

# Mileage and Expenses Claims

## Self-Service User Guide

This is a step by step guide on how to submit a Mileage and Expenses claim.

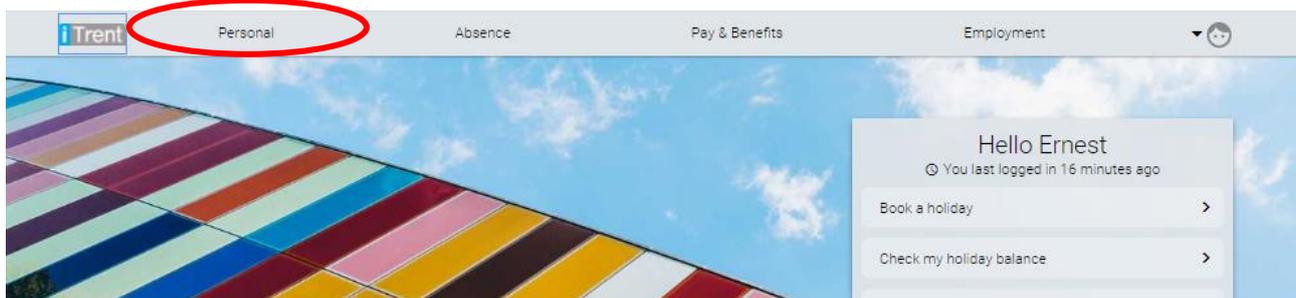
All mileage and expenses claims must be submitted on Self-Service.

Self-Service is a secure Internet based application and can be accessed from any type of device with internet access.

### Step 1 – To commence a Claim

To commence claiming mileage you **will** need to first enter the details of your vehicle.

Vehicle details can be stored within Self-Service to facilitate the input of mileage claims without the need to keep selecting the vehicle details on each claim. To enter vehicle details select “Personal”.



On the “Private Vehicles” section click on “Add Vehicle”.



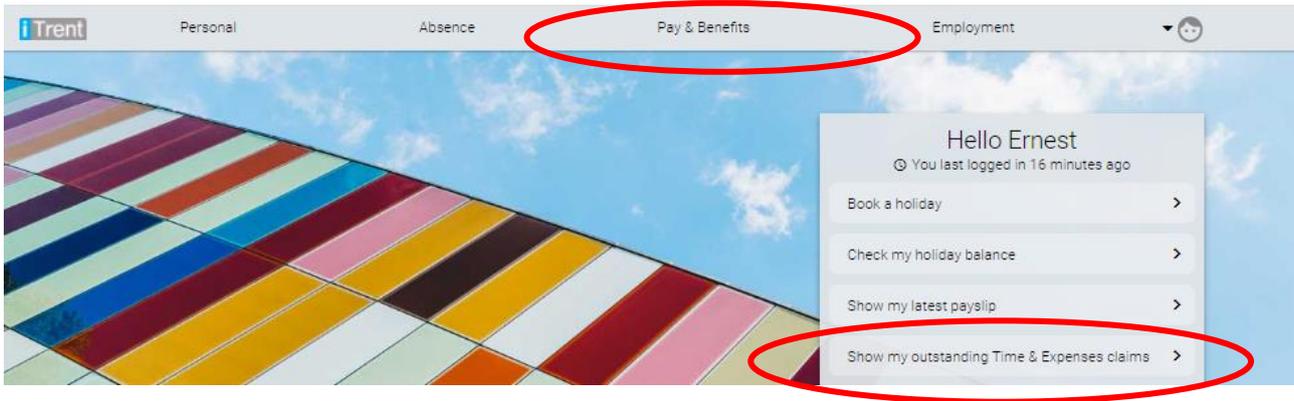
Enter your vehicle details, and tick the box “Default vehicle for expenses” then click Save.

You can add more than one car but may only select one to be the default vehicle.

A screenshot of a "Vehicle details" form. The form has a dark grey header with a white "X" icon. The fields are: "Vehicle type" with a dropdown menu showing "Car"; "Vehicle registration" with the text "AB2 3DE"; "Start date (dd/mm/yyyy)" with the text "01/02/2021" and a calendar icon; "End date (dd/mm/yyyy)" with a calendar icon; "Engine size (cc)" with the text "2000"; "CO2 Emission" with the text "120g"; "Fuel type" with a dropdown menu showing "Petrol" and a downward arrow. At the bottom, there is a checkbox labeled "Default vehicle for expenses" which is checked and circled in red. Below the form, there are three buttons: "Save" (green), "Cancel" (grey), and "Delete" (red), with the "Save" button circled in red.

## Step 4 – Entering a Claim

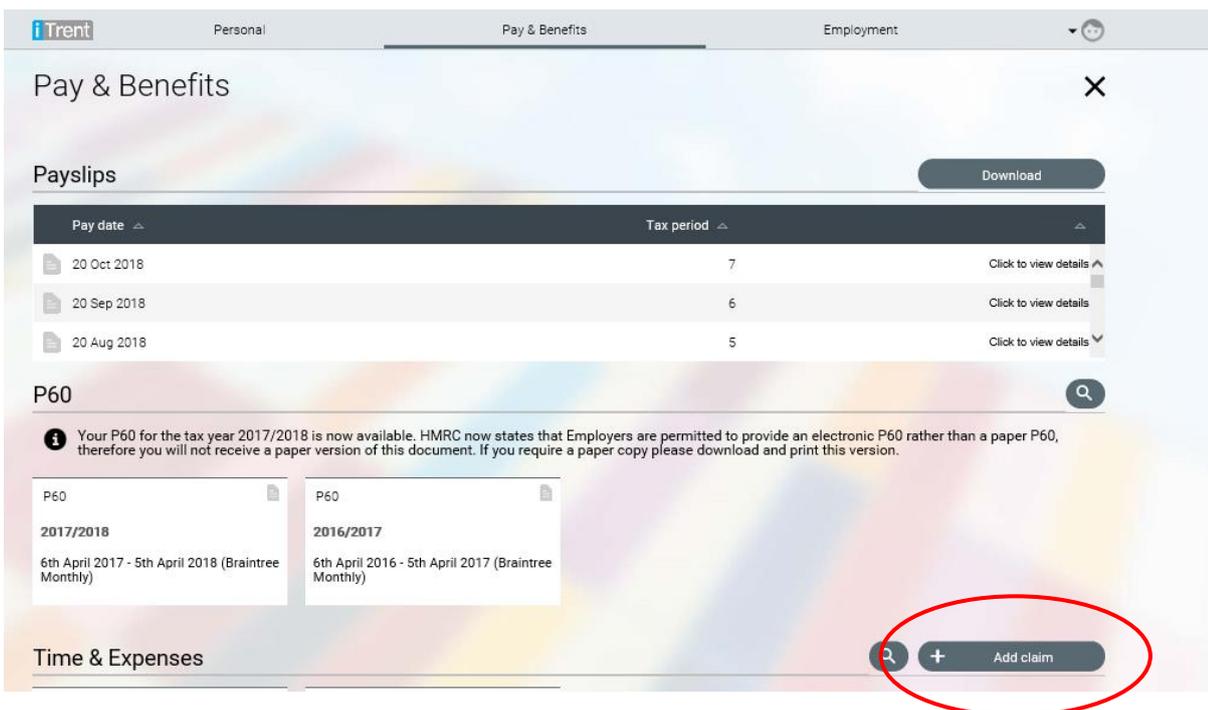
To add a claim for mileage, click either on the “Pay & Benefits” tab or the “Show my outstanding Time & Expenses” link



## Step 5 – Adding a Claim

Click on the ‘Add claim’ button.

Hint: The magnifying glass will show historic claims once you have any.



## Step 6 – Entering Claim Details

Enter the start date of the claim period (usually 1<sup>st</sup> of the Month claim is for).

Select “Mileage & Expense Claims” from the claim template and then click ‘New’ at the bottom of the screen.

If you only have one role in your organisation you will not need to do anything with the Job Title. If you have more than one role you will need to select which job you are claiming the hours against.

The screenshot shows a web interface for entering a new claim. The title bar reads "Time and expenses" with a close button (X). The main heading is "Time & Expenses claim entry: New".

Fields and their values:

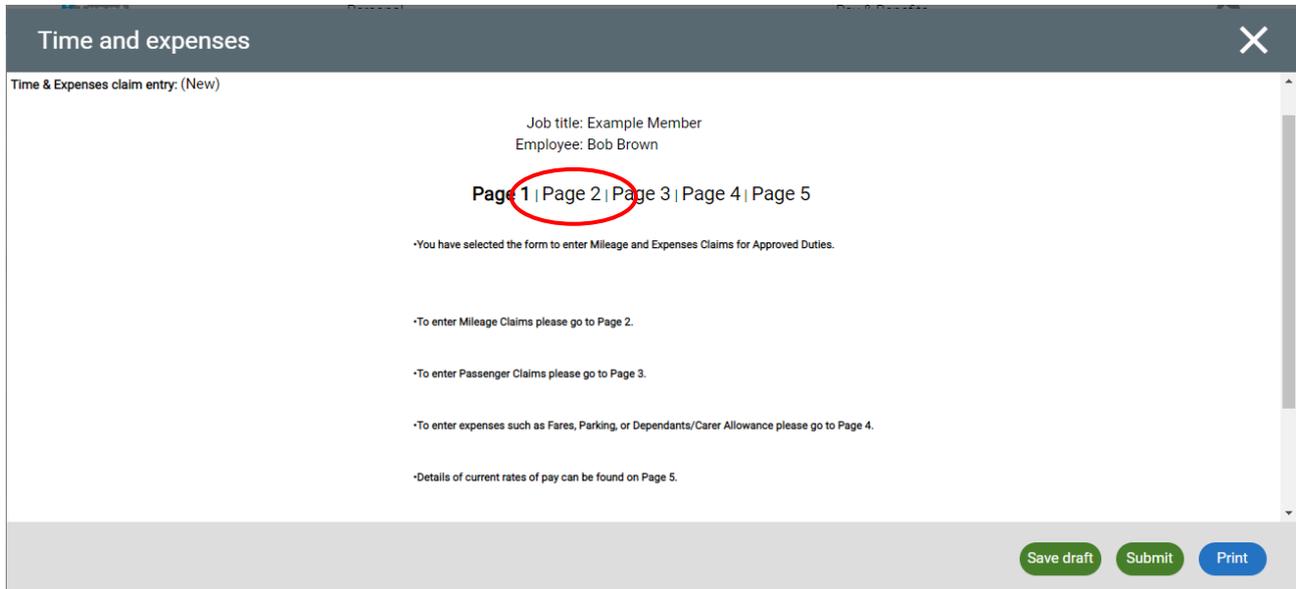
- Start date:** 01/03/2021 (circled in red)
- Job title:** EXAMPLE MANAGER
- Claim template:** Please choose (dropdown menu is open, showing options: Please choose, Example Casual Hours Claimed, Example G.E.I. Sessions - Casuals, Example Mileage & Expenses Claims (circled in red), Example Overtime Claim)

A blue "New" button is located at the bottom right of the form.

## Step 7 – Enter details of Claim

To enter a claim for mileage click on Page 2. If you took a passengers) also complete page 3. You will need to click on page 4 for expenses e.g. claim for car parking fees.

Hint: Please take your time to familiarise yourself with the pages of the form. Notes are within the webpage.



Time and expenses

Time & Expenses claim entry: (New)

Job title: Example Member  
Employee: Bob Brown

**Page 1** | Page 2 | Page 3 | Page 4 | Page 5

-You have selected the form to enter Mileage and Expenses Claims for Approved Duties.

-To enter Mileage Claims please go to Page 2.

-To enter Passenger Claims please go to Page 3.

-To enter expenses such as Fares, Parking, or Dependents/Carer Allowance please go to Page 4.

-Details of current rates of pay can be found on Page 5.

Save draft Submit Print

## Step 8 - Entering Claim Details

If step 3 (vehicle details) has been completed the car details will be shown under Vehicle details. If not the vehicle details will need to be completed on this screen. If added at this stage they will not be stored for future forms.

Complete the form as follows;

- Date – Date of journey
- Miles Claimed – Miles being claimed for approved duty
- From – Start of journey (80 Characters)
- To - Destination (80 Characters)
- Reason for (250 Characters)
- '+' add another line if you have another journey to claim for

The screenshot shows a web form titled "Time and expenses" with a close button (X) in the top right corner. The form content includes:

- Job title: Example Member
- Employee: Charlotte Best
- Page navigation: Page 1 | Page 2 | Page 3 | Page 4
- Instructions: Please enter details of mileage claims for approved duties. Receipts can be attached after submission.
- Vehicle and Scheme selection: EED1 1EE RDC Members Mileage (dropdown menu)
- Table with columns: Date, Miles claimed, Passengers, From, To, Reason for Journey
- Table row: 01/02/2021, 10, 1, Braintree, Halstead, Planning Meeting
- Bottom right buttons: Save draft, Submit, Print

At this stage the claim can either be submitted or saved.

For any other expenses such as parking or train fares go to page 4 of the claim and complete. If you are submitting an expense which has a VAT receipt select Non Taxable Expenses VAT from the drop down. If you do not have a VAT receipt (you may still have a receipt) select Non Taxable Expenses.

Time and expenses

Page 1 | Page 2 | Page 3 | **Page 4** | Page 5

Enter details of any expenses on this page.

If you are submitting a non-VAT receipt to support this claim please select RDC Non Taxable Expenses from the drop down below.

If you are submitting a VAT receipt to support this claim please select RDC Non Taxable Expenses VAT from the drop down below.

Receipts can be attached after submission.

	Date	Reason for Claim		
Non Taxable Expenses	01/02/2021	Parking - planning meet	5.00	+ -
Non Taxable Expenses VAT	02/02/2021	Train - Seminar	15.00	+ -

Save draft Submit Print

## Step 9 – Submitting Claims

Once the details have been entered onto the claim it can be saved or submitted.

Save the claim if you are likely to have more details to enter, for example you can enter mileage undertaken at the beginning of the month and may still have some journeys to make at the end of the month. When a claim is saved, it sits within your Self-Service until you click back onto it and press submit.

Submit your claim **ONLY** when you are sure that you need make no further claim in that period.

Once you submit your claim, it will be submitted to your line manager for authorisation.

The Authoriser has the option to 'authorise' or 'not authorise' your claim. If they authorise the claim, it is processed by iTrent for payment in the next payroll run and paid direct to your bank account.

If they do not authorise the claim you will receive a system generated email telling you that your claim has not been authorised and therefore you will need to discuss this with your line manager and make changes and re-submit where appropriate.

## Step 10 – Adding receipts to Expenses Claims

Claims for mileage must be submitted with a VAT fuel receipt for the period of your claim.

Once you have submitted you will be asked to enter your password, and receipts for mileage and expenses claims **MUST** be submitted on this screen.

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Changes have been saved.

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**Time & Expenses claim submission:**

Claim template  
Example Mileage & Expenses Claims

Job title  
EXAMPLE MANAGER

Time and expenses claim reference  
MIL00002

Payroll  
RDC Monthly

Start date  
01/03/2021

Comments  
By submitting this form you are certifying that each journey claimed was in the Council's service via the most economical route and Public Transport was not appropriate. I certify that I have the appropriate cover for business use on my insurance.

Password

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**+ Receipt attachments**

To attach a receipt to your expenses claim clicked on **+ Receipt attachments**

Select the receipt type and then attach the receipt by browsing to the location where you have saved.

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**– Receipt attachments**

Receipt type ▼

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Attach receipt



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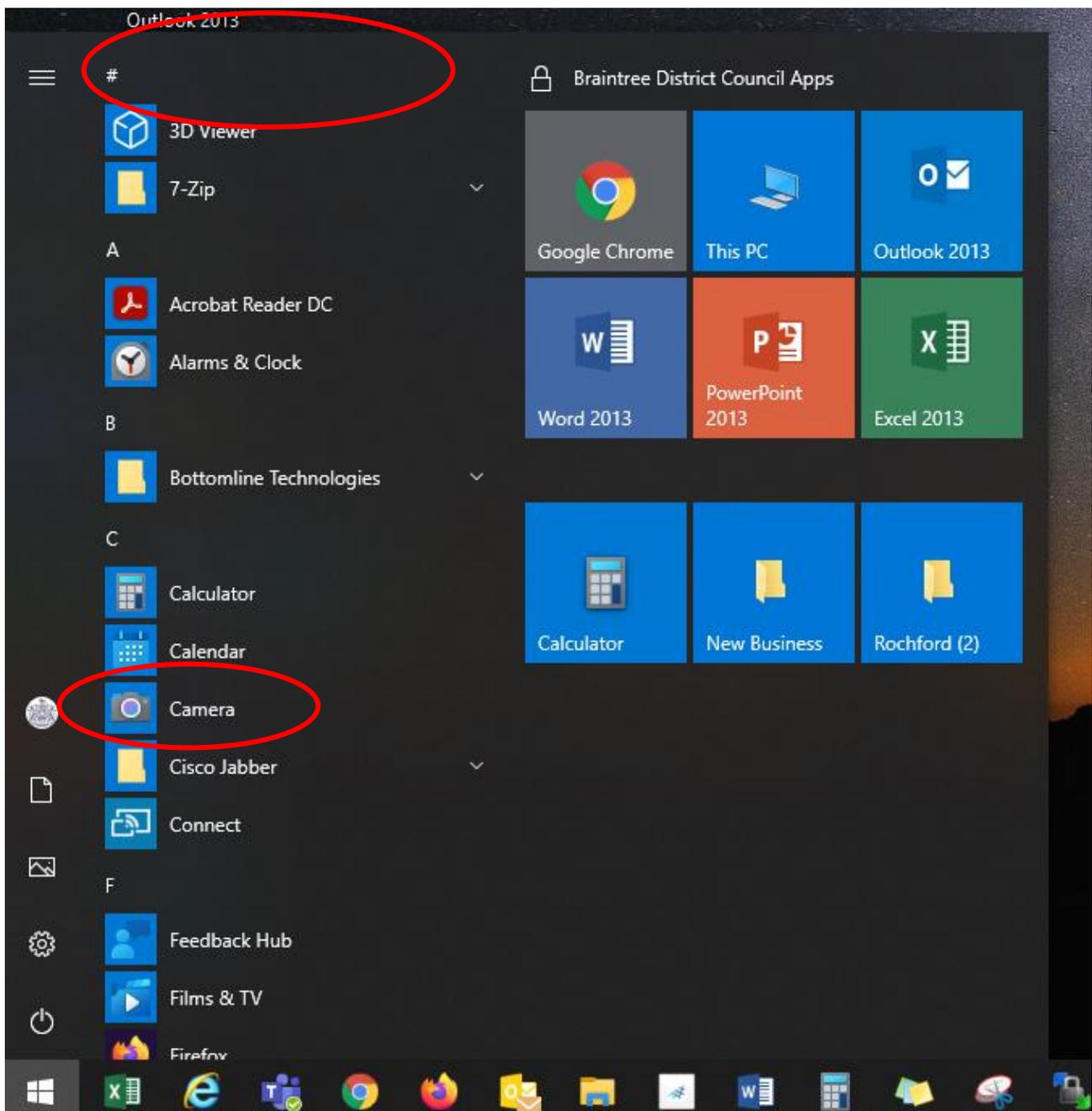
Hint: You will need to take a photo of your receipts and save it on the device on which you will process your application.

E.g. Take photo with your tablet/smart phone/laptop camera and save it to your device to upload.

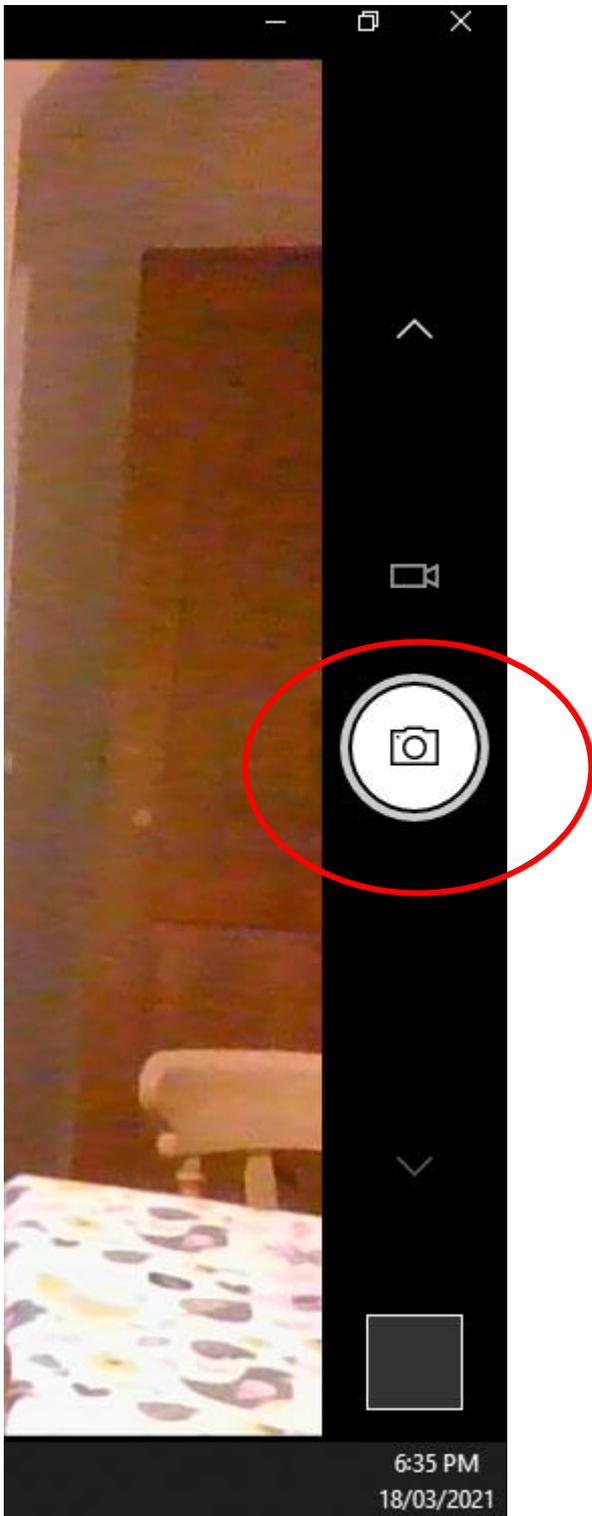
To take a photo with your laptop camera go to the windows icon, usually based in the bottom right hand corner of your screen.



Either click on the camera icon or search 'camera' in the search bar (please note your screen may look slightly different dependent on system version and settings)



When on the camera app hold your receipt in front of the camera lense on your laptop (usually the middle, top of screen), you may need to move it away from or nearer to the lens to get it in focus, and click on the 'take photo' button, which will hopefully look something like this;



## Step 11 - Submitting Claim for authorisation

Once your claim has been submitted, it will be marked as awaiting authorisation

Hint: The paperclip indicates that you have attached receipts to your Claim

**Hints:** The authorisation status of claims are shown on the Pay and Benefits page of Self-Service

The statuses are:

Rejected                                      This claim has not been authorised

Awaiting authorisation                      This claim is awaiting authorisation

Provisional                                      This claim has been saved by the Employee, but not submitted for approval. Additions can be made to this claim

