# MyView Dashboard Guidance

## **Expenses User Guide**

**Reviewed March 2021** 

carmarthenshire.gov.wales



### Contents

Expenses Module	3
Creating a New Claim Form	3
Travelling Expenses	4
To Re-Open a Saved Claim Form	10
Expenses Section	
Submission of Claim for Payment	
Withdrawing Submitted Claims	15

#### **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/

Expenses:	, <b>.</b>				
	E			Employee Search	ە 🕲 ?
Graduate Trainee Project Officer (HR)	Welcome EMMA				/ Edit dashboard
Dashboard	Holiday :	2 In Progress	Reporting Services	i Absence	i i
Personal Details  V Other Absence  V		1 Expense Claims	Authorisation	Reporting Services	1
Holidays V	15 Days Available 18 Days Taken	1 Relationship Details		Reporting Services	1
Expenses 🗸		3 Pay Documents			
Irregular Claims	Request	Paysips			
Delegation & Responsibility	My Pay :				
Historic Pay Documents v Sciciness Training Profile Vieb Timesheets Jobs & Careers Form History Documentation RRS	Ver Al Pay Doconsets Paysips 28 Feb 19 Unopened Docs	24 Feb 27 Jan 24 Orc			
Sick Self Certification Form (					
Onboarding					
Onboard Docs My Forms					

#### Creating a New Claim Form

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

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:

	Ξ	Employee Search	م ؟ 🍙 ڻ
Graduate Trainee Project Officer (HR)	Q / Databased / Create/Vew/Edl Eponnes		
Dashboard Personal Details	Expense Claims [ You have 3 claims ]		
Other Absence V Holidays V	Open		^
Expenses ^ Create/View/Edit Expenses	Date         Form         Description           01/03/2021         0000227315         postage test		Value 6.50
rregular Claims 🗸 🗸 Authorisations Delegation & Responsibility	Submitted		^
Historic Pay Documents V	Date         Form         Description           03/03/2021         0000225554         TST please ignore and decline		0.01
Training Profile Neb Timesheets	Authorised		^
Jobs & Careers Form History Documentation	Date         Form         Description           26/02/2020         0000208883         February 2020		Value 0.00
RRS Sick Self Certification Form (		Graduate Tra	Inee Project Officer (HR) V
Onboarding Onboard Docs Wy Forms			

#### **Travelling Expenses**

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

					Emp	loyee Search	? 🏮
ashboard / Create/Vew/Edit Expenses							
nployee Expenses							
Renze Policy Document robat ges claimed have been necessarily incurred solely in connection wild re substance expenses are claimed, additional expenditure has bee which is sourced by the appropriate leaf of insurance which permit as valid driving licence that legal permits me to drive the vehicle surand that by helping are photometation movied in respect of the loage are being made in respect of relocation expenses than the Taxable	n incurred above normal outlay an spect of roadworthiness. Is business use. The vehicle has a va respect of this claim. claim, it may subject me to the Cour	lid MoT certificate. The vehicle has v	alid road fund licence.				
Son Graduate Trainee Project Officer (HR) rigition [] New Claim							
avelling Expenses				[ <u>help</u> ]			
rney							
Start Time	End Time	Vehicle	Standard Journey		Mileage	Taxable Mileage	
8		Select	<ul> <li>Select-</li> </ul>	~			•
of Passengers Non-Standard Journey		Override Cost Centre					
			Search				
penses							
Date	Start Time	End Time	Value				

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** <u>must</u> 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 hh:mm 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 user's default vehicle e.g., <u>C1450</u>, <u>C1199</u> 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. <u>Lease Car</u> 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 dropdown 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.

							Employee Search	Q	2 🔘 O
Please Note	formation provided in respect of the claim, it may su relocation expenses then the 'Taxable Mileage' box r		disciplinary precedures.						
Position Graduate Trainee Proje Description February 2021	ect Officer (HR)								
Travelling Expenses					[ <u>help</u> ]				
Journey Date	Start Time	End Time	Vehicle		Standard Journey	Mile	age Taxable Mileage	VAT receipt	
01/02/2021	09:30	10:45	C1450	V	Select V				•
No. of Passengers	Non-Standard Journey		Override Cost Centre		Select Ammanford Library to Llandeilo Library				
		)			Ammanford Library to Llandovery Library Ammanford Library to Pontyberem Library				
					Ammanford Library to Brynamman Library Ammanford Library to Bedol Library				
					Ammanford Library to Carmarthen Library Ammanford Library to Llanelli Library				
Expenses					Amman Valley Lesiure Centre to Llandovery Leisure Centre Amman Valley Lesiure Centre to Newcastle Emlyn Leisure Centre				
	Date Sta	art Time	End Time	Value	Amman Valley Lesiure Centre to St. Clears Leisure Centre Amman Valley Lesiure Centre to Parc Myrddin, Carmarthen				
Select	~				Amman Valley Lesiure Centre to Bro Myrddin Indoor Bowls Amman Valley Lesiure Centre to Llanelli Leisure Centre				
					Amman Valley Lesiure Centre to Carmarthen Leisure Centre Amman Valley Lesiure Centre to Parc Y Scarlets				
					Amman Valley Lesiure Centre to Town Hall/Ty Elwyn, Llanelli Beacon to Town Hall/Ty Elwyn, Llanelli Beacon to County Hall/Spilman St, Carmarthen				
					Beacon to Nantyci, Carmarthen	_			
GRAND TOTAL						0.00			
Total for Travelling Expenses						0 Miles			

∎ entity		an and the second second second					Employee Search	٩	? 👜 ଓ
) I understand that by falaifying any information provided in respect of the claim, it may si lease Note f claims are being made in respect of relocation expenses then the Taxable Mileage' box:		disciplinary precedures.							
Toenns are vering made in respect of revolution expenses then the Taxable inneage too.	needs to be troked								
Position Graduate Trainee Project Officer (HR)									
Description February 2021									
Travelling Expenses					[ <u>help</u> ]				
Journey									
Date Start Time	End Time	Vehicle		Standard Journey	_	Milez	rge Taxable Mileage	VAT receipt	_
01/02/2021	10:45	C1450 Override Cost Centre	~	Ammanford Library to Llandovery Library	·	40	0		•
No. of Passengers Non-standard journey	ן	Gvernde Cost Centre		Search					
	, ,								
Expenses									
Date St.	art Time	End Time	Value						
-Select									
GRAND TOTAL						0.00			
Total for Traveling Expenses						0 Miles			
। २ स 💁 🛤 🐖 🗿 🛤 🍓 😇 💽	00 🚯 👂					o miles			16:23 04/03/2

- **Mileage** can be completed with the actual number of miles being claimed for a nonstandard 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 cost code 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 cost code for the work you carried out.

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

				Employee Search	ද ? 👜 එ
f) I understand that by faisifying any information provided in respect of the claim, it may subject me to the C Please Note If claims are being made in respect of relocation expenses then the Taxable Mileage' box needs to be ticket					
Position Graduate Trainee Project Officer (HR) Description February 2021					
Travelling Expenses			[ <u>help</u> ]		
Journey					
Date Start Time End Time	Vehicle	Standard Journey	_	Mileage Taxable Mileage	VAT receipt
01/02/2021	C1450 ~	-Select V	]	50	
No. of Passengers Non-Standard Journey	Override Cost Centre				
Carmarthen to Cardiff RL training session full da		Search			
Expenses					
Date Start Time	End Time Value				
Select V					
GRAND TOTAL			0.00		
Total for Travelling Expenses			0 Miles		

								Employee Search		? 👩
Note	nformation provided in respect of the claim, it may su relocation expenses then the 'Taxable Mileage' box n		disciplinary precedures.							
sition Graduate Trainee Proj	ject Officer (HR)									
February 2021										
avelling Expenses						[ <u>heip</u> ]				
urney										
te	Start Time	End Time	Vehicle		Standard Journey		Mile	age Taxable Mileage	VAT receipt	
1/02/2021	09:30	10:45	C1450	Ŷ	Select	~	50		•	•
. of Passengers	Non-Standard Journey		Override Cost Centre							
	Carmarthen to Cardiff RL training session full $d\epsilon$				Search					
penses									/	
	Date Sta	art Time	End Time	Value						
elect	~									
ND TOTAL							0.00			
al for Travelling Expenses							0 Miles	/		

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 and 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.

			Employee Search Q ? 🍘 🖒
Q / Dashboard / Create/Vew/Edit Expenses			
Employee Expenses			
Travel Rates ( boldy Document) Centry hot: (B)Regard Centre Rate bare here necessarily you'red solely in connection with Courty Court (B)Regard Centre Rate bare been necessarily or context and the court of the Court (B) hot and the court of the court of the court of the court of the court (B) have and a court of the court (B) have and d driving (cource the lagely) permits in the cite of the court of the court of the court (B) have and a court of the	ove normal outlay and represents actual expenditure. workliness. . The vehicle has a valid MoT certificate. The vehicle has valid road fund licer (dam. Joject me to the Council's disciplinary precedures.	a	
Position Graduate Trainee Project Officer (HR) Description February 2021			
Travelling Expenses		[help]	
Journey Date Start Time	End Time Vehicle	Standard Journey	Mileage Taxable VAT Mileage receipt
01/02/2021	10:45 C1450	∨ Select ∨	
No. of Passengers Non-Standard Journey	Override Cost Centre		
Carmarthen to Cardiff RL training session full day	9	Search	
Journey			
Date Start Time	End Time Vehicle	Standard Journey	Mileage Taxable VAT Mileage reveipt
<b>B</b>	-Select V	Select	
No. of Passengers Non-Standard Journey	Override Cost Centre		

								Employee Search	4	? 慮
ravelling Expenses					[ <u>help</u> ]					
urney										
ate	Start Time	End Time	Vehicle	Standard Journey			Milea	ge		VAT receipt
01/02/2021	09:30	10:45	C1450	~ -Select	~		50		0	Ø .
o. of Passengers	Non-Standard Journey		Override Cost Centre						·	
	Carmarthen to Cardiff RL training session full day			Search						
urney										
ite	Start Time	End Time	Vehicle	Standard Journey			Mileage	Taxable Mileage		
8			-Select v	Select	~					- +
o. of Passengers	Non-Standard Journey		Override Cost Centre				L			
		1		Search						
penses										
xpenses	Date Star	Time	End Time Value							
xpenses -Select	Date Star	t Time	End Time Value							
		: Time	End Time Value							
		: Time	End Time Value							
-Select		: Time	End Time Value							
		Time	End Time Value			0.00				
Select-		L Time	End Time Value							
-Select		: Time	End Time Value			0.00 50 Miles				
Select-		Time	End Time Value							
Select-		Time	End Time Value					Submit	we Re	set Back
Select ND TOTAL		Time	End Time Value					Submit S	wc Res	set Bock
Select ND TOTAL I for Travelling Expenses			End Time Value					Submit S	vyc Re	set Back

A screenshot to illustrate the written explanation.

If you are likely to incur 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 and you will be automatically taken back to the expenses main screen.

);	ur People Eng	n UWTSD Moodle 20	MY VIEW	Z ZELLIS Login - Cust	O Convert text to HT	😡 WAG Benchmarkin	Elearning Account	MiCollab-for-PC-Cli	🕄 Settings	Welcome - MyView		📋 Other favo	urite
											Employee Search	? 👩 ୯	
	ග / Dashboard	/ Create/View/Edit Expenses											
													-
	$\sim$	firmation Message ! Ir claim has been saved as clai	m number 000022	7587									
												Continue	

Your saved claims will be displayed in the section titled **Open**.

		E	Employee Search	٩	? 👜 O
^ F1	Graduate Trainee Project Officer (HR)	0 / <u>Switzer</u> / Gauss/Ameliit Equense			
đ	Dashboard Personal Details V	Expense Claims [ You have 4 claims ]			
	Other Absence V Holidays V	Open			^
	Expenses ^ Create/WextEdExpenses Imegular Claims >	Date         Ferning         Description           64403021 <u>000027287</u> Ferning V201           01002022 <u>000027297</u> Ferning Hert			Value 0.00 6.50
	Authorisations Delegation & Responsibility	Submitted			^
	Historic Pay Documents V Sickness Training Profile	Date         Fermi         Description           63/05/2021         000023354         TEXT passe ignore and decline			0.01
	Web Timesheets Jobs & Careers	Authorised			^
0%	Form History Documentation	Date         Ferm         Description           36/02/2020         000000883         Fervary 2020			0.00
	RRS Sick Self Certification Form ( Orthoard Dass My Forms		Graduete Train	_	Officer (HR) V

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 **underlined** form number. Or you can go to your Form History in the left-hand menu and click on the **underlined** writing against the claim. An Open claim can have additional items/adjustments made to it prior to submission.

		Employee Search	٩	? 🙆 O
Graduate Trainee Project Officer (HR)	Q / <u>Dashbard</u> / Cessis Veen Edit Expanses			
Dashboard	Expense Claims [ You have 4 claims ]			
Personal Details $\sim$	Travel Rate: Policy Document			
Other Absence V Holidays V	Open			^
Expenses 🔿	Date Form Description			Value
Create/View/Edit Expenses	04/03/2021 0000227587 February 2021 01/05/2021 0000227515 postage test			0.00 6.50
Authorisations				
Delegation & Responsibility Historic Pay Documents ~	Submitted			^
Sickness	Date Form Description			Value
Training Profile	03/03/02021 0000225554 TEST please ignore and decline			0.01
Web Timesheets Jobs & Careers	Authorised			^
Form History	Date Form Description			Value
Documentation	26/02/2020 0000208883 February 2020			0.00
RRS				
Sick Self Certification Form (		Graduate Train	nee Project Off	ficer (HR) $ \lor $
Onboarding			Create N	New Claim
Onboard Docs				
My Forms				

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.

Y		Employee Search	a 7 🙆	0
Craduate Trainee Project Officer (HR)	Q   antered / ConstructionConference			
	Employee Expenses			
ashboard ersonal Details V	Trave Russ dolp Dourners			
ither Absence	Learding rack M Milleger contred have been necessarily incurred solely in connection with County Council business. Withmer subschare expenses are calimed, additional expenditure has been incurred above normal outlay and represents actual expenditure.			
olidays 🗸	G The vertice used in respect of this claim meets all legal requirements in respect of crassivorthines. If The vertice is during the sequence by the sequence with sequence business use. If we vertice has a valid MoT centificate. The vertice has valid read fund licence.			
openses ^	e) I have a valid of hing licence that legally permits me to drive the vehicle in respect of this claim. If I understand that by faitifying any information provided in respect of the claim. It may subject me to the Council's disciplinary precedures. Parene fore			
Create/Vew/Edit Expenses	If claims are being made in respect of relocation expenses then the Tauable Mileger box needs to be stoled			
regular Claims 🗸 🗸	There are entropy to that calmant Preservements by the concepts are entropy and entropy the caused by an incomplete line or mandetory fields being incorrectly completed. You will not be able to subwrit this calm unless all entropy are entropy.			
uthorisations				_
regation & Responsibility				
storic Pay Documents V	Number 0000227587 Position Graduate Trainer (niject Officer (HR)			
ickness raining Profile	Description February 2021			
eb Timesheets				
to & Careers	Travelling Expenses [help]			
ens History	Journey			
cumentation	GEROR-Incomplete Line			
8 Self Certification Form (	This line is incomplete. Please device that line ensuring that you complete all table. Date: Stant Time End Time Vehicle Standard Journey	Mileage	Taxable VAT Mileage receipt	
nboarding	[1:02/2027 [2] (0:30 [1:045 [C:450 ]] [-54965- ]]	50	o 🖸 📕	
iboard Docs	Nis. of Passengers Non-Standard Journey Override Cost Centre			
y Forms				
	Expenses			
	Date Start Time End Time Value			

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:

		=	Second second second second					Employee Search	۹ ? 🚳	0
^ 121	EMMA Graduate Trainee Project Officer (HR)	Number 0000227587 Position Graduate Trainee Project Officer (HR	0							
	Dashboard	Description February 2021	-							
	Personal Details V									
	Other Absence 🗸									
	Holidays 🗸	Travelling Expenses					[ <u>help</u> ]			
	Expenses ^	-Select-								
	Create/View/Edit Expenses	Breakfast Lunch								
	Irregular Claims 🗸	Tea Evening Meal	uring that you complete all fields.	End Time	Vehicle	Standard Journey		Mileage	Taxable VAT Mileage receipt	
	Authorisations	Bridge Tolls Telephone Rental		10:45	C1450	-Select	~	50		
	Delegation & Responsibility	Telephone Calls Fuel Element	d Journey		Override Cost Centre					-
	Historic Pay Documents V	Miscellaneous Expenses Professional Fees	to Cardiff Training Session RL			Search				
	Sickness	Fares etc Postages								
	Training Profile	In County Lunch Overnight Allowance o/s London								
	Web Timesheets	Overnight Allowance London Car Parking Fees								
	Jobs & Careers	DBS Subscription Purchases Reimbursement	Date Start Ti	-	nd Time Value					
0%	Form History	Purchases Reimbursement (No Vat)			in the value					
	Documentation									
<u>ا</u> و	RRS									
	Sick Self Certification Form (									
	Onboarding	GRAND TOTAL					0.00			
	Onboard Docs									
	My Forms	Total for Travelling Expenses					50 MI	les		
								Submit	ave Reset Back	
										-

The following fields are **mandatory** and must be completed 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 **hh:mm** 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	
unch	01/02/2021	00:00	00:01	5.60	]	У	Search	-
	Description							
	Lunch During Training Ses	ssion						
Select	~							
RAND TOTAL							5.60	
RAND TOTAL							5.60	
RAND TOTAL								
							5.60 50 Miles	
RAND TOTAL coal for Travelling Expenses								
							50 Miles	Save Reset Bac

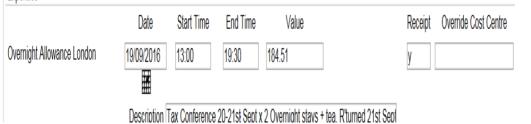
To add more than one expense item to the claim click on the expense drop down to select the additional item.

Expenses								
	Date	Start Time	End Time	Value		Receipt	Override Cost Centre	
Lunch	01/02/2021	00:00	00:01	5.60	]	У	Search -	
Select	Description Lunch During Training Se	ession						
GRAND TOTAL							5.60	
fotal for Travelling Expenses							50 Miles	
							Submit Save Reset	Back

11

**Overnight Stays**: 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 the Description field e.g.

Expenses



#### 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 comer of the screen. **Click OK** to proceed to send the claim to the designated Authorising Officer

Y			Are	you sure you want to submit this claim	n for processing?			Con	phopen Search	Q 7
EMMA Grabuile Trainee Project Officer (HR)	Position Graduate Trainee Project Description February 2021	t Officer (HB)	٦.		OK Cancel					
uard uri Details V	Travelling Expenses					[ <u>heig</u> ]				
ibsence v	journey Dete Sta	Last Time	End Time	Vehicle	Standard Jou	unay		Mieage	Taxable Mileage	VAT
es ^	01-02/2021	09:30 on Standard Journey	10.45	C1450 Override Cast Centre	~ ] [-Select-	~		50		•
r Claims V sations for & Responsibility		Centrarthen to Cardiff Training Session RL			Search					
Pay Documents 🗸 🗸	Expenses									
g Profile mesheets Careers	Lunch	Date Start           01/02/2021         000           Description         000		nd Time Value 00:01 5:60		Beceipt 7	Override Cost Centre	Search		
alory Intation	-Seed-	Lunch During Training Session								
f Centification Form (										
d Docs	GRAND TOTAL						5.60			
-	Total for Traveling Expenses						50 Miles			
									init Seve	Reset Ba

Note: The Expense Claim Summary Report is displayed on screen and <u>must</u> be printed 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**.

				Employee Search		? 👜 🖱 🍈
Δ / <u>Dashboard</u> / Create/WewEdit Expenses						
Expense Claims Claim Form Sur	nmary					
Travel Rates   Policy Document						
	Employee Number	0011237				
	Employee Name	EMMA HUGHES				
	Claim Number	0000227587				
	Claim Date	04/03/2021				
	Claim for the following:					
	EXPENSES SUMMARY					
	All figures in this claim are in Sterling					
	Expenses		5.60			
	TOTAL VALUE OF CLAIM:		5.60			
	MILEAGE SUMMARY					
	Date 01/02/2021 Non-Standard Journey Carmarthen to Cardiff Training Session RL		50			
	TOTAL MILEAGE:		50			
					Continue	Print

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

	E	Employee Search Q, ?
Graduate Trainee Project Officer (HR)	Q / Devised / Development / Development	
ashboard ersonal Details v	Expense Claims [ You have 4 claims ] Treather Pally Document	
idays v	Open	
penses ^	Date         Farm         Description           01/05/2021         0000227215         pointsgrivest	Val 6.5
Intersections	Submitted	
toric Pay Documents V kness ining Profile	Date         Form         Description           04/05/021         00002275827         Retruity 3021           05/05/021         0000225554         TEST pieses grove and decine	Val 5.6 0.0
t Timesheets s & Careers	Authorised	
m History cumentation	Date         Form         Description           26/02/2020         0000008885         February 2020	Va 01
S k Self Certification Form ( boarding board Docs Forms		Graduate Trainee Project Officer Create New
<u>ه</u> الل م	🖬 📲 📲 📲 🍓 😨 💿 🗴 🔮 🛤	

#### 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 <u>underlined</u> writing in your **Form History** screen to view the claim.

		Employee Search	Q ? 🙆
		Ciripoyee Search	<u>ч</u> ( 🛞
Graduate Trainee	© / Destand / ConstVenEdd Dennes		
Graduate Trainee Project Officer (HR)	Expense Claims [ You have 4 claims ]		
Dashboard			
Personal Details V	rize sala folgulacines		
Other Absence V	Open		
folidays 🗸	Upen		
Expenses ^	Date Farm Description		Value
Create/Vew/Edit Expenses	01/05/2021 0000227315 postage test		6.50
egular Claims 🗸			
uthorisations	Submitted		
elegation & Responsibility	Date Form Description		Value
storic Pay Documents V	Lane         Perm         Description           044552021         Permutation         Permutation		5.60
ckness	03/03/021 TEST plasse ignore and decline		0.01
raining Profile			
leb Timesheets	Authorised		
obs & Careers	ANTINETSEE		
orm History	Date Form Description		Value
ocumentation	28/02/020 000000885 Petruey 2020		0.00
RS			
k Self Certification Form (		Graduate Traine	e Project Officer (HR)
boarding			Create New Claim
board Docs			
Forms			
- P 聞 💁	💼 📲 📲 👫 🍇 😋 👧 🐽 🧶 🧸		

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

								Employee Search	۹	? 🔘
Position Graduate Trainee Project	Officer (HR)									
Description February 2021										
Travelling Expenses						,	help]			
Travening Expenses						· ·	neip 1			
Journey										
Date	Start Time		End Time	Vehicle			Standard Journey	Mileage	Taxable Mileage	
01/02/2021	09:30		10:45	C1450		1		50	10	
No. of Passengers	Non-Standard Journey			Override Cost Cen	tre	_			5	
	Carmarthen to Cardiff Train	ning Session RL								
Expenses										
	Date	Start Time	End Time	Value			Receipt Override Cost Cen	tre		
Lunch	01/02/2021	00:00	00:01	5.60			y			
	Description						,			
	Lunch During Training	gSession	]							
GRAND TOTAL							5.60			
Total for Travelling Expenses							50 Miles	$\frown$		
								$\langle \rangle$		
								Withdraw S	now Summar	ry Back
								(-7)		
. 🐖 💵 🗶 📬	i 🖸 💽 🖸	🕹 🔼								0

Description February 2021								
Travelling Expenses					[ <u>help</u> ]			
ourney								
Date	Start Time		End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
01/02/2021	09:30		10:45	C1450		50		
No. of Passengers	Non-Standard Journey			Override Cost Centre				
	Carmarthen to Cardiff Training Se	ession RL						
unch	Date 01/02/2021 Description Lunch During Training Sess	Start Time	End Time	Value 5.60	Receipt Override Cost Ce	entre		
RAND TOTAL					5.60			
SAND TOTAL Rail for Travelling Expanses					5.60 50 Miles			

Click <b>OK.</b> You will then receive a confirmation screen confirming withdrawal of the claim.										
	Employee Search Q ? 🧕	) U								
Q / Dashbarri / Crush-VewEdt Expenses										
Confirmation Message ! Your claim number 0000227587 has been withdrawn										
	Conti	dnue								

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

A screenshot to illustrate the written explanation.

Project Management	: [¹ 0u	Dur People Eng 🧌 UNISD Moodle 20. 🔲 MIY VEW 🛃 ZELUS Lagin - Cust 😮 Convert text to HT 🔾 WAG Benchmarkin 🚼 Elearning Account 🕅 Micolab-Ho-PC-Cil 🛞 Settings 💭 Welcome - MyView		Cther favourites
<b>y</b>		E Dation 5	arch Q	7 🙆 O
EMMA		9 / <u>Dathord</u> / Onite/Her/Edit Domon		
Graduate Trainee Project Officer (HR	, Å	Expanse Claims I Vau have 4 claims 1		
Dashboard		Expense Claims [ You have 4 claims ]		
Personal Details	ř			
Other Absence Holidays	č	Open		^
Expenses	^	Date Form Description		Value
Create/Vew/Edit Expense		01/03/2021 0000227315 postage text		6.50
Irregular Claims	×			
Authorisations Delegation & Responsibility		Submitted		^
Historic Pay Documents	~	Date Form Description		Value
Sickness		03/03/2021 0000222556 TEST presse grove and decine		0.01
Training Profile		Authorised		^
Web Timesheets Jobs & Careers				Value
Form Litelory		Date         Form         Description           Introduction         000000888         February 2000		0.00
Documentation				
RRS		Withdrawn		^
Sich Self Certification Form	(	Table Form Description		Value
Onboard Docs		04/03/2021 0000227582* Renuwy 3021		5.60
My Forms				
		Con Con	luate Trainee Proje	ate New Galm
			Cre	

To adjust this claim, click on the <u>underlined</u> form number or the <u>underlined</u> writing in the **Form History** screen, then click **Re-Open** in the bottom right-hand corner of the screen.

							Employee Search		? 🧃	۱
Position Graduate Trainee Project Officer (	(HR)									
Description February 2021										
Travelling Expenses						[ <u>help</u> ]				
ourney										
Date 5	Start Time		End Time	Vehicle		Standard Journey	Mileage	Taxable Mileage	VAT receipt	
01/02/2021	09:30		10:45	C1450			50			
No. of Passengers	Non-Standard Journey			Override Cost	Centre					
	Carmarthen to Cardiff Training Se	ssion RL								
xpenses										
Abelloes										
	Date	Start Time	End Time	Value		Receipt Override Cost Cen	tre			
inch	01/02/2021	00:00	00:01	5.60		У				
	Description Lunch During Training Sessi	00								
AND TOTAL						5.60				
al for Travelling Expenses						50 Miles		_		
								$\frown$		
							(	Re-oper	n ) B4	ack
w w k k k k k	🕶 oo 💿									ł

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 <u>resourcelink@carmarthenshire.gov.uk</u>