Staff Portal How-To Guide

Oxford House Expense Tracker

Version 1.1 | January 2026

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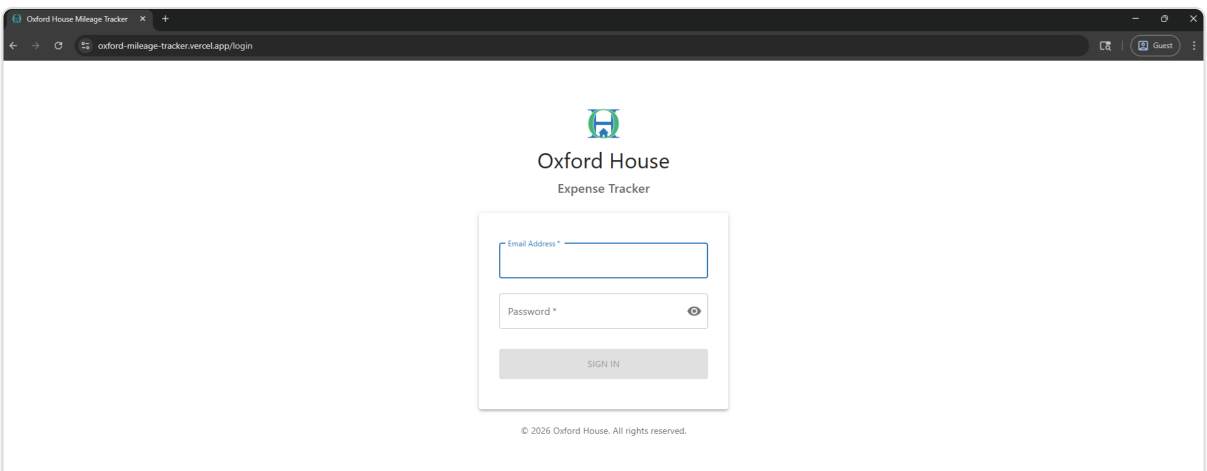
Quick Start Guide

Get Started in 5 Minutes

This quick start guide will help you get up and running with the Staff Portal in just a few minutes.

Logging In



1 **Navigate to the Portal**

Open your web browser and go to the Oxford House Expense Tracker web portal: **https://oxford-mileage-tracker.vercel.app/**

2 **Enter Credentials**

Enter your email address and password on the login screen. Your temporary password is **Firstnamewelcome1** (e.g., Johnwelcome1).

3 Change Your Password (First Login)

On your first login you will be prompted to change your temporary password. Choose a new password that meets the security requirements and save it somewhere safe.

4 Access Your Portal

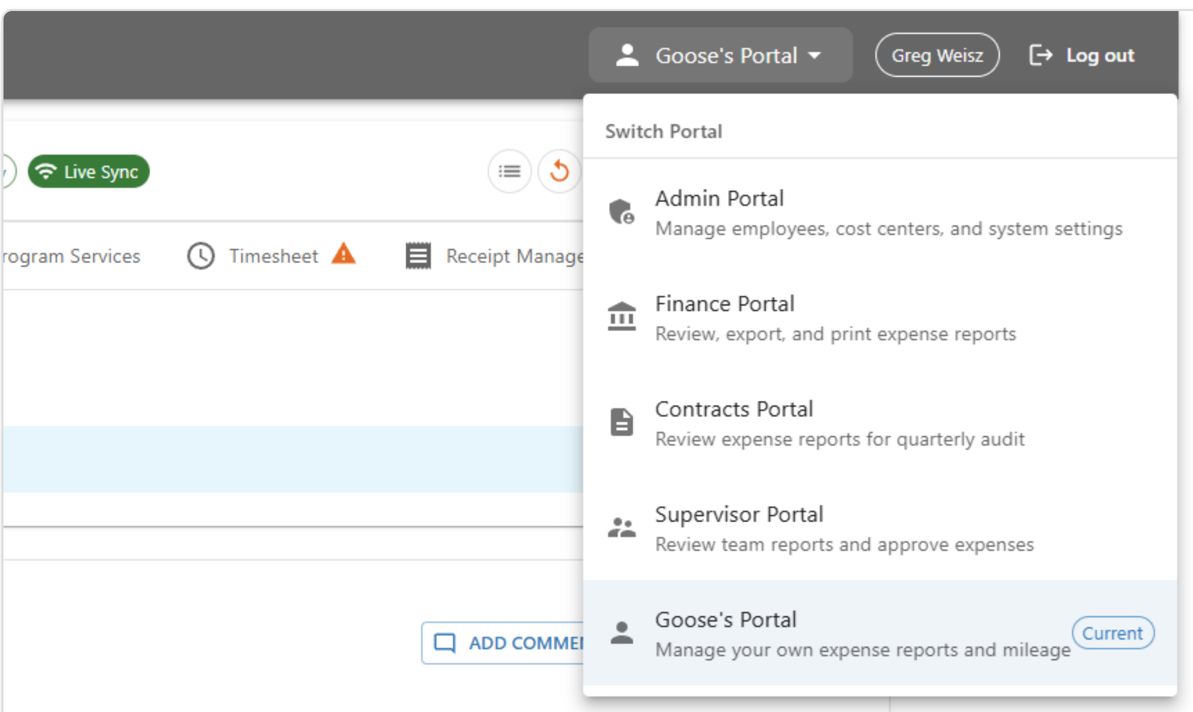
After logging in, you'll be taken to your personalized portal. The portal name appears in the header (e.g., "John's Portal").

Portal Switching

If you have access to multiple portals (e.g., Staff, Supervisor, Finance, Contracts, Admin), you can switch between them:

1 Find Portal Switcher

Look for the portal switcher dropdown in the header, typically near your name or in the navigation area.



2 Select Portal

Click the dropdown to see all portals you have access to based on your role and permissions. Select the portal you want to use.

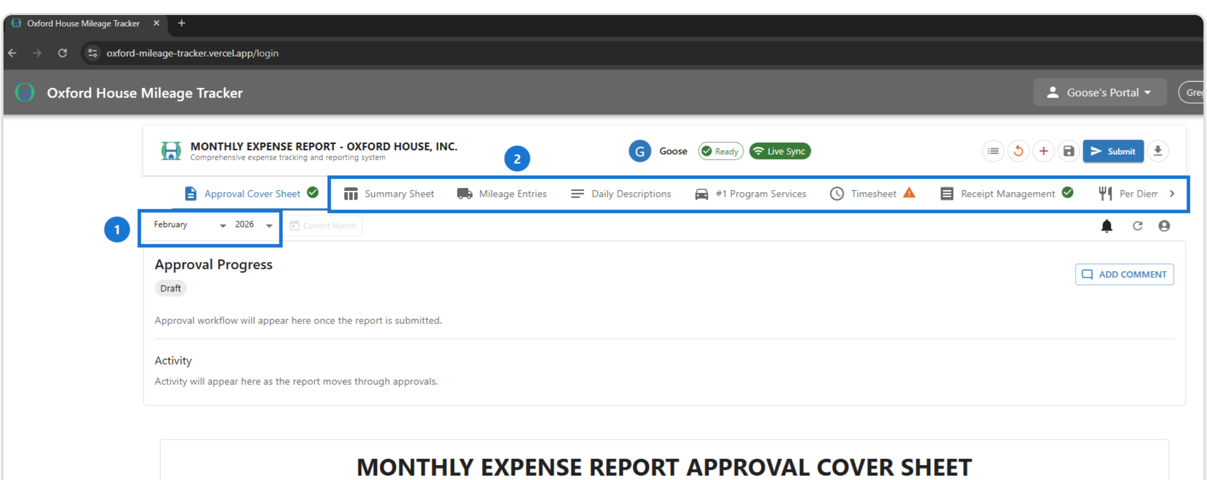
3 Portal Loads

The selected portal will load with its specific features and interface. Your portal preference is saved for future logins.

> **Tip: Portal Access**
>
> Your access to different portals is determined by your role and permissions assigned by your administrator. If you don't see a portal you expect, contact your administrator.

> **Tip: Bookmark the Portal**
>
> Bookmark the portal URL in your browser for quick access. You can also save your login credentials in your browser if your organization's security policy allows it.

Viewing Your Reports



1 Select Month and Year

Use the month and year selectors at the top of the portal to choose which month's report you want to view.

2 Navigate Tabs

The tab bar at the top of the report scrolls **left and right** so you can see all tabs. Swipe or use the scroll area to reveal additional tabs.

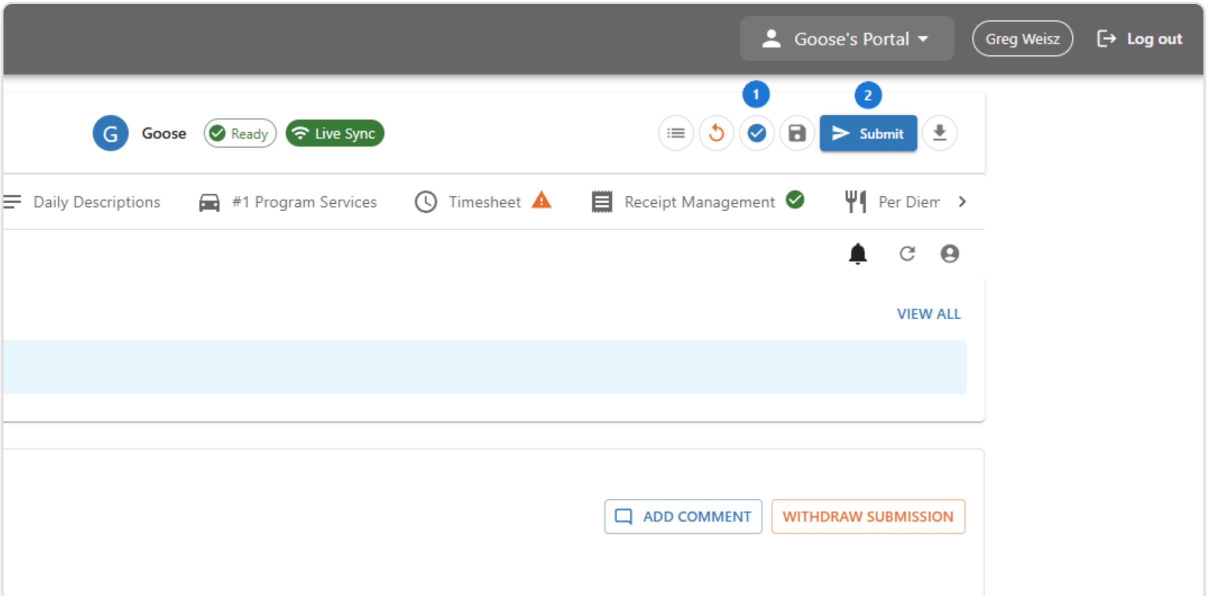
The portal includes these tabs (you may have multiple cost center tabs):

- **Approval Cover Sheet** - Sign and complete the approval cover
- **Summary Sheet** - Totals and summary for the month
- **Mileage Entries** - View and edit mileage entries
- **Daily Descriptions** - View and edit daily notes
- **Cost Center tabs** (e.g., #1 Program Services) - Travel and expenses by cost center, if you have multiple
- **Timesheet** - View and edit hours tracking
- **Receipt Management** - View and manage receipts
- **Per Diem** - View and manage per diem claims

3 Review Your Data

Click through each tab to review all your entries for the selected month. Remember to scroll the tab bar left or right to access every tab.

Submitting a Report



1 Review Completeness

Before submitting, review your report to ensure all entries are complete and accurate. Check the "Check Completeness" button if available.

2 Click Submit Report

Once you've reviewed everything, click the "Submit Report" button in the header.

3 Confirm Submission

Confirm that you want to submit the report. Once submitted, you can no longer edit entries for that month (unless revisions are requested).

Important: Report Locking

Once a report is submitted, it is locked and cannot be edited unless a reviewer requests revisions. You can **withdraw** a submission only if no one has approved it yet (see Withdraw Submission below). Otherwise, make sure all entries are complete before submitting.

Withdrawing a Submission

If you need to make changes after submitting (for example, you forgot an entry or something came up), you can withdraw your report **only before the first reviewer has approved it**.

1 Check Your Report Status

On the Approval Progress card, if you see a **Withdraw Submission** button, your report is still with the first reviewer and can be withdrawn.

2 Click Withdraw Submission

Confirm that you want to withdraw. The report will return to **Draft** and you can edit it again, then submit when ready.

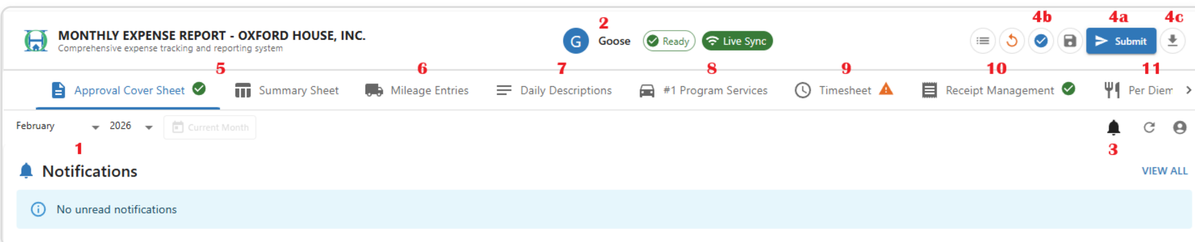
3 Resubmit

After making your changes, use **Submit Report** again as usual.

> **When Can I Withdraw?**
>
> Withdraw is only available when the report is still at the first approval step (Senior Staff or Supervisor). Once anyone has approved and the report has moved to the next step, you must wait for a revision request to make changes.

Comprehensive Reference

Portal Overview and Navigation



Portal Layout

The Staff Portal is designed to give you a comprehensive view of your expense data in a spreadsheet-like interface. Refer to the screenshot above and the numbered items below (you can add these numbers to your own screenshot for reference):

Header Section

- **1. Month/Year Selector** - Choose which month's report to view
- **2. Employee Name** - Displays your name (e.g., "Goose's Portal")
- **3. Notification Bell** - Shows alerts and notifications
- **4. Action Buttons** - Submit Report (4a), Check Completeness (4b), Export PDF (4c). The tab bar (5–9) scrolls left and right to reveal all tabs.

Tab Navigation

The portal uses tabs to organize different types of data. Scroll the tab bar left or right to see all tabs:

- **5. Approval Cover Sheet / Summary Sheet** - Sign-off and monthly totals

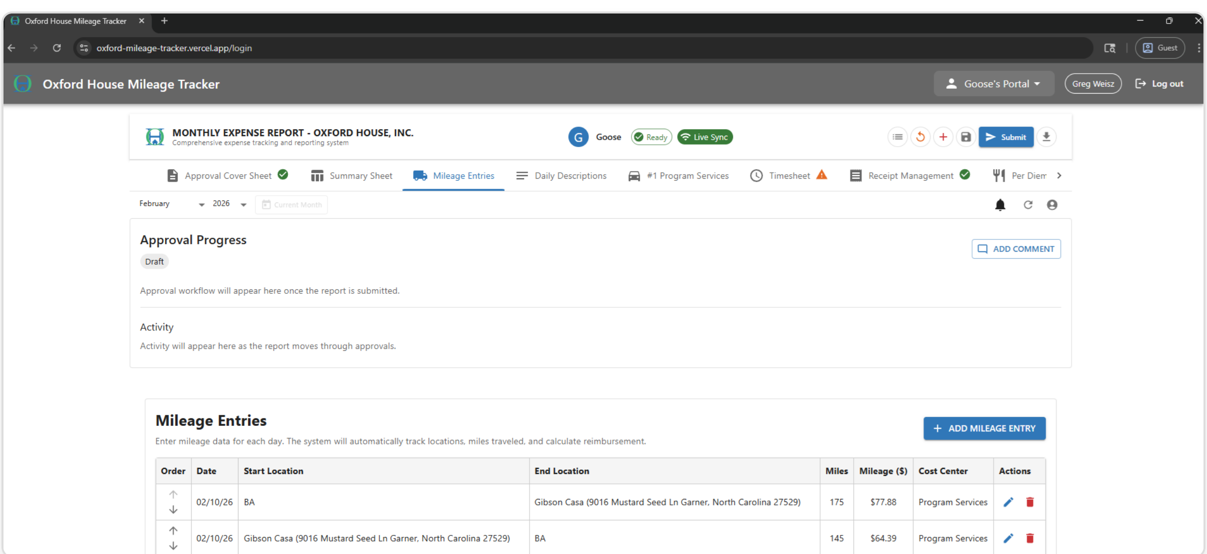
- **6. Mileage Entries** - View and edit mileage entries (date, start/end location, miles, cost center; reorder, edit, delete)
- **7. Daily Descriptions Tab** - Daily notes and descriptions
- **8. Cost Center tabs** (e.g., #1 Program Services) - If you have multiple cost centers
- **9. Timesheet** - Time tracking entries
- **10. Receipt Management** - All captured receipts
- **11. Per Diem** - Per diem claims (more tabs may appear to the right; scroll to see them)

Real-time Status Indicator

Look for the sync status indicator in the header. It shows:

- **Green** - Data is synced
- **Yellow** - Syncing in progress
- **Red** - Sync error (check your connection)

Viewing Mileage Entries



Mileage Entries Tab

The Mileage Entries tab shows your mileage data for each trip. Use the **+ ADD MILEAGE ENTRY** button to add new entries. Refer to the screenshot above and the numbered items below (you can add these numbers to your own screenshot for reference):

- **1. Reorder** - Use the up/down arrows to reorder entries within the same day
- **2. Date** - The date of each trip
- **3. Start Location** - Starting point for the trip (e.g., BA for base address or a full address)
- **4. End Location** - Destination for the trip
- **5. Miles** - Distance for the entry
- **6. Mileage ($)** - Calculated reimbursement (miles × rate, e.g. $0.445)
- **7. Cost Center** - Cost center the entry is assigned to (e.g., Program Services)
- **8. Actions** - Edit (pencil icon) to modify the entry; Delete (trash icon) to remove it

> **Tip: Reordering**
>
> You can reorder your entries within the day of each trip using the arrow icons in the first column. This lets you adjust the sequence of reported travel for that day.

Editing Mileage Entries

1 Click on a Cell

Click on any cell in the mileage table to edit it.

2 Make Changes

Enter your changes in the edit field that appears.

3 Save Changes

Press Enter or click outside the cell to save. Changes are saved automatically.

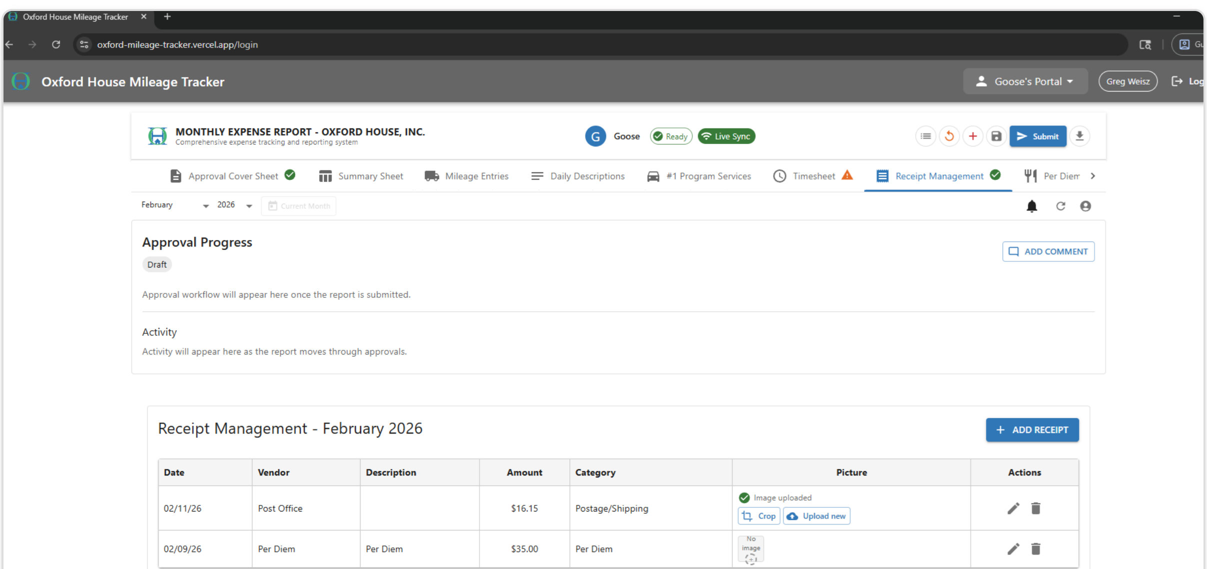
Adding New Mileage Entries

To add a new mileage entry:

1. Navigate to the Mileage Entries tab
2. Click the **+ ADD MILEAGE ENTRY** button
3. Fill in the required information (date, start location, end location, miles, cost center)
4. Save the entry

> **Tip: Bulk Editing**
>
> You can edit multiple cells in the same row. Just click on each cell you want to change, make your edits, and they'll all be saved together.

Viewing Receipts



Receipts Tab

The Receipts tab displays all receipts you've captured, either from the mobile app or uploaded through the web portal. For each receipt, you can see:

- Date
- Vendor/merchant name
- Amount

- Category
- Cost center
- Description
- Receipt image (thumbnail)

Viewing Receipt Details

1 **Click on a Receipt**

Click on any receipt in the list to view its details.

2 **View Full Image**

The receipt detail view shows the full receipt image and all associated information.

3 **Edit if Needed**

You can edit receipt details (amount, category, cost center, description) if the report hasn't been submitted yet.

Cropping a Receipt Image

You can adjust the visible area of a receipt image using the **Crop** option:

1. Open a receipt that has an image (click the receipt in the list).
2. Click the **Crop** (crop) icon or button.
3. In the crop dialog, drag the corners or edges to select the area to keep. This is useful for trimming borders or focusing on the receipt content.
4. Click **Apply** to save the cropped image back to the receipt.

Uploading Receipts via Web

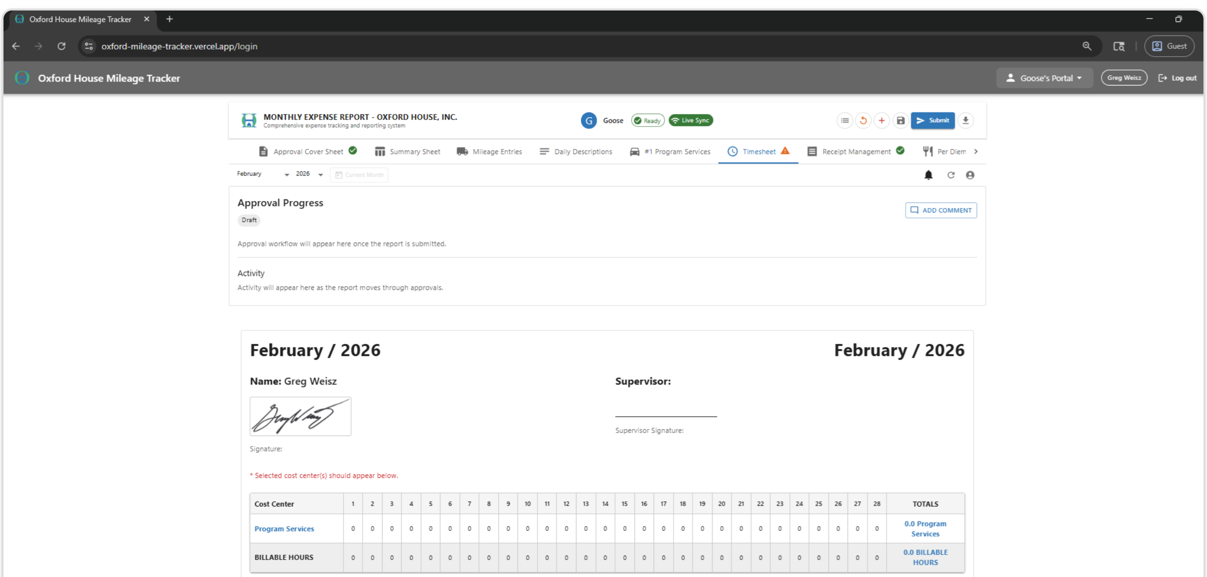
If you need to upload a receipt through the web portal:

1. Go to the Receipts tab
2. Click "Add Receipt" or "Upload Receipt"

3. Select an image file from your computer. The portal supports both image files (JPG, PNG) and PDF files
4. Fill in the receipt details (date, amount, category, cost center)
5. Save the receipt

> **PDF Receipt Support**
>
> The portal supports PDF receipt uploads in addition to image files. This is especially useful for digital receipts or scanned documents. PDF receipts are displayed in the receipt viewer just like image receipts.

Viewing Hours Worked



Hours Worked Tab

The Hours Worked tab shows a grid view of your time tracking entries. The grid displays:

- Days of the month (columns)
- Cost centers (rows)
- Hours worked for each day/cost center combination

- Daily totals
- Monthly totals by cost center

Editing Hours

1 Click on a Cell

Click on any cell in the hours grid to edit hours for that day and cost center.

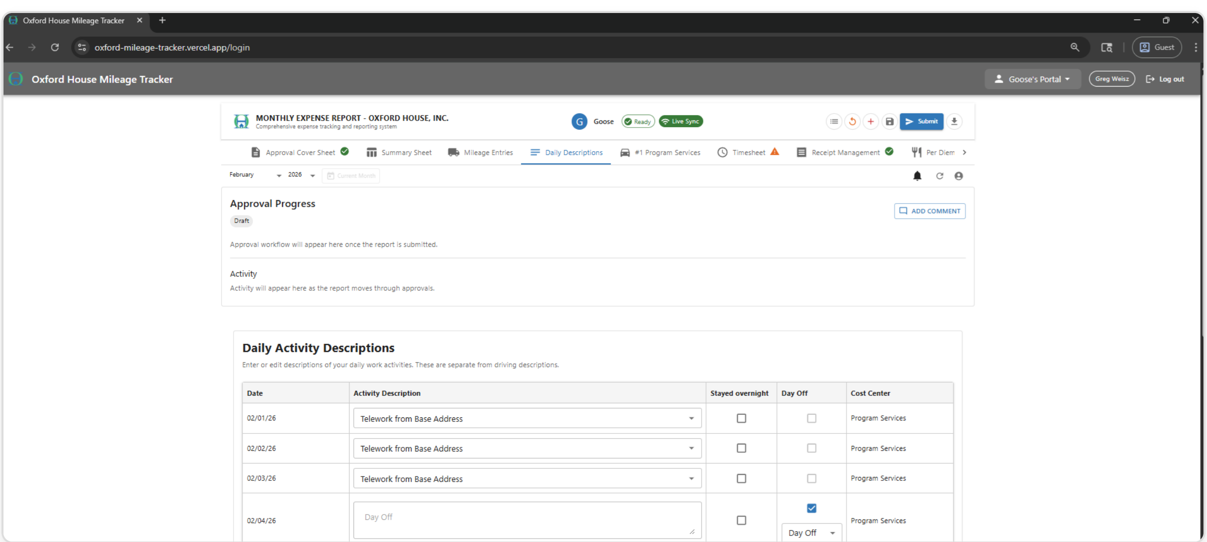
2 Enter Hours

Enter the number of hours worked. You can use decimal values (e.g., 7.5 for 7 hours 30 minutes).

3 Save

Press Enter or click outside the cell to save. The totals will update automatically.

Viewing Daily Descriptions



Daily Descriptions Tab

The Daily Descriptions tab allows you to view and edit notes for each day of the month. This is useful for:

- Documenting work activities
- Providing context for expenses
- Meeting notes
- Important events or reminders

Adding or Editing Descriptions

1 **Click on Description Cell**

In the Mileage Entries tab (or Daily Descriptions tab), you can edit daily notes. For description of activity, use the Daily Descriptions tab or the description field for the day.

2 **Edit in Large Text Box**

A large, multi-line text box will appear that expands to show all your content. This makes it easy to:

- See long descriptions without scrolling
- Find specific text to edit
- Add or remove content comfortably

Type your description in the text field. There's no character limit, and the box will expand as you type.

3 **Save Your Changes**

Press Ctrl+Enter (or Cmd+Enter on Mac) to save, or click outside the text box. Your changes are saved immediately and won't be overwritten by the system.

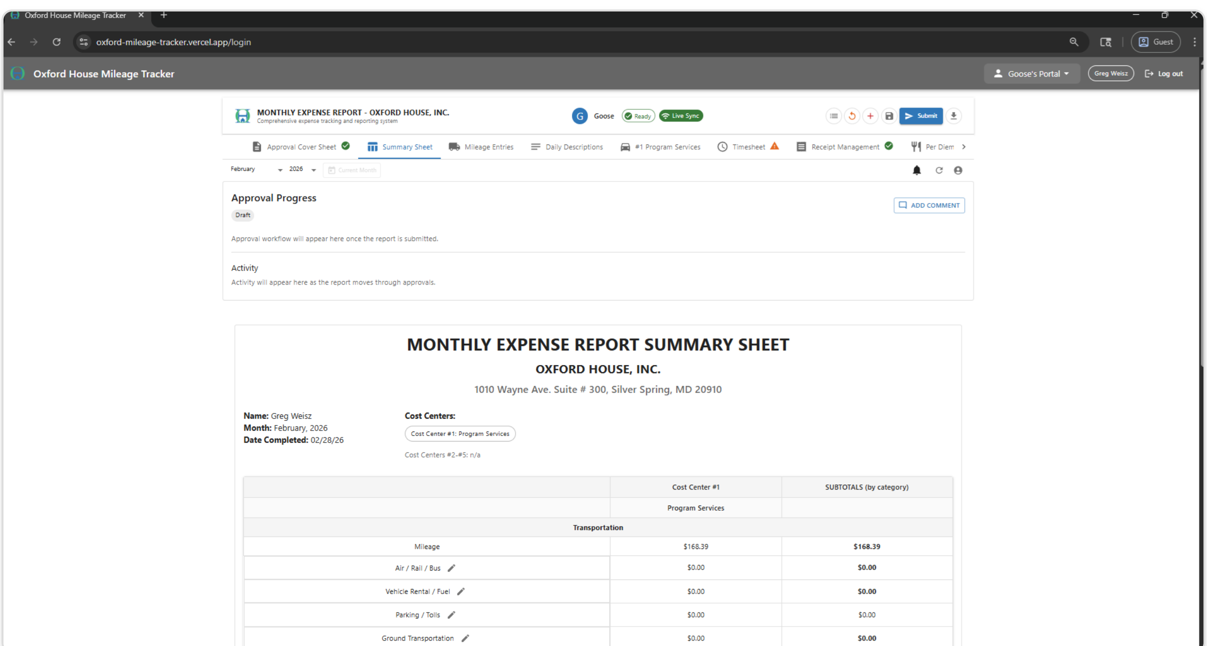
Description Content

The description field shows your daily work activities and automatically includes a driving summary based on your mileage entries. Odometer readings are no longer included in descriptions - they appear in the separate Odometer Start and Odometer End columns instead.

Important: Description Persistence

When you delete content from a description and save it, the deleted content will not reappear. The system respects your edits and only shows what you've entered, plus the automatically generated driving summary.

Monthly Report Creation



Monthly Summary Tab

The Monthly Summary tab provides a comprehensive overview of your expense report for the selected month. It includes:

Summary Totals

- **Total Miles** - Sum of all mileage entries
- **Total Mileage Amount** - Calculated reimbursement amount
- **Total Receipts** - Number of receipts and total amount
- **Total Hours** - Hours worked for the month

Category Breakdowns

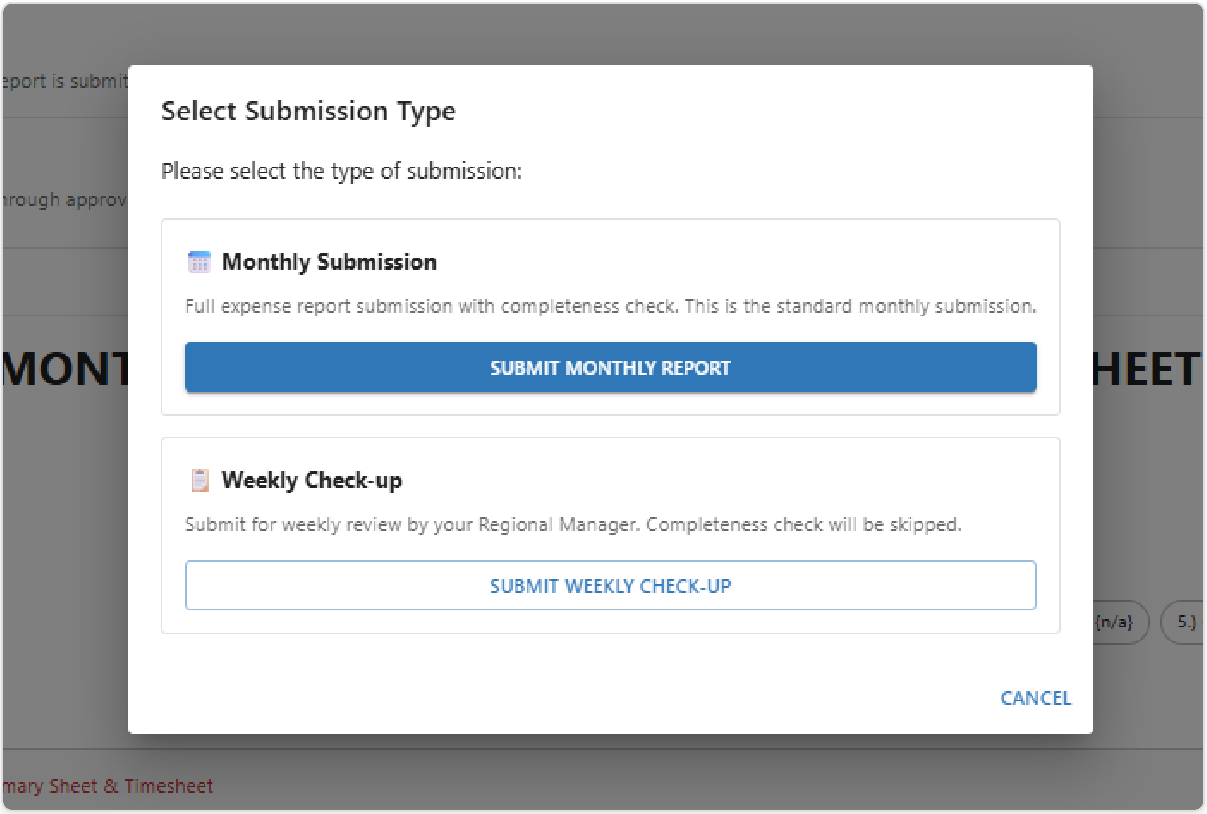
The summary shows totals by receipt category:

- Air/Rail/Bus
- Vehicle Rental/Fuel
- Parking/Tolls
- Ground Transportation
- Hotels/Airbnb
- Per Diem
- Phone/Internet/Fax
- Shipping/Postage
- Printing/Copying
- Office Supplies
- Other expenses

Cost Center Breakdown

You can see how expenses are allocated across different cost centers, helping you verify that everything is categorized correctly.

Report Submission Workflow



Before Submitting

Before submitting your report, it's important to:

1. **Review All Entries** - Go through each tab and verify all data is accurate
2. **Check Completeness** - Use the "Check Completeness" button to identify any missing information
3. **Verify Totals** - Check the Monthly Summary to ensure totals look correct
4. **Confirm Cost Centers** - Verify that expenses are allocated to the correct cost centers

Submitting Your Report

1 **Click "Submit Report"**

Click the "Submit Report" button in the header. This button is only available when viewing your own report for the current or past months.

2 Choose Submission Type

A dialog will appear asking you to choose your submission type:

- **Monthly Submission** - For final monthly reports. This option runs a completeness check to ensure all required information is present (signatures, acknowledgments, receipts, etc.).
- **Weekly Check-up** - For interim submissions or progress updates. This option skips the completeness check, allowing you to submit even if some items are still pending.
- **Cancel** - Return to editing your report

3 Completeness Check (Monthly Submission Only)

If you selected "Monthly Submission", the system will check for:

- Missing employee signature
- Missing employee certification acknowledgment
- Missing supervisor signature (if you're a supervisor)
- Missing receipts for high-value expenses
- Missing cost center assignments for hours
- Other required information

If issues are found, you'll see a list of what needs to be fixed before you can submit.

4 Confirm Submission

After passing the completeness check (or if using Weekly Check-up), confirm your submission. The report will be locked and sent to your supervisor.

5 Report Locked

Once submitted, the report is locked and cannot be edited. You'll see a status indicator showing "Submitted" or "Pending Approval".

6 Notification Sent

Your supervisor will receive a notification that your report is ready for review.

When to Use Each Submission Type

- **Monthly Submission** - Use this for your final monthly report when everything is complete and ready for approval.
- **Weekly Check-up** - Use this for progress updates, interim reviews, or when you want supervisor feedback before the month ends.

Important: Report Locking

Once a report is submitted, you cannot make changes unless your supervisor requests revisions. Double-check everything before submitting!

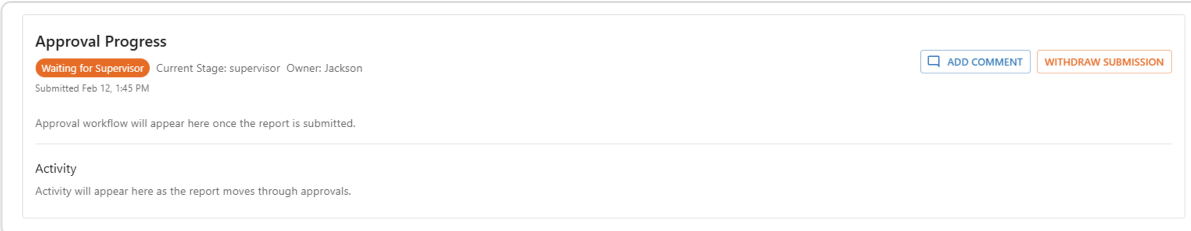
What Happens After Submission

Reports follow an approval chain. After you submit:

1. **Senior Staff (if applicable)** – If you have a Senior Staff assigned, they review first. They can approve (send to Supervisor) or request revisions (send back to you).
2. **Supervisor** – Your supervisor reviews next. They can approve (send to Finance) or request revisions (send back to you or to Senior Staff).
3. **Finance** – Finance performs final review and approval.
4. **Revisions** – If any reviewer requests revisions, you'll get a notification. Make the requested changes and use **Resubmit for Approval** to send the report back through the same chain.

Weekly check-up submissions stop at Supervisor approval and do not go to Finance.

Viewing Report Status



Status Indicators

The portal displays the current status of your report using color-coded chips or badges:

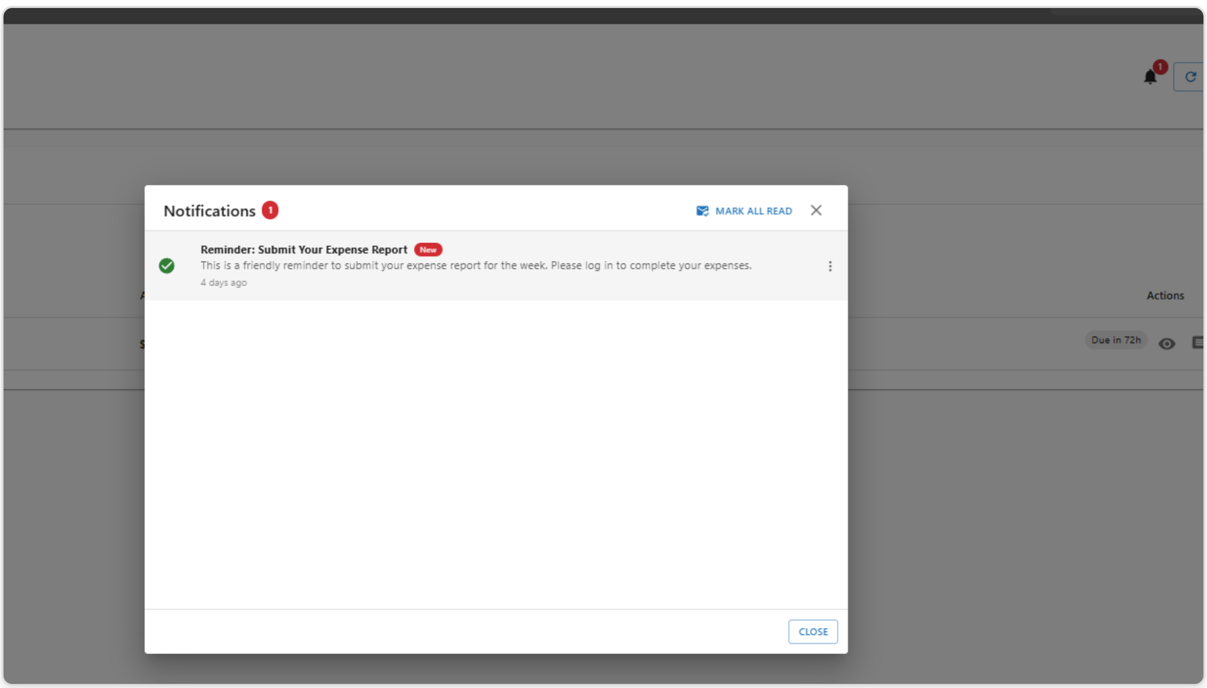
Status	Meaning	What You Can Do
Draft	Report is not yet submitted	Edit entries, add new entries, submit report
Submitted / Waiting for Senior Staff	Report is with Senior Staff (if you have one) or first reviewer	View only; you may see **Withdraw Submission** to take it back to draft
Waiting for Supervisor	Senior Staff approved (or you have no Senior Staff); report is with Supervisor	View only; Withdraw may still be available if no one has approved yet
Waiting for Finance	Supervisor approved; report is with Finance	View only
Needs Revision	A reviewer requested changes	Edit entries per comments, then **Resubmit for Approval**
Approved	Fully approved	View only, export PDF

Approval Status Card

The portal includes an approval status card that shows:

- Current approval stage
- Who is reviewing the report
- Approval history with timestamps
- Any comments or revision requests

Notifications and Alerts



Notification Bell

The notification bell in the header shows you important alerts and updates:

- **Report Approval** - When your supervisor or finance approves your report
- **Revision Requests** - When changes are needed
- **Report Status Changes** - Updates on your report's progress
- **System Messages** - Important announcements

Viewing Notifications

1. **Click the Bell Icon**

Click the notification bell in the header to open the notifications panel.

2. **Review Notifications**

You'll see a list of all your notifications, with the newest at the top.

3. **Click to View Details**

Click on any notification to view details or navigate to the relevant report.

4. **Mark as Read**

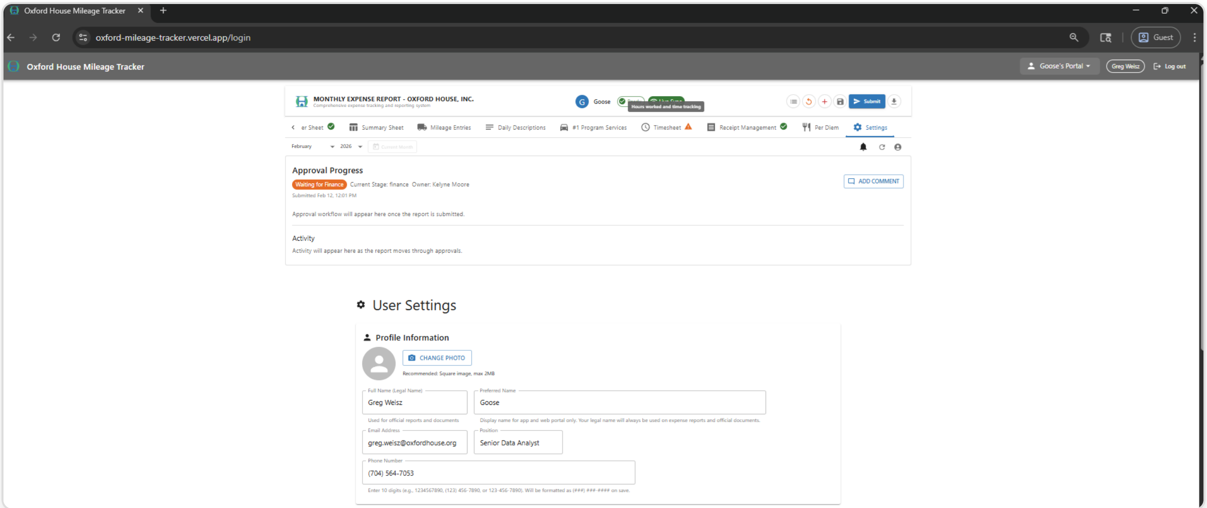
Notifications are automatically marked as read when you view them, or you can manually mark them as read.

Email Notifications

In addition to in-app notifications, you may receive email notifications for:

- Report submission confirmations
- Approval notifications
- Revision requests
- Weekly reminders (if enabled in preferences)

Profile Settings



Accessing Settings

To access your profile settings, look for a settings icon or your name in the header, then click to open the settings menu.

Available Settings

- **Profile Information** - View your name, email, position, and other details
- **Password Change** - Update your password (if allowed)
- **Preferences** - Configure portal preferences
- **Notification Preferences** - Control which notifications you receive

User Preferences

In the preferences section, you can configure:

- **Default Cost Center** - Set your most commonly used cost center
- **Email Notification Preferences** - Choose which email notifications to receive
- **Sunday Reminder** - Enable or disable weekly expense reminders
- **Portal Theme** - Light or dark mode (if available)

Tips & Best Practices

When to Submit Reports

Recommended Timeline

- **End of Each Month** - Submit your report within a few days of the month ending
- **Before Deadline** - Check with your supervisor for specific submission deadlines
- **After Completeness Check** - Always run the completeness check before submitting

Best Practice

Don't wait until the last minute to submit. Give yourself time to review and make any necessary corrections before the deadline.

How to Check Report Completeness

Using the Completeness Checker

1 **Click "Check Completeness"**

This button is available in the header when viewing your report.

2 **Review the Report**

The completeness checker will identify:

- Missing daily descriptions
- Days with mileage but no hours
- Days with hours but no mileage
- Missing cost center allocations
- Other potential issues

3 **Address Issues**

Fix any identified issues before submitting your report.

Manual Review Checklist

Before submitting, manually verify:

- All mileage entries have start and end locations
- All receipts have amounts and categories
- Hours are logged for all work days
- Daily descriptions are added for significant days
- Cost centers are correctly assigned
- Totals look reasonable

Understanding Approval Status

Approval Workflow

Your reports go through a multi-stage approval process (some steps apply only if you have a Senior Staff assigned):

1. **Draft** – You're still working on it. You can withdraw a submitted report only before the first approval.

2. **Submitted / Waiting for Senior Staff** – First reviewer (Senior Staff if applicable).
3. **Waiting for Supervisor** – Supervisor is reviewing.
4. **Waiting for Finance** – Finance is reviewing (monthly reports only; weekly check-ups stop at Supervisor).
5. **Needs Revision** – A reviewer requested changes; edit and use Resubmit for Approval.
6. **Approved** – Fully approved and processed.

What to Expect

- **Review Time** - Supervisors typically review within a few business days
- **Revision Requests** - Don't worry if revisions are requested - it's normal and helps ensure accuracy
- **Approval Notifications** - You'll be notified at each stage
- **Final Approval** - Once finance approves, your reimbursement will be processed

Tip: Be Proactive

If your report has been in "Submitted" status for more than a week, consider following up with your supervisor to ensure they received the notification.

Troubleshooting

Can't See My Data

No Data Showing

Problem: The portal shows no data for the selected month.

Solutions:

- Verify you've selected the correct month and year
- Check if you've created any entries for that month (via mobile app or web portal)
- Ensure your data has synced from the mobile app (if you use it)
- Try refreshing the page
- Check your internet connection
- Contact support if data should be there but isn't

Missing Entries

Problem: Some entries are missing from your report.

Solutions:

- Check if entries were created in a different month
- Verify entries were saved (not just started but not completed)
- If using mobile app, ensure sync completed successfully
- Check if entries were deleted accidentally
- Look in other months to see if entries were misdated

Report Won't Submit

Submit Button Disabled

Problem: The "Submit Report" button is grayed out or not clickable.

Solutions:

- Verify you're viewing your own report (not someone else's)
- Check that the report is in "Draft" status (not already submitted)
- Ensure you're viewing the current or past month (not future months)
- Try refreshing the page
- Check for any error messages in the browser console
- Contact support if the issue persists

Submission Error

Problem: You get an error message when trying to submit.

Solutions:

- Read the error message carefully - it may indicate what's wrong
- Run the completeness check to identify missing information
- Ensure all required fields are filled
- Check your internet connection
- Try submitting again after a few moments
- If the error persists, contact support with the error message

Missing Entries

Entries Not Appearing

Problem: Entries created in the mobile app don't appear in the web portal.

Solutions:

- Check the mobile app's sync status - ensure sync completed
- Verify the entries were created for the correct month
- Refresh the web portal page
- Check if entries were created but not saved
- Wait a few minutes and refresh - sync may be in progress
- If using offline mode on mobile, ensure you're back online and sync has completed

Entries Disappeared

Problem: Entries that were there before are now missing.

Solutions:

- Check if the report was submitted and locked (submitted reports may have different views)
- Verify you're viewing the correct month
- Check if entries were deleted (accidentally or by supervisor during revision)
- Look in the revision history if revisions were requested
- Contact support if entries should be there but aren't

General Issues

Portal is Slow

Problem: The portal loads slowly or is unresponsive.

Solutions:

- Check your internet connection speed
- Close other browser tabs to free up memory
- Clear your browser cache
- Try a different browser

- Disable browser extensions that might interfere
- Contact support if the issue persists

Can't Edit Entries

Problem: You can't edit entries that should be editable.

Solutions:

- Check if the report has been submitted (submitted reports are locked)
- Verify you're viewing your own report
- Check the report status - if it's "Approved", you can't edit
- If revisions were requested, ensure you're addressing the specific items marked for revision
- Try refreshing the page
- Contact support if you believe you should be able to edit

Sync Issues

Problem: Data isn't syncing between mobile app and web portal.

Solutions:

- Check the sync status indicator in the portal header
- Ensure you have an active internet connection
- Try manually refreshing the page
- In the mobile app, check sync status and try manual sync
- Wait a few minutes - sync may be in progress
- Contact support if sync consistently fails

Still Having Issues?

If you've tried the troubleshooting steps above and are still experiencing problems, contact your system administrator or technical support. Be prepared to provide:

- Description of the problem
- Steps you've already tried
- Browser type and version
- Screenshots of any error messages
- The month and year you're trying to view

This document is part of the Oxford House Expense Tracker documentation suite.

For technical support, please contact your system administrator.

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