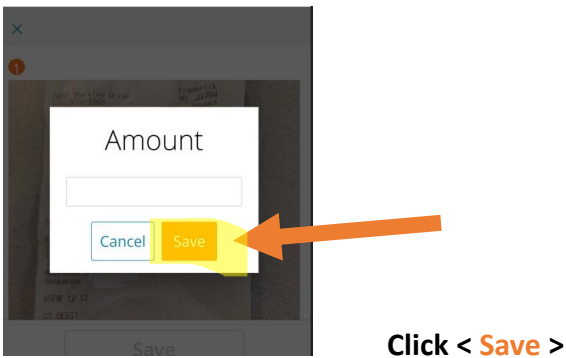


Click < [OK](#) >

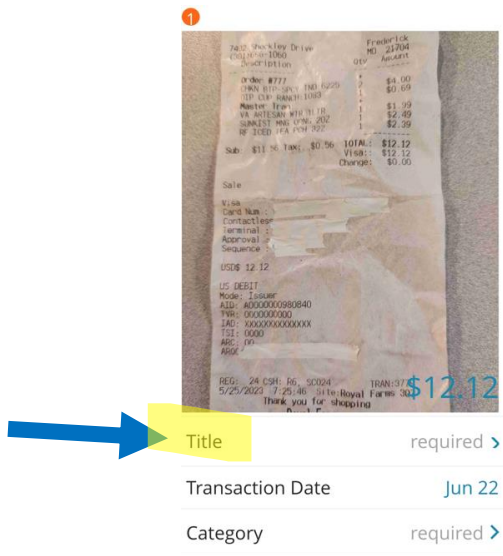
Click the < \$0.00 > in the image



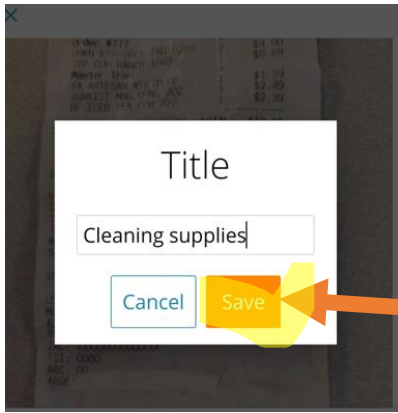
Enter the amount of the receipt in the pop up window



Click < Title >



Enter the reason for the expense in pop up as follows:



Click < Save >

Click < Transaction Date >

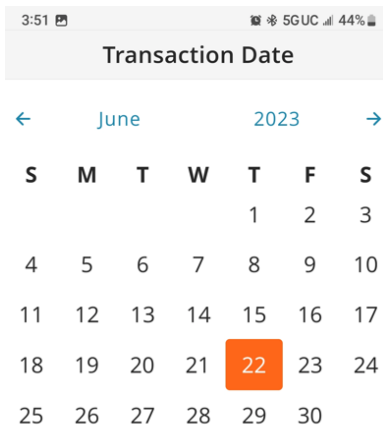
(This will auto fill with the date that you create the expense and photograph receipt)



Title	Cleaning supplies
Transaction Date	Jun 22
Category	required >

+

On the calendar pop up, select the date from the receipt.



Click < Category >



Title	Cleaning supplies
Transaction Date	May 25
Category	required >
Payment Method	required >
Add Note	required >



Click **Expense** –ALWAYS click Expense in the pop up

3:52 5GUC 44%

Select Category

Search

None

Expense



Click < Payment Method >



Title	Cleaning supplies
Transaction Date	May 25
Category	Expense
Payment Method	required >
Add Note	required >



Click < Cash (reimbursable) > – ALWAYS Cash (reimbursable)

3:59 5GUC 42%

Select Payment Method

Search

None

Cash (reimbursable)

Cash (reimbursable)

Cash (reimbursable)

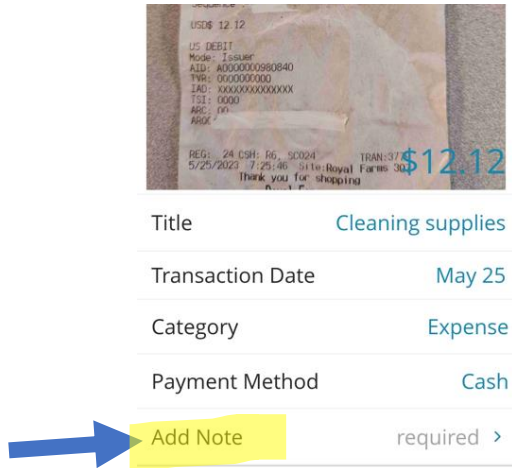
Credit Card (non-reimbursable)

Credit Card (non-reimbursable)

Credit Card (non-reimbursable)

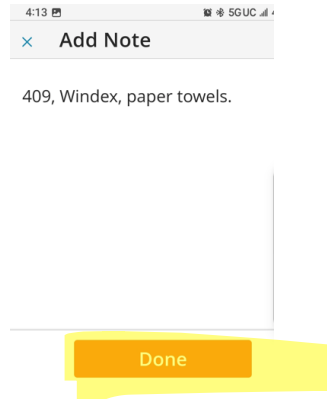
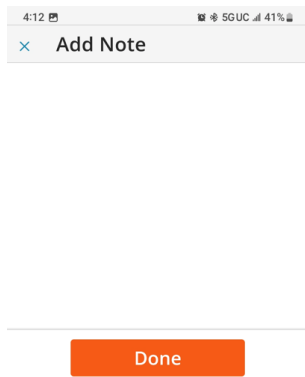


Click < Add Note >



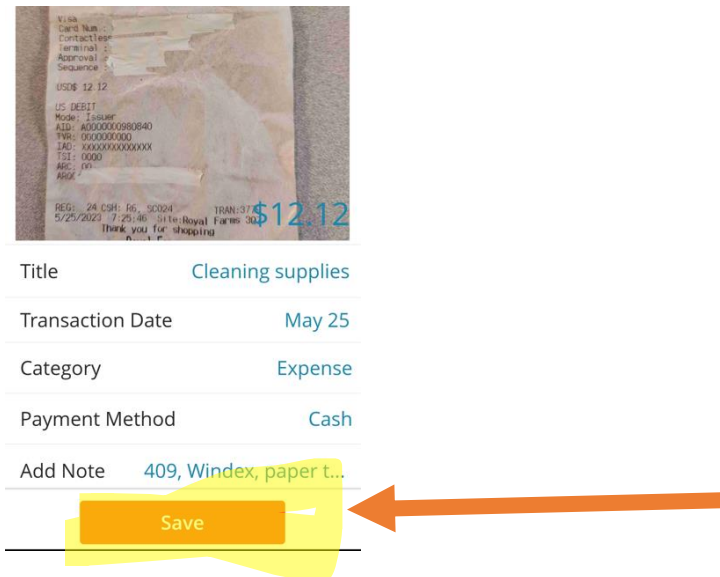
Enter the details of the transaction

(below are screen shots of blank screen and then sample of items purchased in transaction)

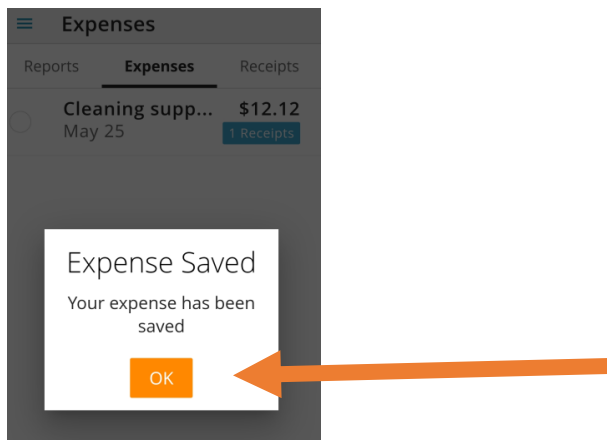


Click < Done >

Click < Save >



You will get pop up stating “Expense Saved” - Hit < OK >



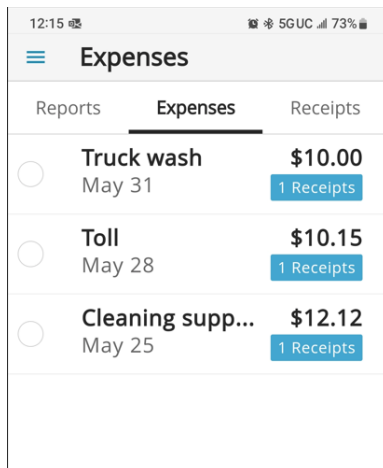
**Congratulations! You have finished creating your first expense**

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You can add expenses as you make purchases and continue to save.

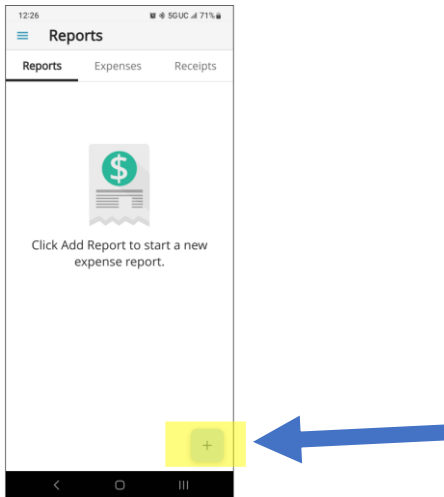
Submit when due: the Sunday before payday.

As you create & save expenses, they will appear as follows in chronological order.

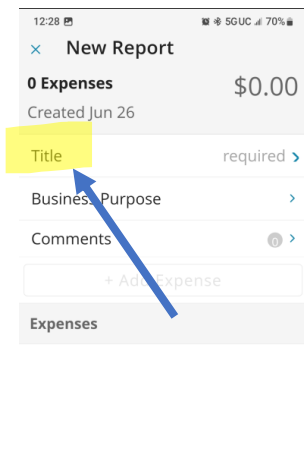


Now that you have your expenses created, it's time to create a "Report" to submit them for reimbursement.

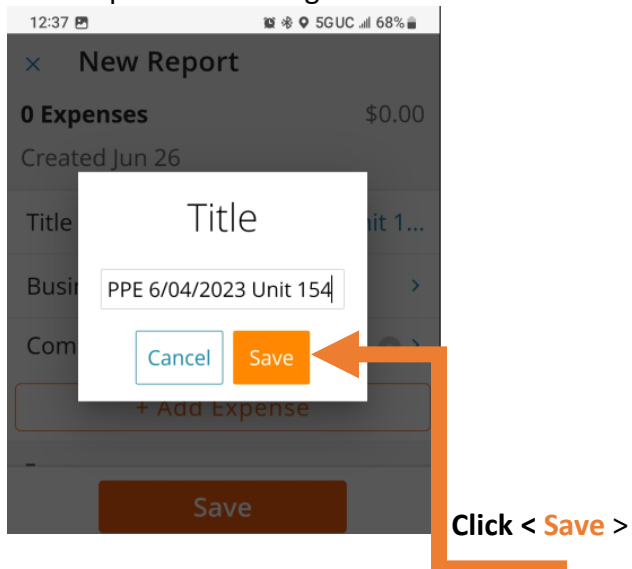
From the Reports tab, click < + >



Next view, Click Title

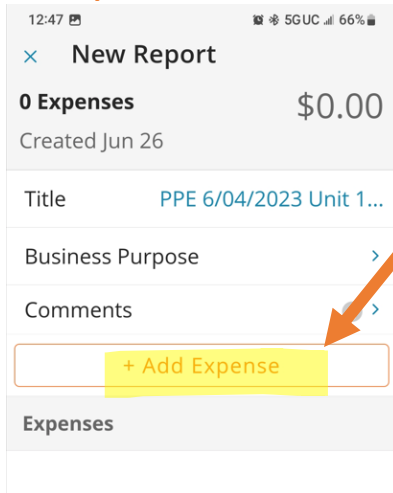


Enter Title: PPE (Pay Period Ending) + UNIT #  
(For this example we are using PPE 6.014.2023 Unit 154 )

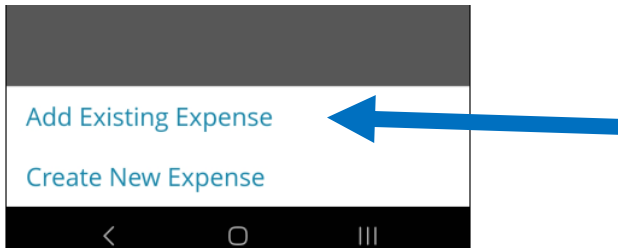




Click **< Add Expense >**



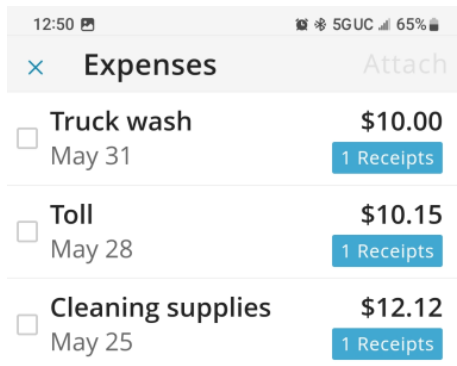
The following Pop Up appears:



Since the expenses have been created and saved in the app, we are going to

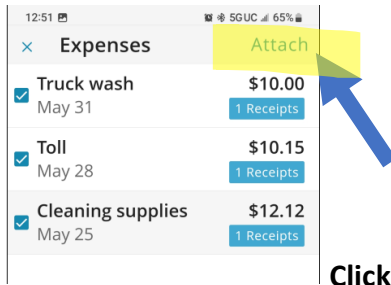
**< Add Existing Expense >**

Created expenses will appear as shown:



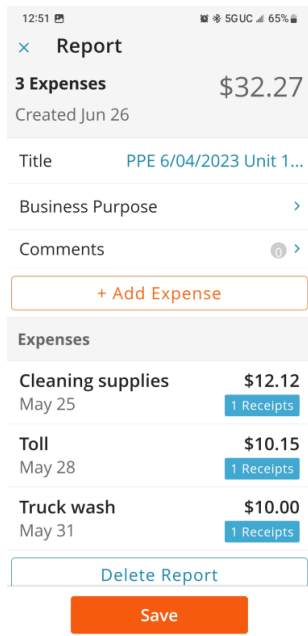
Click the expenses you want to add to report for submittal.

Selected expenses will be marked with blue check box.



Click < **Attach** >

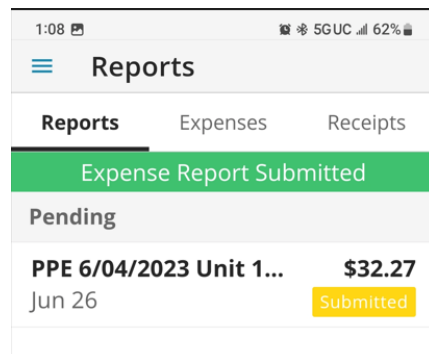
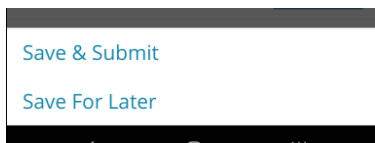
Expenses will populate to your report as shown below:



Click < **Save** >

The Pop Up below appears, here you have 2 options, you may

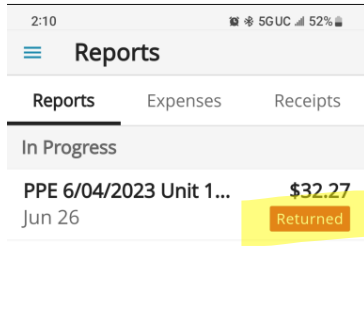
1. **Save & Submit** report for review/approval by Tim Piester & payment **or**
2. **Save for Later** this would allow you to add additional expenses > BE SURE to submit by due date



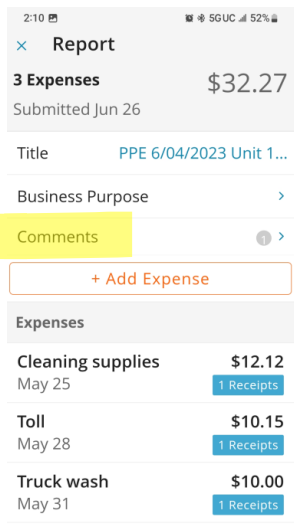
Once submitted

Once Tim approves, you will receive a push notification from Paylocity stating “Expense Report Returned”

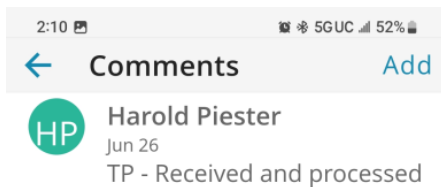
When you go into Paylocity App > Expenses > Reports you will see report noted In Progress as **RETURNED**



If you click on the report, you will see Comments



Click on Comments to see that Report has been received and processed for payment



**Important note:**

Do not delete reports from Paylocity App until reimbursement appears on your paycheck