# MyView Dashboard Guidance

## **Expenses User Guide**

**Reviewed March 2021** 

carmarthenshire.gov.wales



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#### **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/

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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:

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#### **Travelling Expenses**

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			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.

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Travelling Expenses					[ <u>help</u> ]				
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- **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.

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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 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.

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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.

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

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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.

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Training Profile	03/03/02021 0000225554 TEST please ignore and decline			0.01
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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
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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.

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Create/Vew/Edit Expenses	If claims are being made in respect of relocation expenses then the Tauable Mileger box needs to be stoled			
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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:

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	Jobs & Careers	DBS Subscription Purchases Reimbursement	Date Start Ti	-	nd Time Value					
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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	
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To add more than one expense item to the claim click on the expense drop down to select the additional item.

Expenses								
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Select	Description Lunch During Training Se	ession						
GRAND TOTAL							5.60	
fotal for Travelling Expenses							50 Miles	
							Submit Save Reset	Back

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**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					
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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**.

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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.

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S k Self Certification Form ( boarding board Docs Forms		Graduate Trainee Project Officer Create New
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#### 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.

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		Ciripoyee Search	<u>ч</u> ( 🛞
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Graduate Trainee Project Officer (HR)	Expense Claims [ You have 4 claims ]		
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Click on [Withdraw] in the bottom right-hand corner of the screen.

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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
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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.

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