Cheat Sheet for Travel reporting in Egenrapportering

Contents

Reporting Status in ER

Reported	The report has been created and saved in Egenrapportering
Granted	The report is granted by appointed authorized person
Examined	The report is reviewed by an appointed reviewer and ready for approval
Approved	The report is approved by the manager in charge
Transferred	The report is transferred to payroll system to calculate salary
Not approved	The report has been rejected by the approver
For investigation	The report is under investigation by the approver
Saved preliminary	The report is saved but not sent for authorization

Travel

When you have a mission you should write travel claim in ER in order to have your expenses for travel, subsistence etc calculated and paid together with your next salary.

In ER Travel reports you can:

- Seek out your own previous travel cases

- Register a new travel case

- Change the data in a travel case, which can be done as long as the matter is in status **Reported**

- Cancel a travel case, which can be done as long as the matter is in status **Reported**

- View your payment for any travel case. This is possible after the matter has reached the status **Transferred**. It is then approved by the manager and calculated.

- Make a supplement to a travel case, which is already with outlays.

- Make an addition regarding outlays to a travel case which is transferred.

It is <u>not</u> possible to:

Make a change in a travel case when it is sent to reviewers, calculated or when the travel case is cancelled.

The following tabs are used for reporting travel expenses at MIUN

Travel: departure and return, meal deduction, travel by private car and night subsistence

Abroad: countries when traveling abroad

Coding: accounting
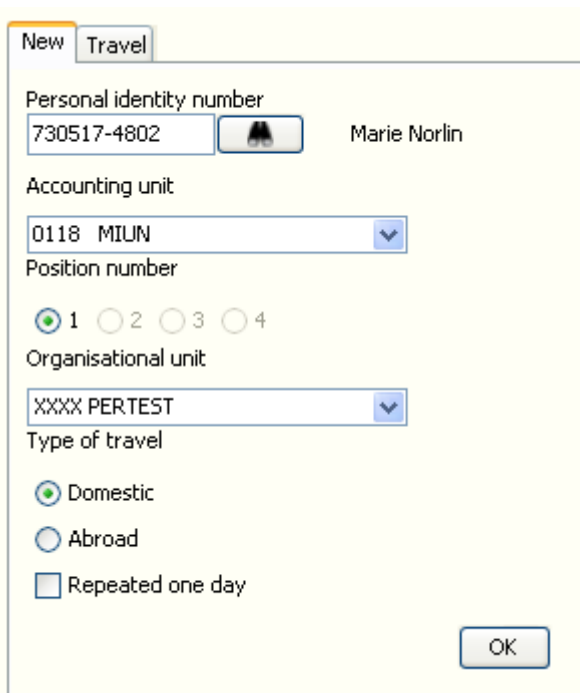
No allowance: no allowance or wage supplements

Expense: expenses in association with the mission which are to be replaced by the employer

CO2: reporting carbon dioxide emission

Note: notes

Reporting new travel case

Click on **Travel** on the left side menu. The name of the tab is **New** where you select **Domestic** or **Abroad**. When you click on **OK** a new travel matter is created.

Travel

Fill out the fields **Departure Fr o m** (date of departure), **At** (time of departure), **Destination** (the place of business), Return trip **Until** (date of return), **At** (time of return) and **Purpose**

Destination and **purpose** are underline mandatory information. If it is a trip abroad you must also state the country.

Zone (Travel Area)

- **Outside the place of business**

- **In the place of business** which means within 5 mil/50 kilometer radius from work-place or home

- **No subsistence and allowances**, no subsistence an allowances but it is possible to reg-ister compensation for use of own car.

Move issue to – If there is another organizational unit that will pay for the trip you choose to move your case to that organizational unit. This applies even if the trip is supposed to be paid by another org. unit within the institution.

Click on **Save** and the remaining fields for reporting will open.

Meals

Here you present the meals you have got during the mission.

Breakfast is marked automatically if you have been away more than one day. If breakfast is a part of the hotel rate you shall mark breakfast.

Meals in service are considered in most cases as a benefit for example: a conference, business meetings, planning days, department meetings and project meetings. It is irrelevant whether the employer or someone else offers the meal.

You benefit is taxed and it made a meal deduction of the subsistence allowance during the mission.
Exception benefit taxation is:

- When food is included in the fare on public transport and you cannot deselect.

- Free breakfasts, where it is repuired in the cost of overnight accommodation.

- For internal/external representation – see more info abourt this in Miun´s website Medarbetare/stöd/Personalfrågor/Tjänsteresor

 If you haven't got any meals at all, but instead paid for them yourself, click in the alternative **No meals.**

No meals						
Date	Breakfast	Lunch as benefit	Lunch	Dinner as benefit	Dinner	Private housing
2011-10-03	☐	☐	☐	☐	☐	

Private housing

Mark **Private housing** for current date if you for instance have stayed the night with friends or relatives. Unmark **Breakfast** for the current date.

Car compensation

If you have used your own car on the mission you are entitled to mileage.

- Select by **Contract** the type of mileage you are entitled to.
  For missions by car the employer pays tax-free allowance with 18, 50 SEK /mil *enl KL* **Taxfree ALFA** (tax free + the general salary and benefit agreement).

- In addition, when it's a domestic mission and the car is the most suitable transport, there is a salary supplement of 13 SEK/mil **Tax free + local agreement**.

- Fill out **No in km** by private car. Save.

Car compensation

State	Contract	Date	No of km	
⊕	Taxfree + local agreement ▾	2011-09-21 📅		

Coding

In the list box, under Name, you'll find your department's assignments for travel from which you can choose. Select the appropriate title.

Administrate codings -Your payroll administrator can register additional accounts.

Define **Share** = 100% if there is only one account to charge. Specify in **Share %** if the trip is to be distributed to several accounts. The total extent is always 100 %

You can also create and connect one time coding.

All travel must be charged to an account!

No allowance

State	Event	From	At	From meal	Until
➕	No compensation ▾	2011-10-03 📅			📅

No compensation - if no compensation shall be paid for certain days during your trip for example if you traveled in connection with holidays or if you don't want allowance, subsistence and wage supplements, for your trip but only expenses to be replaced.

Enter **From** (starting date) and **Until** (ending date).

Expense

If you have had expenses in connection to the trip for example a hotel bill, you should enter this under **Expense**. You should also attach all your original receipts to support the travel bill.

State	Type of salary	Denomination	Number	Currency	Course	Price pe...	VAT	Amount	Verif	Country	Coding	Corr	Remark
➕													T

By selecting a row and you can write a note regarding the outlay in the box **Note**, which will be seen below.

- Select in **Type of salary** the cost you want compensation for.
- Enter amount. Report the amount **including** VAT. The VAT amount, which will be calculated automatically, must be specified on the receipt. The calculated VAT amount can be changed.

CO2 (carbon dioxide), Climat impact

Status	Means of conveyance	Fuel	Date	From	To	No of km	Kg CO2

Reporting the carbon dioxide emission regarding travel expenses (e.g taxi) and mileage

- Select type of **Means of conveyance**, **Fuel**, **From** (place of departure) and **To** and **No of km**
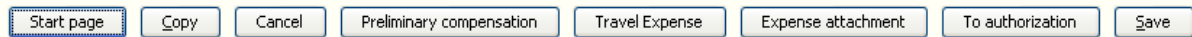
The field **Kg CO2** (carbon dioxide emission in kg) is calculated by a table from "Naturvårdsverket" (Environmental Protection Agency). There is a destination table with the bigger airports to choose from. If you select one of those the field **No of km** will be filled out automatically.

Note

Note	Date	At	User

Here you can make a note, for example about a missing account or other necessary information about regarding the travel case. Information about the date the note was done, the time and the user will be saved.

Buttons

| Start page | Copy | Cancel | Preliminary compensation | Travel Expense | Expense attachment | To authorization | Save |

Start page - You get back to the tab **New**. You will get a question if the travel case shall be sent for approval. If you answer **No** the case will be saved. You can continue reporting later by selecting the tab **Travel** and then select the travel case.

Copy - This function can be used if you want to copy the same type of travel case.

Cancel - If you want to cancel a travel case which can only be done if the travel case is in status

Preliminary compensations- Here you can see the preliminary compensation based upon the information you have reported.

Travel expense- On your travel specification you can see everything that will form the basis for payment

Expense attachment- Here you can see your expenses that you have reported under the tab **Expense**.

To authorization- To click on when all tabs are completed.

When you have reported everything click on **Specification travel expense** to get a travel specification of your travel case. Here you can see the accounting, purpose, date, mileage and the total amount. **If it looks ok, click on the button To authorization/calculation**

In order to pay out the travel expenses following documents requires:

- **programs, invitation, agenda or message, where the purpose and date shown.**
- **All receipts, which have been reported, in the original. Staple these to expense attachment.**

Abroad

After a trip abroad you select **Abroad** under the tab **New** and then **OK.** The travel case is to be reported the same way as an inrikes (domestic) under the tab Resa.

Select the tab **Abroad**

Palasso gets the given data to the tab **Abroad**

Enter the date and time when you left Sweden.

Select Country. Enter when you arrive to the country in Arriving on date and Local time and also when you leave the country.

Enter the date and time when you arrive back to Sweden.

Never report the time you spend in the air or by boat but only when you arrived to the country and how long you have stayed there. From these data the allowance will be calculated according to the rules for traveling abroad.

Travel cases

Under the tab **Travel** you can see all your travel cases, which status they have, who have approved them (**Responsible for the authorization**) and when it is approved (**Date of authorization**).

New | Travel

All travels for Marie Norlin, 730517-4802

Departure	Return trip	Purpose (max 150 characters)	Destination	Travel ID	Status	Tot amount	Responsible for th...	Date of authoriza...
2010-12-06	2010-12-06	Förmiddag: Riksrevisionen, eftermiddag: ...	Östersund	119595	Transferred	150,00	Niklas Bergman	2010-12-13
2010-11-02	2010-11-03	HR-dagar, Logica	Stockholm	119157	Transferred	456,00	Niklas Bergman	2010-11-18
2010-10-26	2010-10-27	Arbete med nya webben.	Östersund	119127	Transferred	519,00	Niklas Bergman	2010-11-18
2010-10-19	2010-10-19	Östersund		118623	Transferred	150,00	Niklas Bergman	2010-10-27
2010-05-17	2010-05-18	Stockholm Nacka. Acceptansmöte version...		117436	Transferred	511,00	Niklas Bergman	2010-06-02
2010-03-25	2010-03-25	Östersund. Arbete m Malin ER, Portalen mm		116786	Transferred	150,00	Niklas Bergman	2010-03-29
2010-02-11	2010-02-11	Östersund. Utbildning ER attestanter o b...		116393	Transferred	150,00	Niklas Bergman	2010-02-12
2010-02-08	2010-02-10	Karlstad. Logicas utvecklingsgrupp för mo...		116328	Transferred	424,00	Niklas Bergman	2010-02-12
2010-01-25	2010-01-25	Östersund. Egenrapportering, utbildning ...		116222	Transferred	150,00	Niklas Bergman	2010-01-28
2009-10-27	2009-10-29	Karlstad. Logicas utvecklingsgrupp Palass...		115156	Transferred	466,00	Niklas Bergman	2009-11-09
2009-10-21	2009-10-21	Östersund. Arbete med ny webbstruktur,...		115088	Transferred	150,00	Niklas Bergman	2009-10-27
2009-09-30	2009-10-02	Kristianstad. Palasso-nätverket, systema...		114854	Transferred	1060,00	Niklas Bergman	2009-10-20
2009-08-26	2009-08-26	Östersund. Arbete med ny webbstruktur		114622	Transferred	150,00	Niklas Bergman	2009-09-07
2009-06-09	2009-06-10	Storhogna, förvaltningsdagar		114266	Transferred	334,00	Niklas Bergman	2009-09-14
2009-04-20	2009-04-20	Östersund. Arbete m statistik scb mm		113360	Transferred	150,00	Niklas Bergman	2009-04-22