

MyView User Guide

Expenses Module

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Contents

Expenses Module.....	3
Creating a New Claim Form	3
Travelling Expenses.....	4
To Re-Open a Saved Claim Form.....	9
Expenses Section	11
Submission of Claim for Payment	13
Withdrawing Submitted Claims	14

Expenses Module

All staff are expected to travel in the most economical manner appropriate to the discharge of their duties.

Basis of a claim:

- The normal starting and finishing place for official journeys will be the location where you are based.
- If you start a journey from a location other than your base or end a journey at a location other than your base, the mileage claimed should be limited to the "Additional Mileage" incurred as a result of your official duties.
- The Additional Mileage Principle recognises the saving to you in not travelling to or from the base and reduces the amount that can be claimed accordingly whilst ensuring that you are fully compensated for any additional mileage undertaken in connection with your official duties.

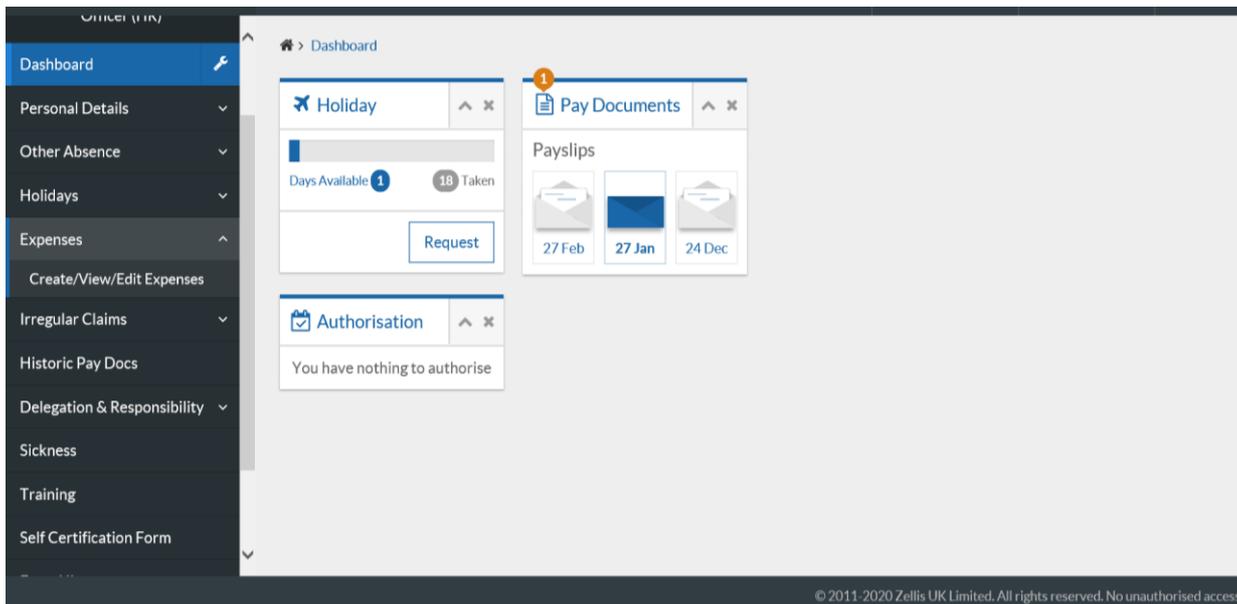
The Expenses Module enables staff to submit their Business Mileage and Expense Claims (reimbursement of money whilst fulfilling your role). Copies of previously submitted and approved claims entered through the Self Service Module can also be viewed in My Forms.

Before you make a claim please check the guidance and its examples for claiming expenses on the intranet. A link to the guidance and travel policy is provided below.

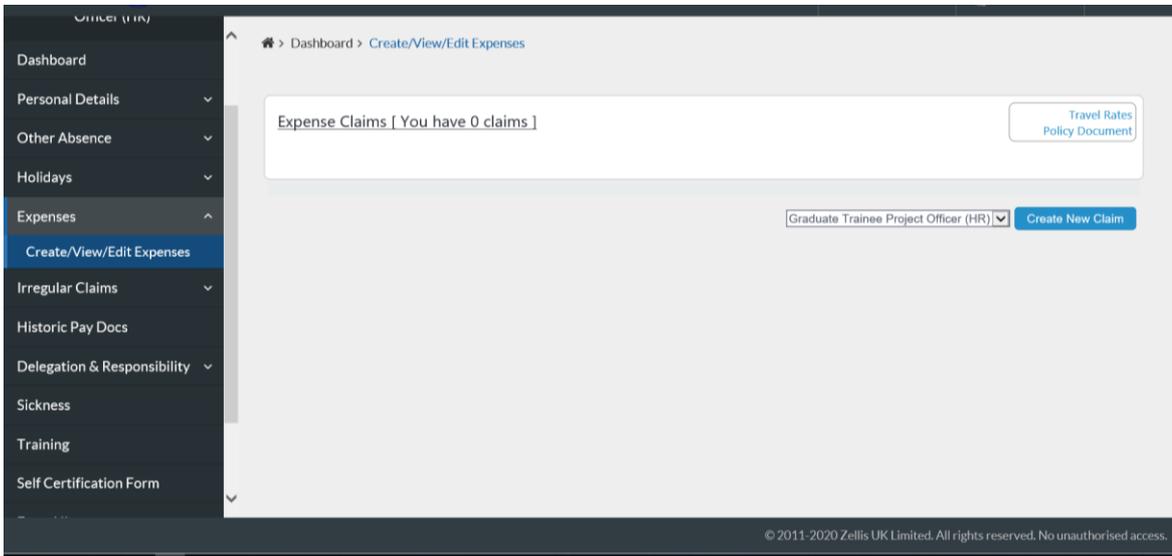
<http://intranet/our-people/hr/pay-benefits/expenses/>

Creating a New Claim Form

To create a claim, click on **Expenses** on the left of the Dashboard then **Create/View Expenses**:



Any Open, Submitted or Authorised Claims will be displayed on screen, there are also links to an Online Guidance Document and the Current Travelling Rates in the top right hand corner of the screen.



To open a new claim, select the appropriate post from the drop down menu and then click on the Create New Claim button at the bottom of the screen, which will open a blank claim form:

Travelling Expenses

Please note: this page needs to be regularly saved as it will time out after 30 minutes.

Employee Expenses

I certify that:

- Mileages claimed have been necessarily incurred solely in connection with County Council business.
- Where subsistence expenses are claimed, additional expenditure has been incurred above normal outlay and represents actual expenditure.
- The vehicle used in respect of this claim meets all legal requirements in respect of roadworthiness.
- The vehicle is covered by the appropriate level of insurance which permits business use. The vehicle has a valid MoT certificate. The vehicle has valid road fund licence.
- I have a valid driving licence that legally permits me to drive the vehicle in respect of this claim.
- I understand that by falsifying any information provided in respect of the claim, it may subject me to the Council's disciplinary procedures.

Please Note
If claims are being made in respect of relocation expenses then the 'Taxable Mileage' box needs to be ticked

Position Graduate Trainee Project Officer (HR)
Description

Travelling Expenses [help]

Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
<input type="text"/>	<input type="text"/>	<input type="text"/>	--Select--	--Select--	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

No. of Passengers
Non-Standard Journey
Override Cost Centre

Expenses

Date	Start Time	End Time	Value
--Select--			

The **Description** field should be completed with the period of the claim e.g. September 2016, 01/09/2016 or a Date Range 01 – 30 September 2016. This will make the claim easily identifiable to both you and your manager if there are any queries to be addressed.

In the **Travelling Expenses** section of the claim form each individual **Journey** must be completed with:

- **Date** – the start date of the Journey, you can enter the date directly into the field in the format **ddmmyyyy** or you can click on the calendar button next to the field and select the appropriate date.
- **Start Time & End Time** fields are **mandatory** and must be completed in the 24 hour format **hhmm** e.g. Start 0845 End 1645. The system will automatically populate a colon between the hours and minutes for you.
- A generic **Vehicle** will automatically be populated with the users default vehicle e.g. C1450, C1199 etc.

Note: If this field is blank please email the ResourceLink inbox requesting your vehicle details to be added, please include your employee number in this email.

Lease Car holders will have the actual Car Registration recorded.

- **Standard Journey** :You choose standard journey if you are claiming for a predefined journey which has been set up between the main Administrative Offices. These journeys have been created with a set mileage (AA rates). **Click** on the drop down arrow on the right hand side of the field and **scroll** through the list to select the appropriate journey. Once a journey is selected **the Mileage field** will be automatically populated with the appropriate number of miles (this is the return journey mileage).

Note: When you use the Standard Journey option you must give the reason for your journey in the Nonstandard Journey field.

- **Mileage** can be completed with the actual number of miles being claimed for a non-standard journey.
- **Taxable Mileage** should only be ticked if the mileage claimed is taxable i.e. relocation expenses only.
- **VAT receipt** should be ticked to confirm that receipt is available for the fuel purchased to cover the travel period.
- **Non-Standard Journey** is a **mandatory** field and must be completed when claiming both **Non-Standard** and **Standard Journeys**. When you select a Non-Standard Journey the field must be completed with the reason the journey was undertaken and the routes taken.
- **Override Cost Centre** can be left blank it will automatically pick up the costcode attached to your post. If the journey you are claiming for is to be charged to another cost code other than the one attached to your post e.g. journeys claimed which are subject to grant claims, coronavirus etc. You will need to enter the appropriate costcode for the work you carried out.

Note: Cost Codes are either 11 or 17 digits in length. If you are unsure about the costcode please ask your line manager or the manager of the costcode you need to use.

Dashboard > Create/View/Edit Expenses

e) I have a valid driving licence that legally permits me to drive the vehicle in respect of this claim.
 f) I understand that by falsifying any information provided in respect of the claim, it may subject me to the Council's disciplinary procedures.
Please Note
 If claims are being made in respect of relocation expenses then the 'Taxable Mileage' box needs to be ticked

Position Graduate Trainee Project Officer (HR)
 Description

Travelling Expenses [help]

Journey		Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt	
<input type="text" value="14/02/2020"/>	<input type="text" value="11:45"/>	<input type="text" value="12:40"/>	<input type="text" value="C1450"/>	<input type="text" value="--Select--"/>	<input type="text" value="36"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>
No. of Passengers	Non-Standard Journey	Override Cost Centre								
<input type="text"/>	<input type="text" value="aesllewellyn (return trip)"/>	<input type="text"/>		<input type="button" value="Search"/>						

Expenses

--Select--	Date	Start Time	End Time	Value
GRAND TOTAL				
				0.00
Total for Travelling Expenses				0 Miles

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If additional journeys are to be entered then the user should click on the **[+]** button at the right hand side of the journey row to open an additional line.

Do not copy and paste details into the Non-Standard Journey field, this function can add special characters to this field which will prevent your expenses from being submitted.

To delete a row the user should click on the **[-]** button to the right of the row to be deleted.

Dashboard > Create/View/Edit Expenses

Welcome, EMMA Account ▾ Sign Out

If claims are being made in respect of relocation expenses then the 'Taxable Mileage' box needs to be ticked

Position Graduate Trainee Project Officer (HR)
 Description

Travelling Expenses [help]

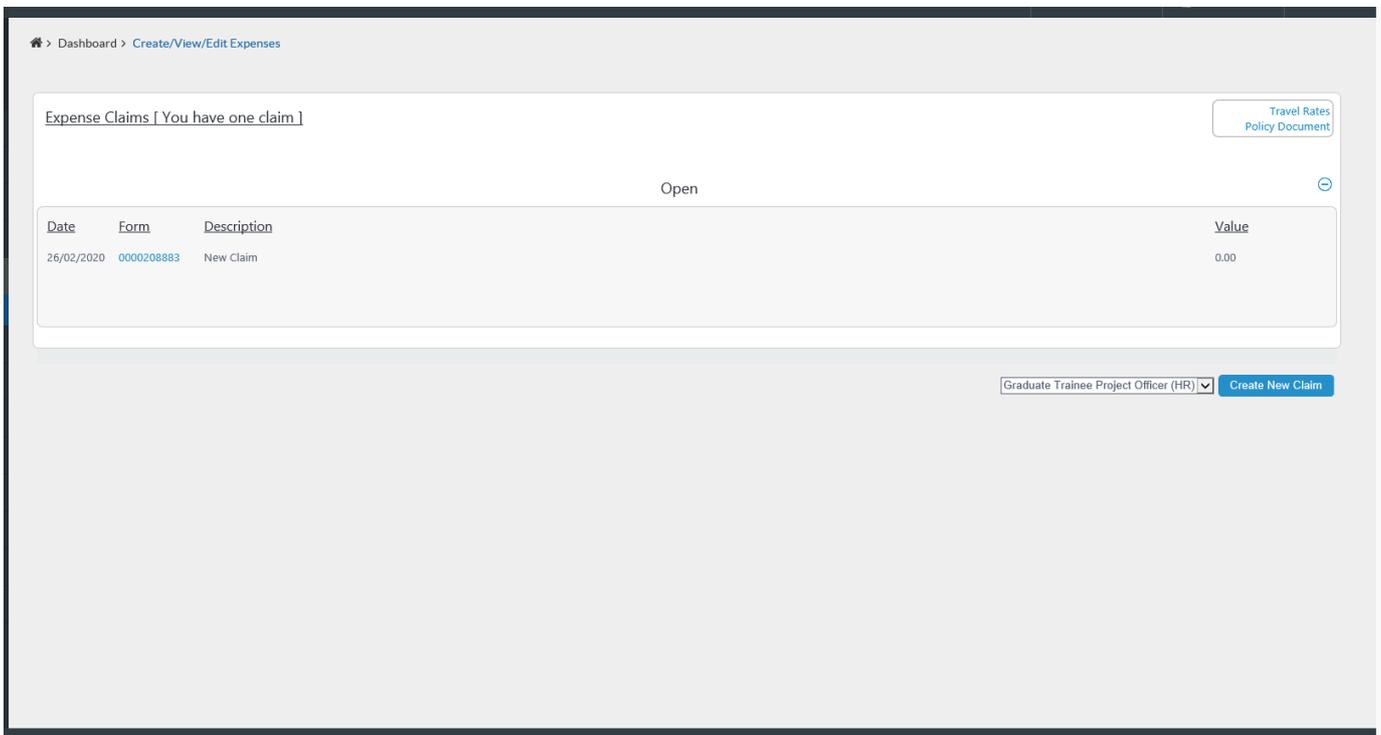
Journey		Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt	
<input type="text" value="14/02/2020"/>	<input type="text" value="11:45"/>	<input type="text" value="12:40"/>	<input type="text" value="C1450"/>	<input type="text" value="--Select--"/>	<input type="text" value="36"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>
No. of Passengers	Non-Standard Journey	Override Cost Centre								
<input type="text"/>	<input type="text" value="ResourceLink Rollout tra"/>	<input type="text"/>		<input type="button" value="Search"/>						
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="--Select--"/>	<input type="text" value="--Select--"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="-"/> <input type="button" value="+"/>
No. of Passengers	Non-Standard Journey	Override Cost Centre								
<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="button" value="Search"/>						

Expenses

--Select--	Date	Start Time	End Time	Value
GRAND TOTAL				
				0.00

If it is possible that you will be claiming more Expenses during the month then you can click the **Save** button in the bottom right hand corner of the screen. A confirmation message will appear to show your claim has been successfully saved.

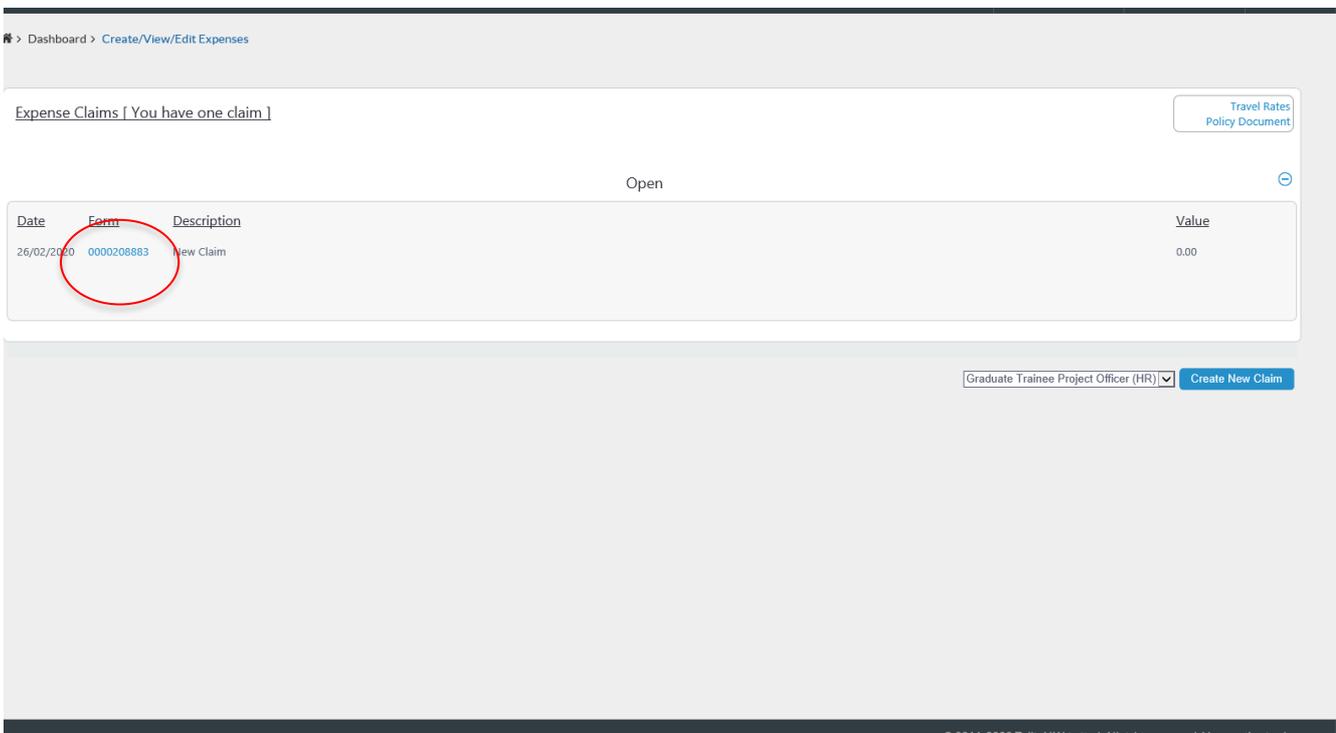
Click continue and you will return to the Create/View/Edit Expense Claims screen where you can create another claim or re-open your saved claims. Your saved claims will be displayed in the section titled **Open**.



Any Open claims will also appear on your Dashboard in the **In Progress** box and in your **Forms History** screen.

To Re-Open a Saved Claim Form

To re-open a claim, you can click on the bold writing in your In Progress box under the sub heading Expenses on your Dashboard or you can access your Claim Forms from the left hand menu and click on the **bold blue form number**. Or, you can go to your **Form History** in the left hand menu and click on the **blue underlined** writing against the claim. An Open claim can have additional items/adjustments made to it prior to submission.



Error messages will highlight any problems within the claim form, in the example below the Non-Standard Journey field has not been completed, therefore the row in error has an error box above and below it.

The screenshot shows a web interface for creating or editing expenses. At the top, there is a navigation bar with 'Welcome, EMMA', 'Account', and 'Sign Out'. Below this, a breadcrumb trail reads 'Dashboard > Create/View/Edit Expenses'. A pink error banner at the top states: 'There are errors in this claim! Please review this claim, correcting any errors. The errors may be caused by an incomplete line or mandatory fields being incorrectly completed. You will not be able to submit this claim unless all errors are removed.' Below the banner, form fields include 'Number' (0000208883), 'Position' (Graduate Trainee Project Officer (HR)), and 'Description' (February 2020). The 'Travelling Expenses' section contains a 'Journey' table with one row. The row has a red error icon and message: 'ERROR! - Incomplete line. This line is incomplete. Please review this line ensuring that you complete all fields.' The fields in this row are: Date (14/02/2020), Start Time (11:45), End Time (12:40), Vehicle (C1450), Journey Type (Non-Standard Journey), Mileage (36), Taxable Mileage receipt (checkbox), and VAT (checkbox). A blue arrow points to the 'Non-Standard Journey' field, which is circled in red. Below the table, there is a 'GRAND TOTAL' row showing a value of 0.00. The footer contains the copyright notice: '© 2011-2020 Zellis UK Limited. All rights reserved. No unauthorised access.'

To remove the errors, complete the appropriate fields and then either click on the **[+]** button to create a new row or click **[Save]**.

Note: Claims which contain errors cannot be submitted.

Please ensure that the dates entered in your claim form are formatted correctly. If they appear incorrectly after you have clicked on the calendar date then the language settings in your browser maybe set to English-US rather than English UK. This must be corrected before submitting your claim form for processing. Please contact either the IT Helpdesk or ResourceLink Team for further guidance on how to correct this issue.

Expenses Section

The Expenses Section allows you to claim for the allowable expenses in the drop down menu. Click on the expense to be claimed:

It claims are being made in respect of relocation expenses then the 'Taxable Mileage' box needs to be ticked

Number 0000208883
Position Graduate Trainee Project Officer (HR)
Description February 2020

Travelling Expenses [help]

Journey

Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
14/02/2020	11:45	12:40	C1450	-Select-	36	<input type="checkbox"/>	<input type="checkbox"/>

No. of Passengers
Non-Standard Journey [Resource Link Rollout](#)
Override Cost Centre

Search

Expenses

Date	Start Time	End Time	Value
-Select-			
Breakfast			
Lunch			
Tea			
Evening Meal			
Bridge Tolls			
Telephone Rental			
Telephone Calls			0.00
Fuel Element			
Miscellaneous Expenses			36 Miles
Professional Fees			
Fares etc			
Postages			
In County Lunch			
Overnight Allowance o/s London			
Overnight Allowance London			
Car Parking Fees			
DBS Subscription			
Purchases Reimbursement			
Purchases Reimbursement (No Vat)			

Back Reset Save Submit

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The following fields are **mandatory** and must be completed in order for your claim to be submitted:

- **Date** should be completed with the start date for the expense. You can either enter the date directly into the field in the format **ddmmyyyy** or click on the calendar button below the date field to select the appropriate date.
- **Start Time** and **End Time** fields should be completed with the appropriate times in the format **hhmm** and 24 hour clock.

Note: When the item claimed is not date driven then the Start Time should be completed with 00:00 and the End Time completed with 00:01 e.g. postages

- **Value** must be completed with the amount being claimed for the expense item
Note: A decimal point must be entered between the pounds and pence.
- **Receipt** should be completed with a **Y** for certain expense claims e.g. Car Parking, Bridge Tolls, Taxi, Bus & Train Fares, Telephone Rental and Calls, Overnight Stays. A copy of the receipt must be submitted to the authorising officer once the claim is submitted.
- **Description** should be completed with the purpose/reason for the claim

Expenses

	Date	Start Time	End Time	Value	Receipt	Override Cost Centre
Car Parking Fees	01/09/2016	10:00	12:00	1.60	y	
Description: Car Park Charges whilst attending Training Session						

To add more than one expense item to the claim click on the expense drop down to select the additional item.

Overnight Stays: in order to simplify claims for overnight stays only one entry is required for each stay e.g. an officer attends a conference in London over three days. The Start Date should be completed with the first date of the conference and a detailed description then entered into the Description field e.g.

Expenses

	Date	Start Time	End Time	Value	Receipt	Override Cost Centre
Overnight Allowance London	19/09/2016	13:00	19:30	184.51	y	
Description: Tax Conference 20-21st Sept x 2 Overnight stays + tea. R/turned 21st Sept						

Submission of Claim for Payment

Once all items have been added to the claim and you have checked everything is correct, **click** on the **[Submit]** button in the bottom right hand corner of the screen.

Click OK to proceed to send the claim to the designated Authorising Officer

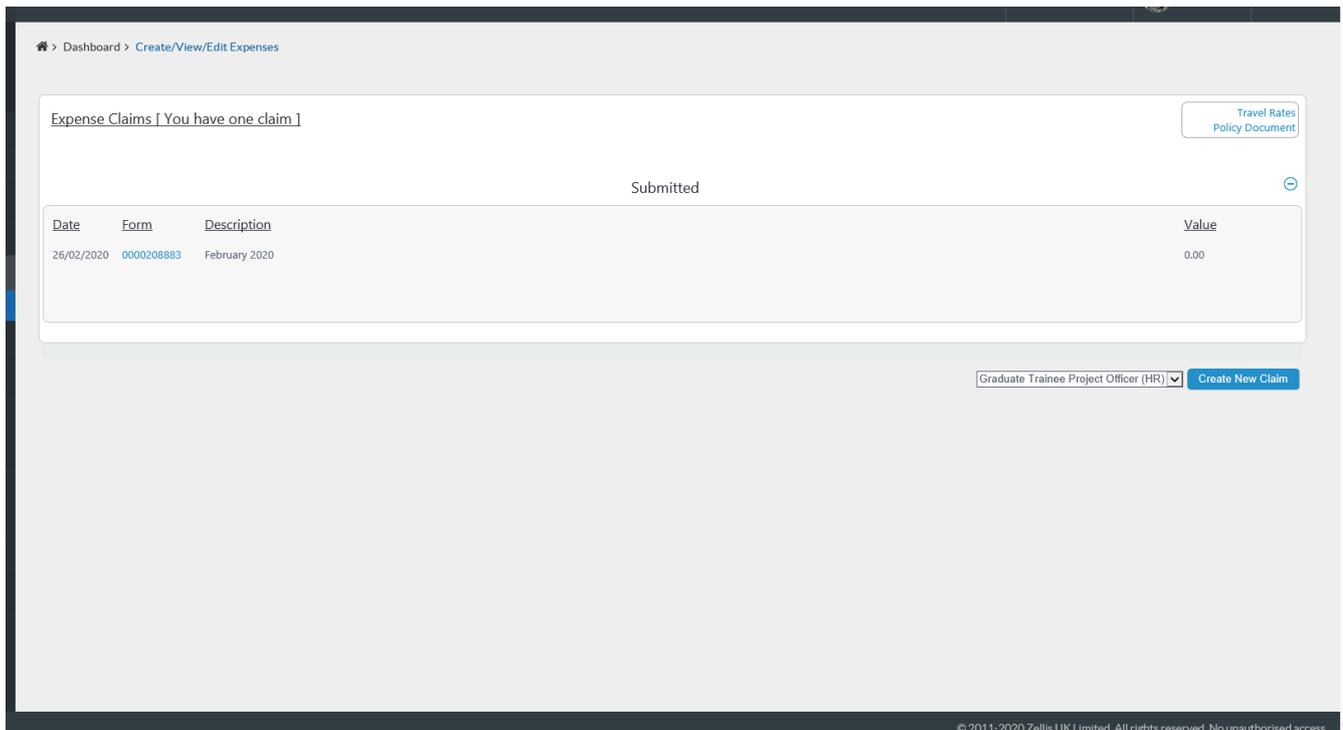
The screenshot shows the 'Create/View/Edit Expenses' form. At the top, it states: 'If claims are being made in respect of relocation expenses then the 'Taxable Mileage' box needs to be ticked'. The form fields include: Number (0000208883), Position (Graduate Trainee Project Officer (HR)), and Description (February 2020). The 'Travelling Expenses' section has a 'Journey' table with columns for Date, Start Time, End Time, Vehicle, Standard Journey, Mileage, Taxable Mileage, and VAT receipt. A single journey is listed for 14/02/2020, starting at 11:45 and ending at 12:40, with 36 miles. Below the journey table is an 'Expenses' table with columns for Date, Start Time, End Time, and Value. At the bottom, the 'GRAND TOTAL' is 0.00 and the 'Total for Travelling Expenses' is 36 Miles. A confirmation dialog box is open in the center, asking 'Are you sure you want to submit this claim for processing?' with 'OK' and 'Cancel' buttons. The bottom right of the form has 'Back', 'Reset', 'Save', and 'Submit' buttons.

Note: The Expense Claim Summary Report is displayed on screen and must be printed in order to attach all relevant receipts, including fuel VAT receipts to pass onto the Authorising Officer.

Click **Print** in the bottom right of the screen, **check** you have printed the sheet successfully, then **select Continue**.

The screenshot shows the 'Expense Claims Claim Form Summary' report. It includes the following details: Employee Number (0011237), Employee Name (EMMA HUGHES), Claim Number (0000208883), and Claim Date (26/02/2020). The report is for a 'MILEAGE SUMMARY' claim for the following: Date (14/02/2020) with 36 miles, and a 'Non-Standard Journey' (Resource Link Rollout journey from St Davids to Maesllewelyn round trip) with 36 miles. The 'TOTAL MILEAGE' is 36. At the bottom right, there are 'Print' and 'Continue' buttons. The top right of the page shows 'Welcome, EMMA', 'Account', and 'Sign Out'.

The Expense Claim now appears in the Submitted Section on the Expense Claims screen.



The screenshot shows the 'Expense Claims' screen with a 'Submitted' section. The table below contains one claim entry:

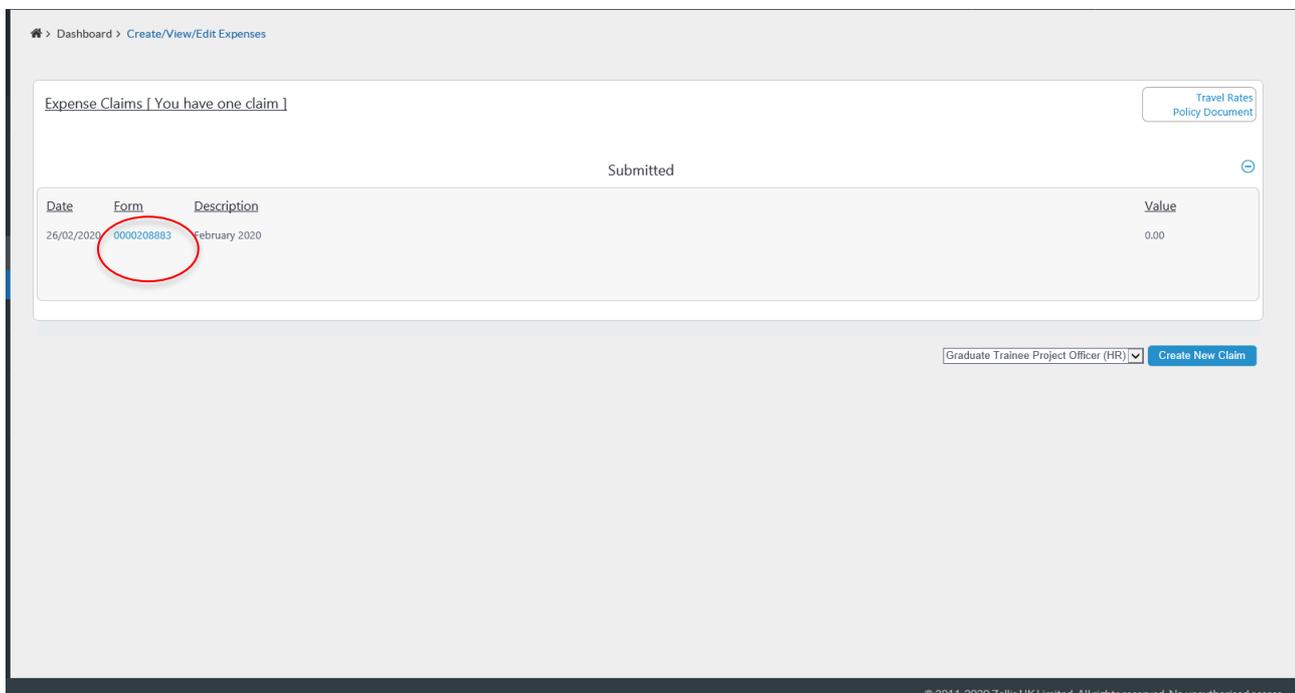
Date	Form	Description	Value
26/02/2020	0000208883	February 2020	0.00

At the bottom right, there is a dropdown menu set to 'Graduate Trainee Project Officer (HR)' and a 'Create New Claim' button.

Withdrawing Submitted Claims

If you submit a claim in error then it can be **Withdrawn** prior to Authorisation:

Click on the **Form Number** of the claim to be withdrawn in the Submitted Section, or the [blue underlined](#) writing in your **Form History** screen to view the claim.



This screenshot is identical to the previous one, but the form number '0000208883' in the table is circled in red to highlight it.

Click on [**Withdraw**] in the bottom right hand corner of the screen.

Dashboard > Create/View/Edit Expenses

Please note
If claims are being made in respect of relocation expenses then the 'Taxable Mileage' box needs to be ticked

Number 0000208883
Position Graduate Trainee Project Officer (HR)
Description February 2020

Travelling Expenses [\[help \]](#)

Journey	Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
	14/02/2020	11:45	12:40	C1450	<input type="checkbox"/>	36	<input type="checkbox"/>	<input type="checkbox"/>
	No. of Passengers	Non-Standard Journey		Override Cost Centre				
	<input type="text"/>	Resource Link Rollout job		<input type="text"/>				

Expenses

	Date	Start Time	End Time	Value
<input type="text"/>				

GRAND TOTAL 0.00

Total for Travelling Expenses 36 Miles

Back Show Summary **Withdraw**

Dashboard > Create/View/Edit Expenses

Please note
If claims are being made in respect of relocation expenses then the 'Taxable Mileage' box needs to be ticked

Number 0000208883
Position Graduate Trainee Project Officer (HR)
Description February 2020

Travelling Expenses [\[help \]](#)

Journey	Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
	14/02/2020	11:45			<input type="checkbox"/>	36	<input type="checkbox"/>	<input type="checkbox"/>
	No. of Passengers	Non-Standard Journey		Cost Centre				
	<input type="text"/>	Resource Link Rollout job		<input type="text"/>				

Expenses

	Date	Start Time	End Time	Value
<input type="text"/>				

GRAND TOTAL 0.00

Total for Travelling Expenses 36 Miles

Back Show Summary Withdraw

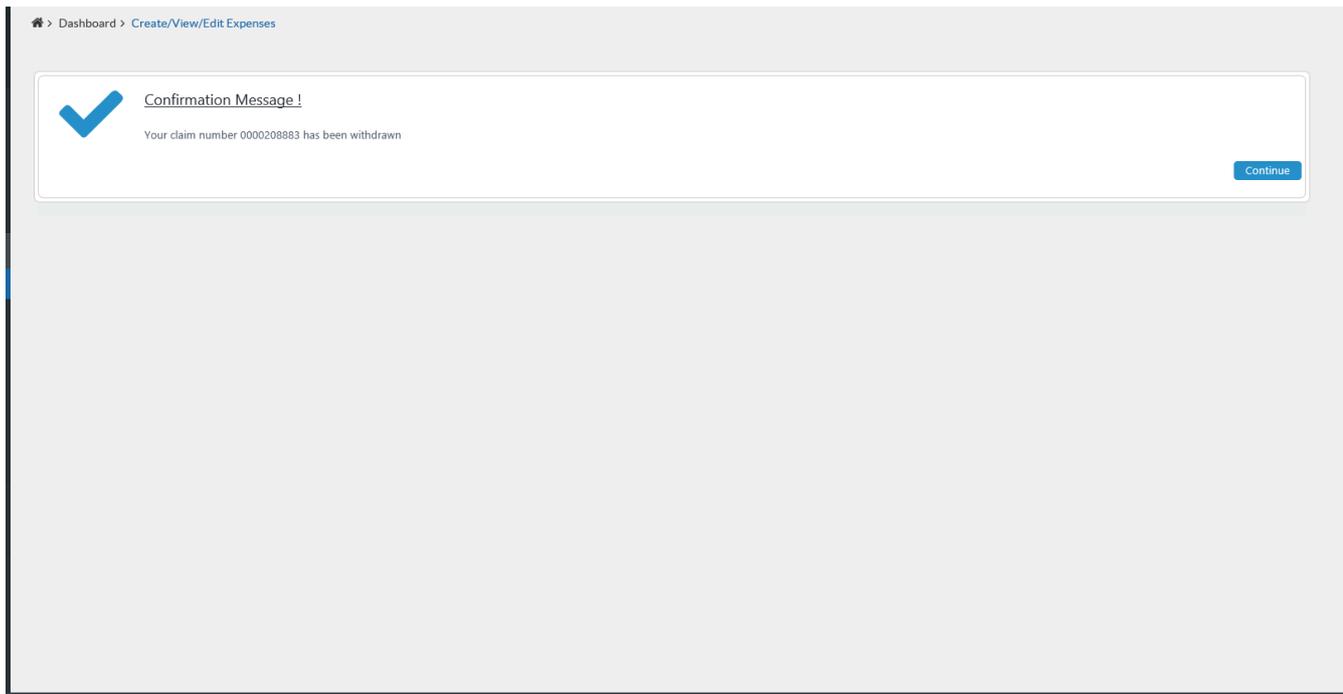
Message from webpage

Are you sure you want to withdraw this claim from processing?

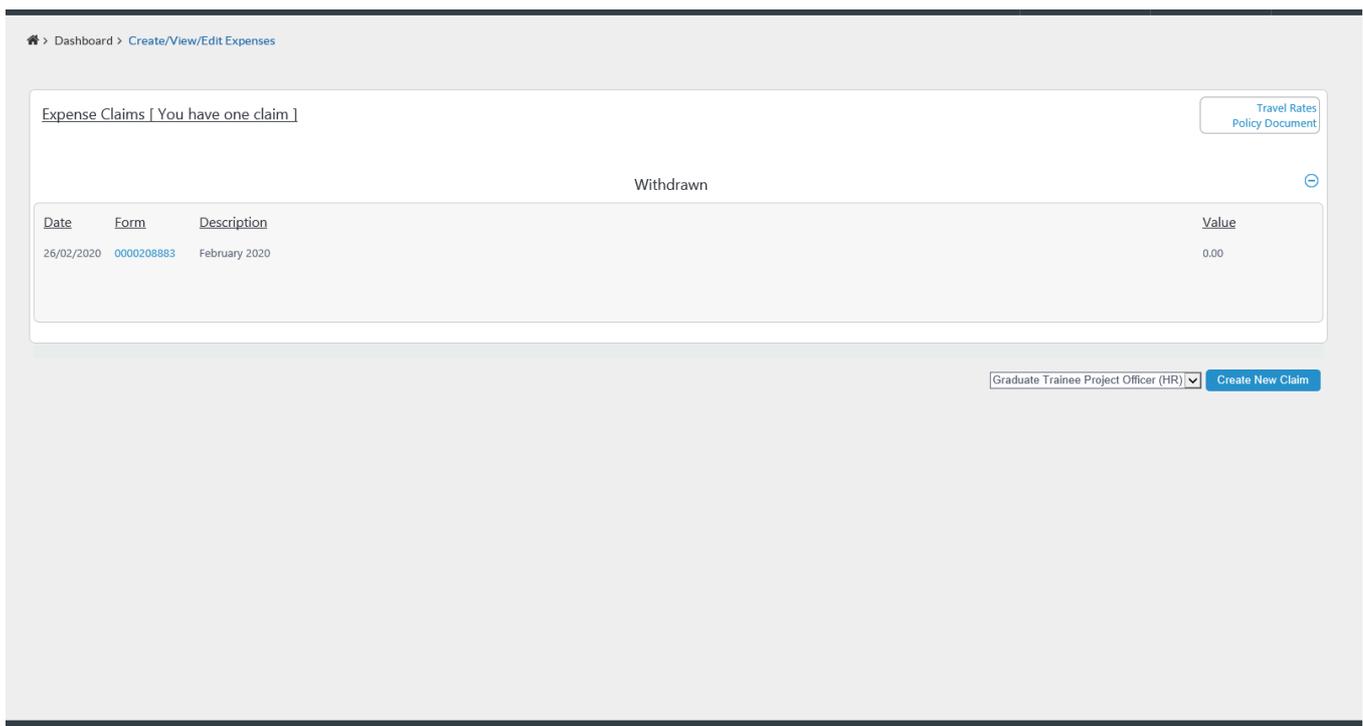
OK Cancel

Click **OK**

You will then receive a confirmation screen confirming withdrawal of the claim.



The Withdrawn claim is then displayed in the **Withdrawn** Section of the Expense Claim screen:



To make adjustments to this claim, click on **the bold blue** form number or the blue underlined writing in the **Form History** screen, then click **Re-Open** in the bottom right hand corner of the screen.

Dashboard > Create/View/Edit Expenses

Please note
If claims are being made in respect of relocation expenses then the 'Taxable Mileage' box needs to be ticked

Number 0000208883
Position Graduate Trainee Project Officer (HR)
Description February 2020

Travelling Expenses [help]

Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
14/02/2020	11:45	12:40	C1450	<input type="checkbox"/>	36	<input type="checkbox"/>	<input type="checkbox"/>
No. of Passengers		Non-Standard Journey		Override Cost Centre			
<input type="text"/>		Resource Link Rollout job		<input type="text"/>			

Expenses

Date	Start Time	End Time	Value
<input type="text"/>			

GRAND TOTAL 0.00

Total for Travelling Expenses 36 Miles

Back Re-open

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The Claim Form will then be moved back to the Open Section/In Progress box on your dashboard where it can be opened and any necessary adjustments made prior to submitting it again.

Should you need further assistance, please contact us at resourcelink@carmarthenshire.gov.uk