

Florida Teacher Classroom Supply Assistance Program Funds – Receipt Submission

Prepare receipts using the following guidelines prior to submission:

- Sign and date all receipts.
- All receipts must be detailed. If the receipt items ring up with a generic code or if it is a food item, write the items on the receipt. All food items require an explanation on how the item will be used in the classroom.
- Receipts can be scanned and saved to your computer as one of the following file types: PDF, JPG, DOCX. Multiple receipts may be combined and uploaded into Employee Self Service as one document.
- Documents can be scanned directly to email by using the school copier. The document(s) attached to the email (not the email itself) must be saved to your computer as PDF document(s) for importing into the Expense Reports module of Employee Self Service.

Complete the following steps to submit a claim:

1. Using Safari, Firefox or Internet Explorer, go to the District home page: www.pasco.k12.fl.us. Click on **Employee Self-Service** under the **Pages** section of **Helpful Links** navigate to myPascoConnect: <https://launchpad.classlink.com/dsbpc>.
2. Log in to Employee Self Service. Your **User name** is the first part of your District email address (i.e. tjones). Your password is your previously established myPascoConnect or Employee Self Service password. If you have not created a password or have forgotten your password, please go to: <https://mss.pasco.k12.fl.us/ESS> for instructions. For assistance with password issues, please email munishelp@pasco.k12.fl.us.
3. Click on **Employee Self-Service** – the **Welcome to Employee Self Service page opens**
4. Click on **Expense Reports**

The screenshot shows the 'Welcome to Employee Self Service' page. On the right side, there is a vertical navigation menu with the following items: Employee Self Service, Benefits, Certifications, Expense Reports (circled in green), Pay/Tax Information, Personal Information, Substitute Teaching, Time Off, and Employment Opportunities. The main content area on the left includes sections for Announcements, Personal information (with a 'View profile' link), and Time off.

5. Click on **Add claim**.

The screenshot shows the 'Expense reports' page. It features a table with the following data:

| Date | Description | Id | Status | Total |
|-----------|--------------------|-------|------------|---------|
| 3/18/2016 | Classroom Supplies | 12426 | Reimbursed | \$65.49 |

Below the table, there is a button labeled 'Add claim' which is circled in green. The right-hand navigation menu is also visible, with 'Expense Reports' and 'Add claim' highlighted.

6. Fill in the following in the following fields (marked with an asterisk)
 - a. **Claim type:** Defaults to Teacher Lead Program Receipts
 - b. **Department:** Select your school's name using the drop-down arrow
 - c. **Description:** Enter the type of items purchased
 - d. **Start date:** The date you are entering your claim
 - e. **Start time:** Do not change
 - f. **End date:** The date you are entering your claim
 - g. **End time:** Do not change

7. Click "Continue"

| | | |
|-------------------------------|---|--|
| Claim type | Teacher Lead Program Receipts | Employee Self Service Benefits Certifications Expense Reports Add claim Pay/Tax Information Personal Information Substitute Teaching Time Off |
| Department* | James Irvin Ed Ctr Adult Ed | |
| Description* | Classroom Supplies for Team A | |
| Start date* | 12/6/2016 | |
| Start time | 00:00 <small>NOTE: Use HH:MM format. For example, use '08:30' for 8:30 am, '17:00' for 5 pm.</small> | |
| End date* | 12/6/2016 | |
| End time | 00:00 <small>NOTE: Use HH:MM format. For example, use '08:30' for 8:30 am, '17:00' for 5 pm.</small> | |
| Continue Cancel | | |

8. Click on **Unit expenses**, then click on **Add an expense**

| | |
|--|--------|
| Cash advance | \$0.00 |
| Total amount claimed | \$0.00 |
| Location | |
| Unit expenses | \$0.00 |
| Add an expense | |
| There are currently no unit expenses for this claim. | |

9. Complete the following fields within **Expense information** (repeat this step if you have multiple receipts)

- a. **Expense type:** Defaults to Teacher Receipts
- b. **Amount:** Enter 1 @ (total amount of eligible items purchased)
- c. **Date incurred:** Date of purchase
- d. **Comments:** Enter the name of location where you purchased the item(s)
- e. Click On **Save expense**

Edit details

Expense information

Expense type: TeacherReceipts ⓘ

1 @ \$ 10.000 each = \$10.00

Date incurred: 12/6/2016

Comments: Walmart (SAMPLE)

Save expense **Cancel**

10. Upload receipts

- a. Click on **Attach supporting documents**, then click on **Choose File**
- b. Select the scanned receipt and click **Open**
- c. After upload, the document name will appear under **Attach supporting documents**
- d. **NOTE:** An **acceptable receipt** for upload must meet the following requirements:
 - i. The **ENTIRE RECEIPT** including the vendor name, receipt date, receipt total **must** be visible – **handwritten receipts are not acceptable**
 - ii. A phone picture is valid for receipt images, but **ALL CAPTURED IMAGES MUST BE LEGIBLE TO BE ACCEPTED – claims will be rejected** if the image is backward, blurry, or otherwise illegible

| Expense | Comments | Date | Amount |
|--|------------------|-----------|---|
| TeacherReceipts | WALMART (SAMPLE) | 12/6/2016 | \$10.00 update delete |
| <input type="button" value="Attach supporting documents"/> | | | |
| <input type="button" value="Choose File"/> No file chosen | | | |

11. To submit the claim, complete the following steps; otherwise, skip to **Step 12: Save for Later**

- a. Click **Review**
- b. Verify that the information is accurate, then click **Submit Claim**

Verify Expenses

Claim details

| | |
|----------------|-------------------------------|
| Comments | Classroom Supplies for Team A |
| Claim type | Teacher Lead Program Receipts |
| Status | Entering |
| Department | James Irvin Ed Ctr Adult Ed |
| Start date | Tuesday, December 6, 2016 |
| End date | Tuesday, December 6, 2016 |
| Amount claimed | \$10.00 |

Per unit expenses

| | Date | Comments | Cash advance | Amount claimed |
|-----------------|-----------|------------------|--------------|----------------|
| TeacherReceipts | 12/6/2016 | WALMART (SAMPLE) | 0 | 10.00 |
| | | | \$0.00 | \$10.00 |

Attached documents

There are no documents attached to this claim.

- c. A **Confirmation** and claim number is generated upon successful submission



- d. The claim is listed on the **Expense Reports** summary page with a status of **Created**

Expense reports

[Add a new claim](#)

| Date | Description | Id | Status | Total |
|-----------|-------------------------------|-------|---------|------------------------------|
| 12/6/2016 | Classroom Supplies for Team A | 27412 | Created | \$10.00 copy |

12. **Save For Later** (Skip this step if you have already submitted your receipts)
 - a. Click **Save for Later** to continue/complete the claim at a later date
 - b. The claim is saved with the status of **Entering**
 - c. To submit a claim in the **Entering** status, complete the following steps
 - i. On the **Expense Reports** summary page, click the **Id** number

| Expense reports | | | | |
|---------------------------------|-------------|-------|----------|-----------------------------|
| Add a new claim | | | | |
| Date | Description | Id | Status | Total |
| 12/6/2016 | TEST | 27413 | Entering | \$5.00 copy |

- ii. Click **Update**, which is located at the bottom of the screen
- iii. Complete steps 7 – 9 above to **Add an expense** to add additional receipts, and/or **Attach supporting documents** to upload additional receipts
- iv. Complete step 11 above to **Submit claim** for processing

To exit Employee Self Service:

1. Click on your name in the upper right corner and select **Log Out**
2. To ensure account security, close all browser windows after exiting Employee Self-Service

Status Definitions:

- **Entering:** The claim has been entered, but has not been submitted for review. **Save for Later** was selected at the time of entry so the claim is visible, but it cannot be processed. Claims with **Entering** status will not be counted as a valid submission until steps have been taken to transition claim to a **Created** status.
- **Created:** The claim has been submitted, but has not been reviewed.
- **Released:** The claim has been reviewed and is awaiting approval.
- **Rejected:** The claim has been denied. **These are not ALL the reasons for a possible rejection, but they are the most common:**
 - an ineligible purchase was made (i.e. printer, computer, shredder, laminator, gift cards, fees for license renewal or conference registration, food for parties/meetings, etc.)
 - there is no receipt attached to the claim
 - the attached receipt is not legible or cannot be opened for review
 - the purchase was made prior to 7/1/2016
 - the claim is a duplicate of another claim already submitted by the same employee
 - the claim is a duplicate of another claim already submitted by another employee
 - the claim amount is for more than the total on the attached receipt
- **Approved:** The claim has been accepted and will count toward the total funds provided to the teacher.
- **Reimbursed/Closed:** Approved claims are moved to Reimbursed/Closed status so the Finance department can close the month's activity.

| Expense reports | | | | |
|---------------------------------|-------------------------------|-------|------------|------------------------------|
| Add a new claim | | | | |
| Date | Description | Id | Status | Total |
| 12/6/2016 | TEST | 27413 | Entering | \$5.00 copy |
| 12/6/2016 | Classroom Supplies for Team A | 27412 | Created | \$10.00 copy |
| 3/18/2016 | Classroom Supplies | 12426 | Reimbursed | \$65.49 |