

# MyView Dashboard Guidance

## Expenses User Guide

Reviewed March 2021

[carmarthenshire.gov.wales](http://carmarthenshire.gov.wales)

Cyngor **Sir Gâr**  
**Carmarthenshire**  
County Council



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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.

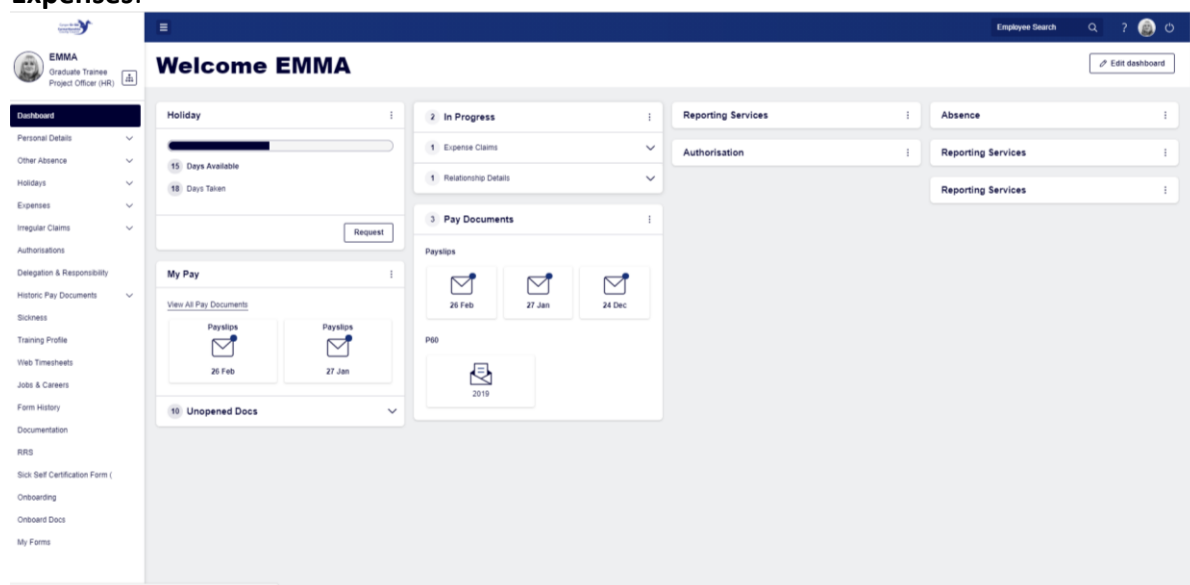
The Expenses Module enables staff to submit their Business Mileage and Expense Claims (reimbursement of money whilst fulfilling your role). Copies of previously submitted and approved claims entered through the Self-Service Module can also be viewed in My Forms.

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/>

## 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:

The screenshot shows the EMMA system interface. On the left is a navigation menu with 'Expenses' and 'Create/Edit Expenses' highlighted. The main area is titled 'Expense Claims [ You have 3 claims ]'. Below this title are three sections: 'Open', 'Submitted', and 'Authorised', each containing a table of claims. A red circle highlights the 'Travel Rates Policy Document' link at the top. Another red circle highlights the 'Create New Claim' button at the bottom right, which is next to a dropdown menu showing 'Graduate Trainee Project Officer (HR)'.

## Travelling Expenses

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

The screenshot shows the 'Employee Expenses' form. At the top, there are instructions and a 'Please Note' section. Below this is the 'Travelling Expenses' section, which includes a 'Journey' table with columns for Date, Start Time, End Time, Vehicle, Standard Journey, Mileage, Taxable Mileage, and VAT receipt. There are also fields for 'No. of Passengers', 'Non-Standard Journey', and 'Override Cost Centre'. At the bottom, there is an 'Expenses' section with a table for recording individual expenses, with columns for Date, Start Time, End Time, and 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** 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 **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., 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 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.

The screenshot shows a web application interface for 'Travelling Expenses'. At the top, there is a navigation bar with 'Employee Search' and a help icon. Below the navigation bar, there is a disclaimer: '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'. The main form area is titled 'Travelling Expenses' and includes a 'Journey' section with the following fields: Date (01/02/2021), Start Time (09:30), End Time (10:45), Vehicle (C1450), and Standard Journey (a dropdown menu). The dropdown menu is open, showing a list of predefined routes such as 'Ammanford Library to Llandello Library', 'Ammanford Library to Llandowery Library', 'Ammanford Library to Portharlem Library', 'Ammanford Library to Brynamman Library', 'Ammanford Library to Bello Library', 'Ammanford Library to Carmarthen Library', 'Ammanford Library to Llanelli Library', 'Amman Valley Leisure Centre to Llandowery Leisure Centre', 'Amman Valley Leisure Centre to Newcastle Emlyn Leisure Centre', 'Amman Valley Leisure Centre to St. Clears Leisure Centre', 'Amman Valley Leisure Centre to Parc Myrddin, Carmarthen', 'Amman Valley Leisure Centre to Parc Myrddin Indoor Bowls', 'Amman Valley Leisure Centre to Llanelli Leisure Centre', 'Amman Valley Leisure Centre to Carmarthen Leisure Centre', 'Amman Valley Leisure Centre to Park V. Sports', 'Amman Valley Leisure Centre to Town Hall/Ty Elywn, Llanelli', 'Beacon to County Hall/Spilman St, Carmarthen', and 'Beacon to Nantycil, Carmarthen'. Below the journey fields is an 'Expenses' table with columns for Date, Start Time, End Time, and Value. The 'GRAND TOTAL' is shown as 0.00 and 'Total for Travelling Expenses' as 0 Miles.

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  
 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 February 2021

Travelling Expenses [ help ]

Journey

Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
01/02/2021	09:30	10:45	C1450	Ammanford Library to Llandoverly Library	45	<input type="checkbox"/>	<input checked="" type="checkbox"/>
No. of Passengers	Non-Standard Journey		Override Cost Centre				
				[ Search ]			

Expenses

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

- **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 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.

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 February 2021

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

Journey

Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
01/02/2021	09:30	10:45	C1450	--Select--	50	<input type="checkbox"/>	<input checked="" type="checkbox"/>

No. of Passengers  Non-Standard Journey  Override Cost Centre

**Expenses**

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

Employee Search

6) 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 February 2021

Travelling Expenses [help]

Journey

Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
01/02/2021	09:30	10:45	C1450	--Select--	50	<input type="checkbox"/>	<input checked="" type="checkbox"/> +

No. of Passengers Non-Standard Journey Override Cost Centre  
 Carmarthen to Cardiff RL training session full ds

Expenses

Date	Start Time	End Time	Value
--Select--			

GRAND TOTAL 0.00  
Total for Travelling Expenses 0 Miles

16:25 04/03/2021

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.

Employee Search

Dashboard / Create/View/Edit Expenses

## Employee Expenses

Travel Rates Policy Document

I certify that:  
a) Mileages claimed have been necessarily incurred solely in connection with County Council business.  
b) Where subsistence expenses are claimed, additional expenditure has been incurred above normal outlay and represents actual expenditure.  
c) The vehicle used in respect of this claim meets all legal requirements in respect of roadworthiness.  
d) 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.  
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 February 2021

Travelling Expenses [help]

Journey

Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
01/02/2021	09:30	10:45	C1450	--Select--	50	<input type="checkbox"/>	<input checked="" type="checkbox"/> +
			--Select--	--Select--		<input type="checkbox"/>	<input type="checkbox"/> -

No. of Passengers Non-Standard Journey Override Cost Centre  
 Carmarthen to Cardiff RL training session full day



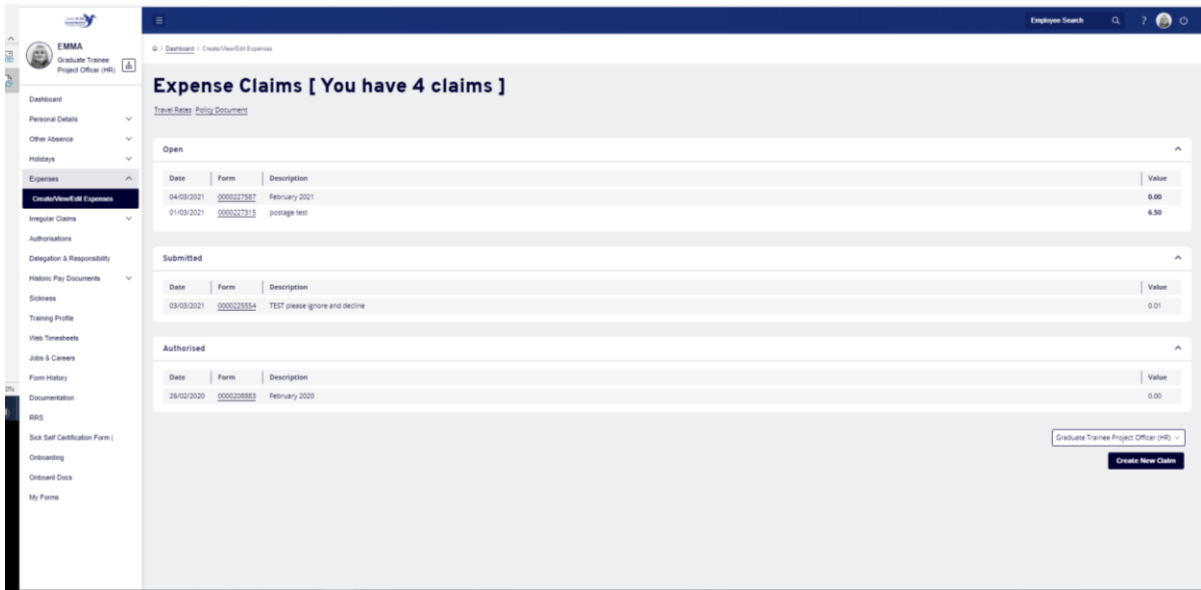
A screenshot to illustrate the written explanation.

The screenshot shows a web application interface for 'Travelling Expenses'. It features two 'Journey' sections, each with fields for Date, Start Time, End Time, Vehicle, Standard Journey, Mileage, Taxable Mileage, and VAT receipt. The first journey is filled out with the date 01/02/2021, start time 09:30, end time 10:45, vehicle C1450, and a mileage of 50. Below the journey sections is an 'Expenses' table with columns for Date, Start Time, End Time, and Value. At the bottom right of the form, there are buttons for 'Submit', 'Save', 'Reset', and 'Back'. A blue arrow points to the 'Save' button. The system clock in the bottom right corner shows 16:28 on 04/03/2021.

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.

The screenshot shows a confirmation message in a web application. The message reads: "Confirmation Message! Your claim has been saved as claim number 0000227587". There is a "Continue" button at the bottom right. The browser's address bar shows "Dashboard / Create/View/Edit Expenses".

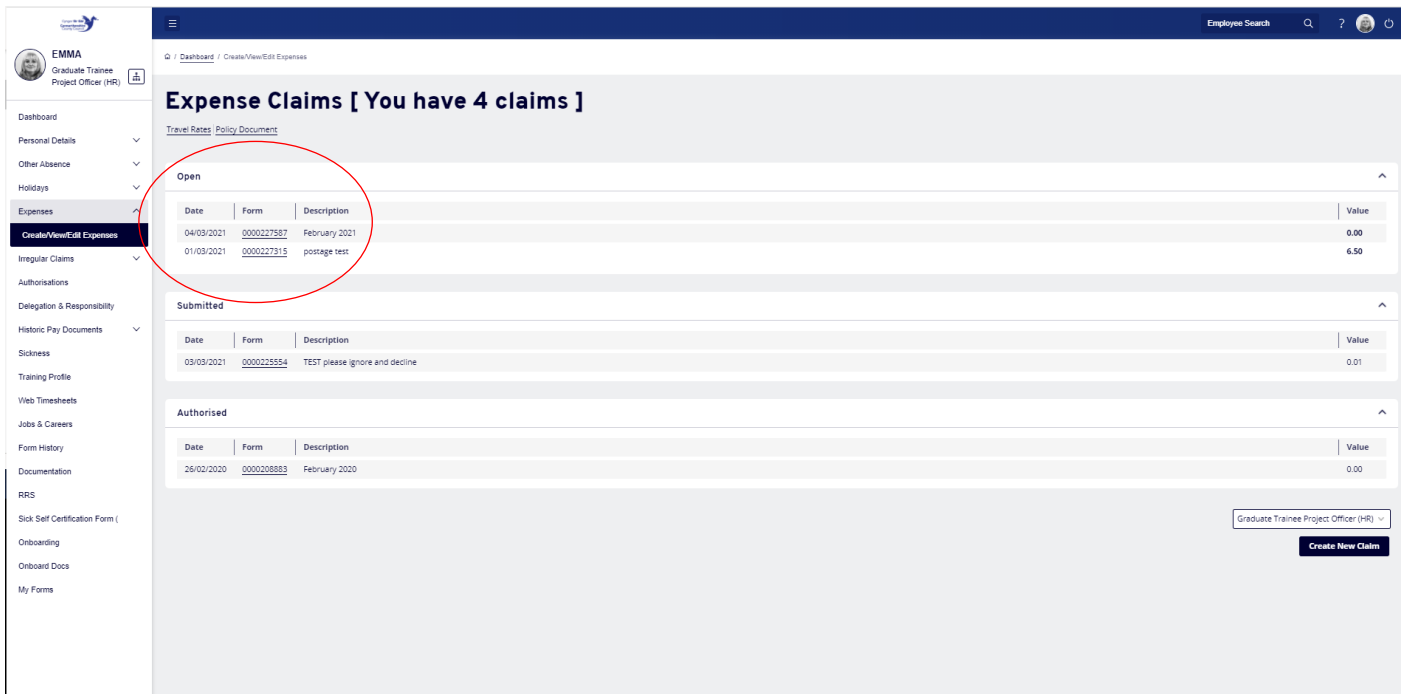
Your saved claims will be displayed in the section titled **Open**.



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 **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.



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 the EMMA Employee Expenses form. At the top, there is a navigation bar with 'EMMA Graduate Trainee Project Officer (HR)' and 'Employee Search'. The main heading is 'Employee Expenses'. Below this, there are instructions and a red error box that reads: 'There are errors on 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 error box, the form details include: Number: 000027587, Position: Graduate Trainee Project Officer (HR), and Description: February 2021. The 'Travelling Expenses' section has a '[ help ]' link. A table titled 'Journey' contains one row with the following data: Date: 01/02/2021, Start Time: 09:30, End Time: 10:45, Vehicle: C450, Standard Journey: --Select--, Mileage: 50, and Taxable VAT Mileage receipt: checked. The 'Non-Standard Journey' field is highlighted with a red circle, and a red error box surrounds it with the text: 'ERROR - Incomplete Line This line is incomplete. Please review this line ensuring that you complete all fields.' Below the table is an 'Expenses' section with columns for Date, Start Time, End Time, and 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:

The screenshot shows the EMMA system interface for claiming expenses. The user is logged in as 'EMMA Graduate Trainee Project Officer (HR)'. The page displays a form for entering expense details. A dropdown menu is open, showing a list of expense categories. The form fields include 'End Time' (10:45), 'Vehicle' (£1450), 'Standard Journey' (dropdown), 'Mileage' (50), and 'Taxable VAT Mileage receipt' (checkbox). A 'Search' button is visible. At the bottom, there are 'Submit', 'Save', 'Reset', and 'Back' buttons.

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
Lunch	01/02/2021	00:00	00:01	5.60	y	
Description Lunch During Training Session						
--Select--						
GRAND TOTAL						5.60
Total for Travelling Expenses						50 Miles

Submit Save Reset Back

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	y	
Description Lunch During Training Session						
--Select--						
GRAND TOTAL						5.60
Total for Travelling Expenses						50 Miles

Submit Save Reset Back

**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

	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

resourceink.carmarthenshire.gov.uk says  
Are you sure you want to submit this claim for processing?  
OK Cancel

Position Graduate Trainee Project Officer (98)  
Description February 2021

Travelling Expenses [help]

Journey

Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
01/02/2021	09:30	10:45	CV400	-Select-	50	<input type="checkbox"/>	<input checked="" type="checkbox"/>

No. of Passengers Non-Standard Journey Override Cost Centre  
Carmarthen to Cardiff Training Session RL Search

Expenses

Date	Start Time	End Time	Value	Receipt	Override Cost Centre
01/02/2021	00:00	00:01	5.60	<input type="checkbox"/>	-Select-

Description  
Lunch During Training Session

GRAND TOTAL 5.60

Total for Travelling Expenses 30 Miles

Submit Save Reset Back

**Note: The Expense Claim Summary Report is displayed on screen and must 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**.

Expense Claims Claim Form Summary

Travel Rates Policy Document

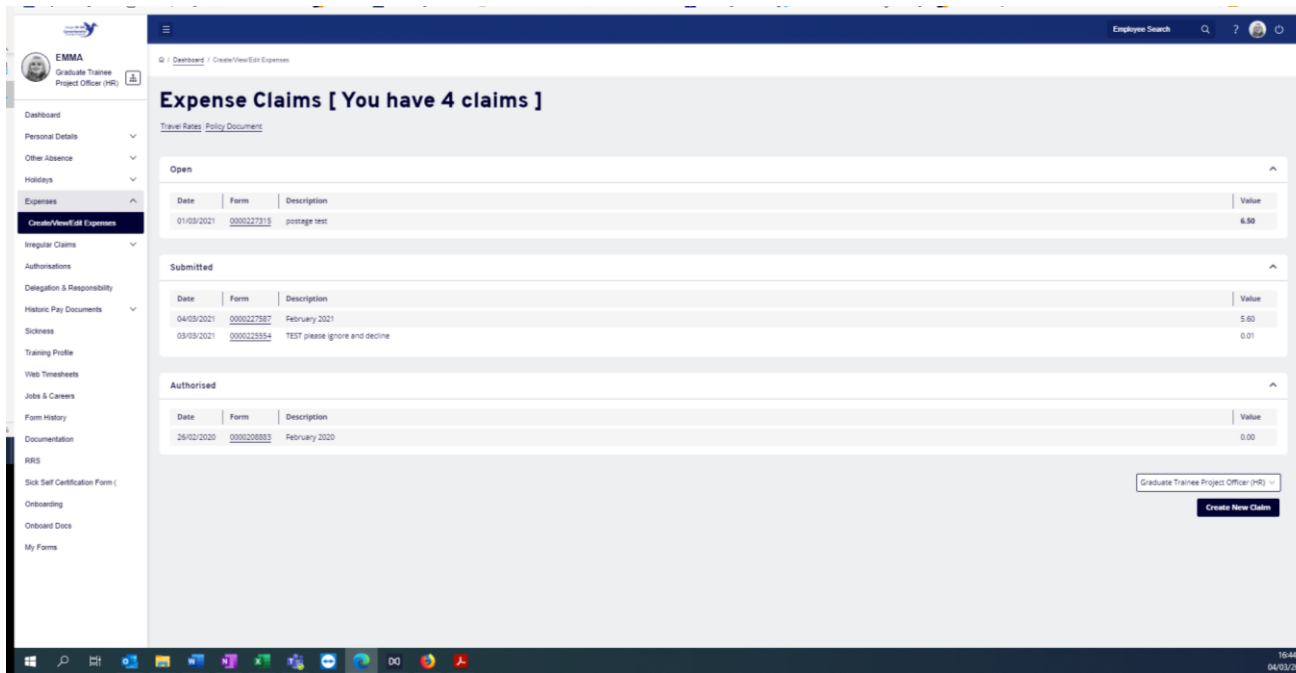
Employee Number 0011237  
Employee Name EMMA HUGHES  
Claim Number 0000227587  
Claim Date 04/03/2021

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

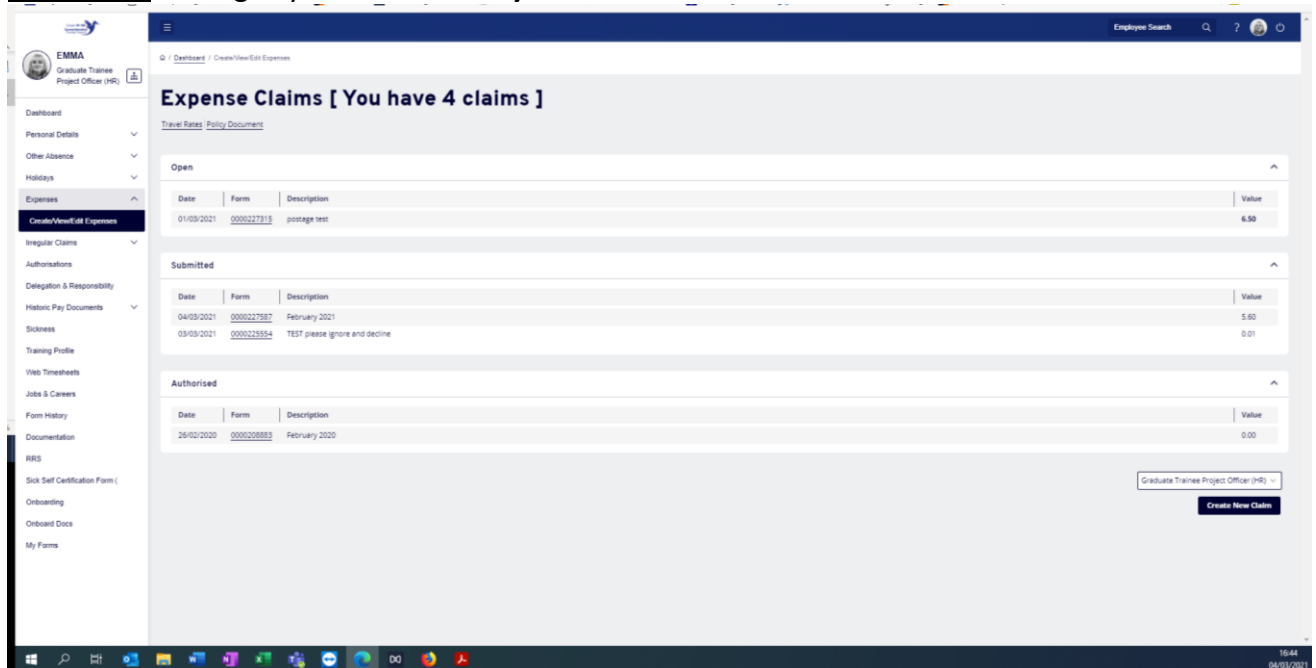
Continue Print

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



### 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 underlined writing in your **Form History** screen to view the claim.



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

Position Graduate Trainee Project Officer (HR)  
Description February 2021

Travelling Expenses [ help ]

Journey

Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
01/02/2021	09:30	10:45	C1450		50	<input type="checkbox"/>	<input checked="" type="checkbox"/>

No. of Passengers  
Non-Standard Journey  
Override Cost Centre

Expenses

Date	Start Time	End Time	Value	Receipt	Override Cost Centre
01/02/2021	00:00	00:01	5.60	y	
Description Lunch During Training Session					

GRAND TOTAL 5.60

Total for Travelling Expenses 50 Miles

Withdraw Show Summary Back

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

OK Cancel

Position Graduate Trainee Project Officer (HR)  
Description February 2021

Travelling Expenses [ help ]

Journey

Date	Start Time	End Time	Vehicle	Standard Journey	Mileage	Taxable Mileage	VAT receipt
01/02/2021	09:30	10:45	C1450		50	<input type="checkbox"/>	<input checked="" type="checkbox"/>

No. of Passengers  
Non-Standard Journey  
Override Cost Centre

Expenses

Date	Start Time	End Time	Value	Receipt	Override Cost Centre
01/02/2021	00:00	00:01	5.60	y	
Description Lunch During Training Session					

GRAND TOTAL 5.60

Total for Travelling Expenses 50 Miles

Withdraw Show Summary Back

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

Employee Search

Dashboard / Create/View/Edit Expenses

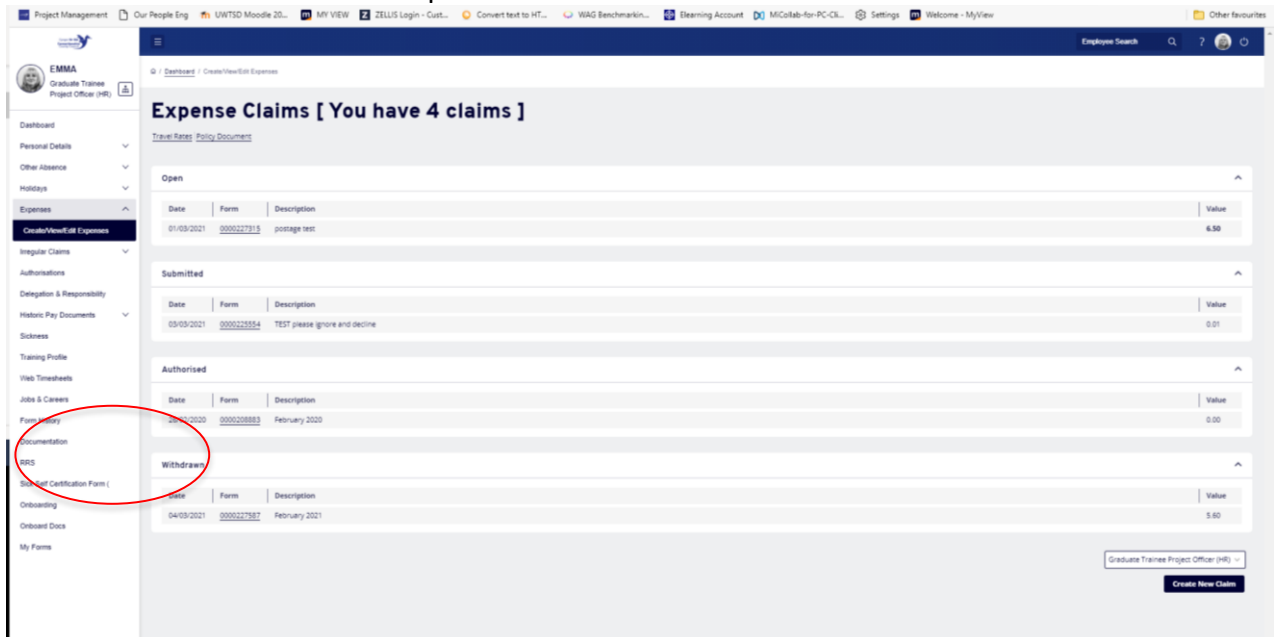
Confirmation Message!  
Your claim number 0000227587 has been withdrawn

Continue

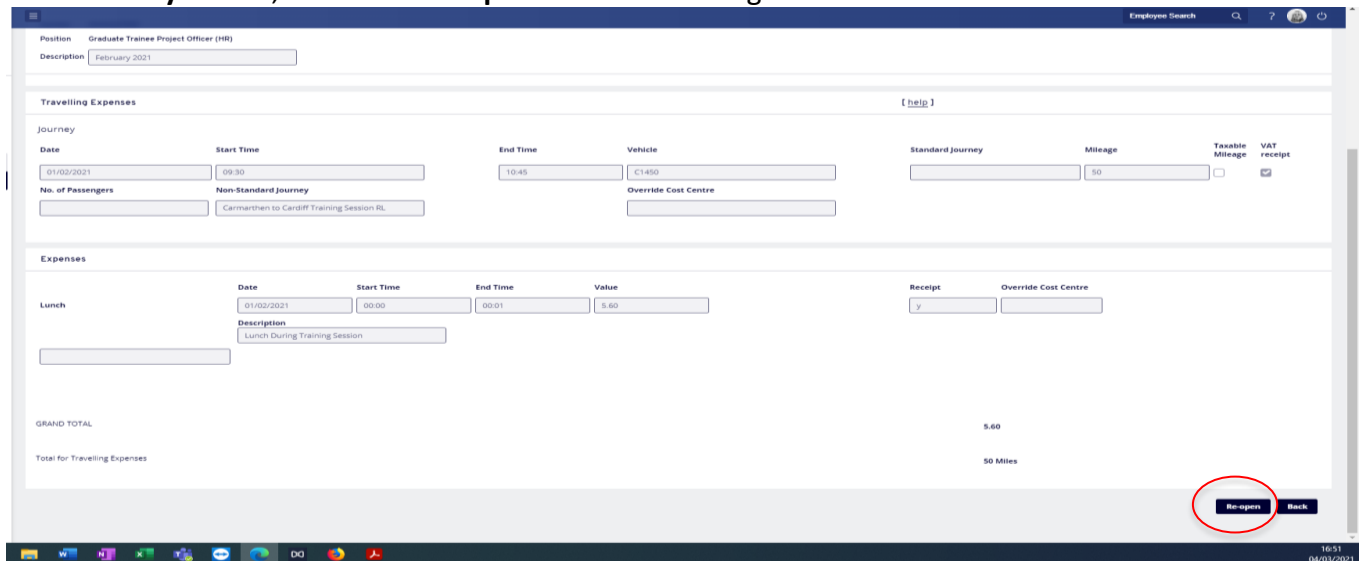


The Withdrawn claim is then displayed in the **Withdrawn** Section of the Expense Claim screen:

A screenshot to illustrate the written explanation.



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



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](mailto:resourcelink@carmarthenshire.gov.uk)

