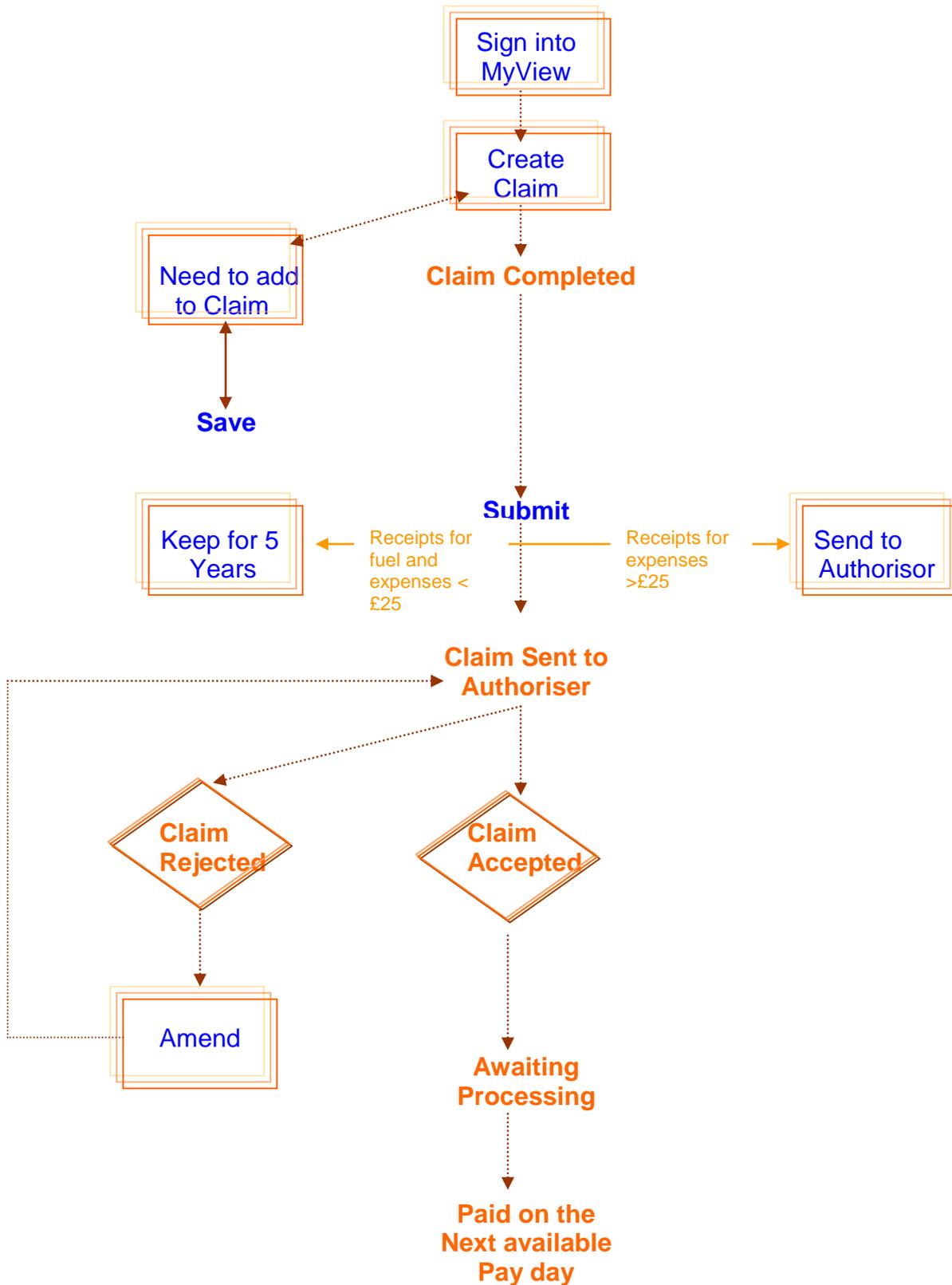


Expenses Claim Process Overview – Employee



Expenses Claim Guidance Notes - Employee

Getting Started

To get to the page where you can create a new claim you can use: either:

1. The “GO TO” drop down menu on the MyView home banner and choose “Car mileage and expenses
2. Home page click on the title “Car Mileage & Expenses”
3. Click [here](#) to enter Mileage & Expenses at the end of the description



Generating a Claim

Post

If you have more than one post you will need to open up the dropdown menu and click on the post for which you have undertaken the journey. If you need to make a claim in more than one post, you will need to create a new claim for each. It is important to choose the correct post in which you have done the journey because:

This will determine which budget you are paid from

And

Who the claim will be sent to for authorisation. If you pick the wrong post for the journey and it gets sent to the wrong manager to authorise, the claim form will be rejected and may be delayed.

By clicking on “**Create New Claim**” you will open the claim form to start inputting.

Completing the Claim Form

Position	Clerical Assistant		
Description	New Claim		
Mileage [help]			
Journey			
Date	Vehicle	Journey	Mileage
<input type="text"/>	<input type="text" value="- Select -"/>	<input type="text" value="- Select -"/>	<input type="text"/>
Actual mileage travelled	Private Miles	Type	
<input type="text"/>	<input type="text"/>	<input type="text" value="- Select -"/>	
Start Time	End Time	Journey Start From	Calling At
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			Journey End At
			<input type="text"/>
			Reason For Journey
			<input type="text"/>
Expenses (All) [help]			
	Date	Value	
	<input type="text" value="- Select -"/>		
Total for Expenses (All)		<input type="text" value="0.00"/>	
GRAND TOTAL		<input type="text" value="0.00"/>	

[Back] [Reset] [Save] [Submit]

Position

Make sure that this is the post that the travel and expenses relate to

Description

Delete/overtyping the words "New Claim" with:

1. The name of the manager responsible for the work in which you incurred the travel/expenses.

For example, your functional (main) line manager for this post will authorise **all** your travel claims forms irrespective of who you did the work for. If you have been working on a number of projects that are being managed by a different person, you will need to create a form for each project manager and enter their names in this box. This will help your functional manager reconcile your claim and authorise it for payment.

AND

2. After the line manager's name include the period of the claim. If you are completing the form over a period of time, you may need to go back into this field before submitting it for authorisation.

e.g.

Mr Arty is employed as an architect for Manager Mr Sketchit and has undertaken business journey's for the period 12/04/2011 to 28/04/2011, However he has been involved in a special project building a Scouts hut which is being project managed by Mr Baden-Powell, during April this required business journey's for the period 20/04/2011 to 28/04/2011. Mr Arty will need to create two new claims both against his current post

The entry in this box for each claim will therefore be:

"Mr Sketchit 12/04/2011 to 28/04/2011"

And on the other claim:

"Mr Baden-Powell 20/04/2011 to 28/04/2011"

Mileage

[help]

If you click onto the help button it will expand to remind you what you need to complete in this Section of the form.

Date

This is the date of the journey that you are claiming for. You can either use the calendar button and window in and click on the date or enter the six digits of the date.

e.g.

For the date of 3rd May 2011 enter 030511 and press the tab key.

Vehicle

You will need to display the dropdown pick list by clicking on the box at the side of the entry field and use the drop down menu to pick the range that the cubic capacity (cc) of your car.

e.g.

If your car has is a 1.2 litre (1200cc) then pick 12001500

NB: For user type "amap Shropshire" this is not relevant as all engine sizes are paid at the same rate. You can therefore "tab" over this field.

Journey

This box is currently not being used and therefore you can just "tab" over this.

Mileage

This field is automatically calculated for you; you cannot enter in this box. When you complete the “Actual mileage travelled” and “Private miles boxes”, the system will calculate the number of miles and populate this box with the miles that you will be paid for.

Actual Mileage Travelled

Enter the full amount of miles that you have travelled, from the start to the end of your journey. This is regardless of whether you start/finish from home or a place of work.

Private miles

Enter either the number of miles that you would normally travel to get to/from work or the number of miles that you can not claim for under any local agreement (e.g. the first and last 10 miles etc, your normal home to work mileage if starting from home). If you are unsure if any local agreement exists please make sure you check this with your authorising officer **BEFORE** you submit your claim.

If your journey was between two places of work and there are no local arrangements are in place to deduct miles from your journey, then you can either enter “0” or leave this field blank.

Type (this determines the rate per mile)

The latest scheme type that has been paid to you will default into this box. If this is correct for this claim line then you can proceed with the rest of the form. If this is not the case then you will need to open up the drop down menu and pick the type that is applicable for that journey.

TEACHERS ONLY – If you have been authorised by the Head Teacher to claim for a return journey to school, then you **MUST** choose a user type ending in “tax”. Payment for this type of journey is deemed to be profit by the Inland Revenue as it is your normal commuting journey, even though it is in addition to your usual commuting.

Start Time

Enter the time you started your journey using the 24hour clock (e.g. half past three in the afternoon would be entered as 1530 – you do not need to enter the “:”).

End Time

Enter the time you arrived at your final destination using the 24hour clock (e.g. quarter past five in the afternoon 1715 – you do not need to enter the “:”). There are checks within the system to ensure that the end time is later than the start time. If your journey involves an overnight stay, this will mean that you will have to enter the journey to your destination on a separate line to your return journey.

Journey Start From

Enter the place where you started your journey from. Give as much detail as possible for the authoriser to assess the miles of your journey including the town name.

Calling At

Enter all the places that you visited in the same way as the journey start field. This field holds 250 characters. If this is insufficient you will need to split the journey between a number of separate lines. You can add another line by clicking on the [+] on the right-hand side of form. Once a line has been completed this will change to [-]. If you click on this it will delete this line of entry.

Journey End At

Enter the place where you ended your journey. Give as much detail as possible for the authoriser to assess the miles of your journey including the town name.

Reason For Journey

Input the purpose for your journey including any client/course names

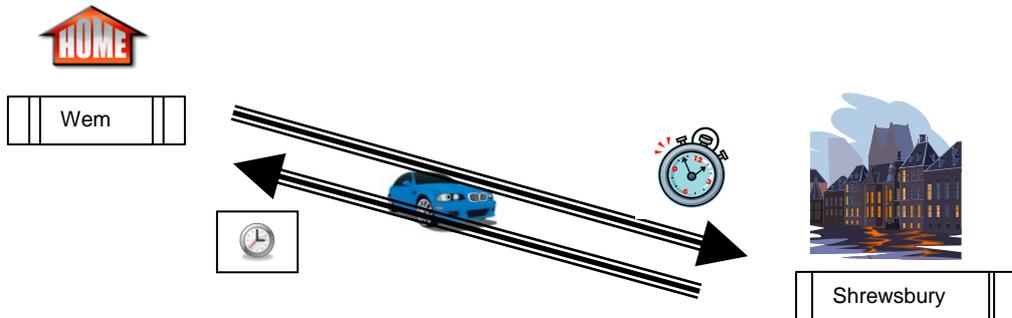
You must ensure that you enter all the relevant details to enable your authorising officer to be satisfied that the journey was; necessary, carried out and that the number is an accurate amount of miles claimed in accordance with the Council's policy.. If this is not the case your claim will be sent back to you without payment for correction. This may delay payment.

NB: Please also note that by submitting the claim you are also verifying that you have valid insurance for business use and an appropriate driving licence

This information is also required for auditing purposes and to ensure compliance with relevant legislation.

A reminder of the details required is held within the [help] on the form.

e.g.



In the above example the person left home in Wem at 12:55 to visit a place of work in Shrewsbury to audit some departmental accounts and when they finished they returned home for 15:00.

The entry on the form would be:

Position	Clerical Assistant				
Description	Mr Bloggs - 01.01.2012 - 31.01.2012				
Mileage [help]					
Journey					
Date	Vehicle	Journey	Mileage		
03/01/2012	12001500	- Select -	40		
Actual mileage travelled	Private Miles	Type			
50	10	01 LOCAL - MAIN RATE			
Start Time	End Time	Journey Start From	Calling At	Journey End At	Reason For Journey
12:55	15:00	Home (Wem)	ALD Shrewsbury	Home (Wem)	Auditing Accounts

Receipts

Each claim **must** be supported by a valid fuel VAT receipt obtained before the date of the first journey claimed. You must keep the fuel receipts yourself for a minimum period of 2 previous financial years (April to March) plus the current year. At any time during this retention period you may be asked to produce any or all of the stored receipts. Should you not be able to produce a supporting receipt, you will be asked to repay the amount reimbursed to you for those journeys and may be subject to disciplinary action.

NB: Receipts **must** be stored and retrieved in their original paper format

Expenses

Position Clerical Assistant
Description Mr Bloggs - 01.01.2012 - 31.01.2012

Mileage

Journey

Date	Vehicle	Journey	Mileage
03/01/2012	12001500	- Select -	40

Actual mileage travelled 50
Private Miles 10
Type 01 LOCAL - MAIN RATE

Start Time 12:55
End Time 15:00
Journey Start From Home (Wem)
Calling At ALD Shrewsbury
Journey End At Home (Wem)
Reason For Auditing Account

Expenses (All)

	Date	Value	Receipt	
Parking	03/01/2012	4.50	Y	[-]
		Description	Frankwell car park meeting at Guildhall	
Stationary	03/01/2012	27.50	01	[-]
		Description	Photocopying of accounts ledger and receipts	
		- Select -		
Total for Expenses (All)		32.00		

The claim adds up all the expenses that will be paid for this claim

Select

You must choose from the drop down menu the item of expenditure that you wish to claim for. If there is no corresponding item on the list then you **MUST** contact the helpline. There are special system settings against each expense type in relation to how the repayment is taxed and whether we can reclaim VAT. **DO NOT** just choose the “nearest” option as you may have tax taken off you and the Council may not be able to reclaim the VAT.

Once you have chosen the expenses type you cannot change it. If it is incorrect you will need to delete the whole line using the [-] box.

Receipts

You **MUST** have a receipt to be able to reclaim **ANY** business expenses. You must keep any supporting receipt for any single item less than £25.00 the same as those receipts for fuel (see above). For any item greater than £25.00, you must follow the instructions below:

For any item that has a value of less than £25.00, input a “Y” to indicate that you are storing a receipt to cover this expenditure. If you do not have a receipt then enter “N” and give a reason in the “Description” box.

Warning ! - If the authoring officer is not satisfied with the explanation the whole claim may be rejected.

For items that are over £25.00, then number them starting with "01". You should then write both the claim number (found on the Summary Sheet) and the corresponding number you entered in the "Receipt" box. Staple the receipt to the back of the summary and forward it to your authorising officer. Your claim will not be authorised until the authorising officer has received your receipts.

e.g.

Position Clerical Assistant
 Description Mr Bloggs - 01.01.2012 - 31.01.2012

Mileage

Journey

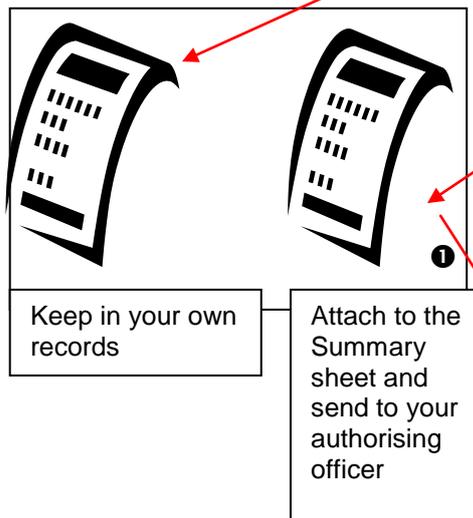
Date	Vehicle	Journey	Mileage
03/01/2012	12001500	- Select -	40

Actual mileage travelled 50
 Private Miles 10
 Type 01 LOCAL - MAIN RATE

Start Time 12:55
 End Time 15:00
 Journey Start From Home (Wem)
 Calling At ALD Shrewsbury
 Journey End At Home (Wem)
 Reason For Auditing Account

Expenses (All)

Date	Value	Receipt	
03/01/2012	4.50	Y	[-]
Description Frankwell car park meeting at Guildhall			
03/01/2012	27.50	01	[-]
Description Photocopying of accounts ledger and receipts			
- Select -			
Total for Expenses (All)		32.00	



Expense Claims Claim Form Summary

Employee Number 0773065
 Employee Name A SMITH
 Claim Number 000001283
 Claim Date 01/02/2012

Claim for the following:
 EXPENSES SUMMARY
 All figures in this claim are in Sterling

Expenses (All) 32.00
 TOTAL VALUE OF CLAIM: 32.00

MILEAGE SUMMARY
 TOTAL MILEAGE: 40

Expenses Link
 Expenses guidance for employees
 Expenses guidance for managers
 Test Captrite

[Print] [Continue]

Description

You will need to provide the authorising officer with enough information to justify your expenditure. For meal reimbursement (only for overnight stays from 01 October 2011), you must include the start and end time of your absence from your normal place of work as this is required to verify what can be paid.

e.g.

“Overnight stay at conference left 05/01/2012 at 17:00 returned 06/01/2012 at 09:00”

After Completing the Form

The screenshot shows a web form with a table and several buttons. At the top, there is a text input field and a dropdown menu labeled '- Select -'. Below this is a blue header bar with a '[help]' link. The table has two columns: 'Date' and 'Value'. The first row has an empty 'Date' cell and a '0.00' value. The second row has a greyed-out 'Date' cell and a '0.00' value. At the bottom right, there are four buttons: '[Back]', '[Reset]', '[Save]', and '[Submit]', which are circled in red.

Back

Do not select this unless you wish to delete the whole form and be returned to the MyView main menu.

Reset

This will clear all the entries you have made on this form but will keep the form for you to start inputting again.

Save

It you want to add further travel or expenses lines before sending to your authorising officer then you can click on “Save”. If anyone in the Payroll or HR Teams are in your record at the time you choose to save, your claim will be deleted and you will need to start again. In the unlikely event that this may occur, please contact the helpline, to ensure that your record has been released before you try completing your claim again.

Submit

When you do not need to add any further details to your claim, you can click on your saved claim in the “Open” Section of MyView and then Submit.

You can press submit without saving your claim first.

Once you have submitted your claim form you may withdraw it at any time (should you wish to change anything on it), until the authorising officer has authorised your claim.

When your claim is authorised you will receive an e-mail to confirm that your claim has been passed for payment. You can check when the claim will be paid by looking up the date on the table held on the HR website, by cross reference the date it was authorised. This date will be the date that the e-mail was sent.