

## Employee Self Service: Enter Expenses

This guide will help you use Employee Self Service to make expenses and mileage claims.

### Creating a new claim:

1. Click on 'Enter online expenses' in the Employee Self Service menu.
2. You will be taken to the 'Expenses Guidance and Home Page'.
3. To start a new claim, click on 'Create New Claim' button.
4. Select the assignment the claim is for by clicking on the pencil icon.
5. Choose the month the claim was incurred – you can claim for the current month or 3 previous months.
6. You will be taken to the 'Enter Expenses' screen.

### Enter Expenses:

The 'Enter Expenses' screen is where you will enter the details of your claim.

Your expense claim information and the vehicle details that are held on the system will be displayed. The 'CC' banding field allows car users to record an alternative engine size if a different vehicle from normal was used.

Choose the 'Mileage Expense Entry' or 'Other Expense Entry' tab as required.

### Mileage Expenses:

You will be presented with the mileage expense entry screen. You need to input:

1. Date of your journey - use the calendar icon to select the date
2. Journey From - enter where your journey began
3. Postcode (from) – enter the post code of where your journey began
4. Journey To - enter the destination of your journey
5. Postcode (to) – enter the post code of where your journey ended
6. Purpose of journey - briefly explain the reason for your journey
7. Passengers - enter the number of passengers in the car if applicable

8. Return - if it was a return journey, click in this box
9. Actual mileage – you must enter the actual miles travelled. Please note that if you clicked on the return box, you will still have to enter your return mileage
10. Miles claimed – this is the number of miles you travelled excluding your home to office mileage (if your journey started or ended at home)
11. Receipt - if you have a VAT receipt for fuel, click on the receipt box
12. Cost code (Non-Default) – this should be left blank unless the claim needs to be paid from a cost code other than your default cost code
13. When you have entered the claim details, click on the 'Commit to Claim' button. The claim details will be recorded and will appear in the 'Mileage Claim Details' area of the screen. The input row will now be clear for you to input a new claim line if required.

## Other Expenses:

Select the 'Other Expense Entry' tab if you need to claim expenses other than mileage:

1. Date – use the calendar icon to select the date you incurred the expense.
2. Expense Type - choose from the claim types displayed in the drop-down list.
3. Reason for Expense - add the reason for the expense.
4. Amount - enter the amount of the money incurred for the expense (you do not need to enter the £ symbol).
5. Receipt – click on the box if you have a receipt.
6. Cost code (Non-Default) – this should be left blank unless the claim needs to be paid from a cost code other than your default cost code.
7. When you have entered the claim details, click on the 'Commit to Claim' button. The claim details will be recorded and will appear in the 'Other Expense Claim Details' area of the screen. The input row will now be clear for you to input a new claim line if required.

## On-screen buttons to help make entering your claim information quick and easy

To use the following buttons, you will need to click the 'Select' box on the relevant row within the 'Claim Details' area of the screen:

- 'Copy Row' – copies the information in the selected row and displays it in the claim input row. This is useful if, for example, you make regular journeys to the same location, as you can then just change the date of travel.
- 'Delete Row' – will remove the selected row altogether
- 'Update Row' – allows you to update the selected row and make any required changes. You will need to click on the 'Commit to Claim' button again for your amendments to take effect.
- 'Clear Input Row' button – if you have started to enter a claim line but do not wish to continue, clicking this button will make the input row blank.

**Remember, expenses must be submitted and approved on, or before the 10<sup>th</sup> of the month to ensure payment in that month's pay. Claims submitted or approved after this date will be automatically paid the following month.**

## When you have finished entering your claim information you have a number of options:

'Save for later' button - allows you to save your claims. You can then make changes or add additional claims for that particular month at a later date. Your claim will be listed in the table at the bottom of the Expenses Home Page. The status of the claim will be 'Saved for Later'.

Refer to the 'To check or update an existing claim or view your claim history' section for guidance on how to progress a 'saved for later' claim.

'Confirm Claim Details' – when you click on this button you will be taken to the 'Review and Submit' screen. You should check the information you have input. If you need to make any amendments to the claim, select 'Edit Claim Details', which will take you back to the previous screen. If the details are correct, click on the 'Submit claim' button. The claim will

be submitted to your line manager for approval. You will receive a confirmation e-mail when it has been approved.

## To check or update an existing claim or view your claim history

- The table at the bottom of the Expenses Home Page lists your claim history. The status of the claim will be displayed, for example, 'Complete', 'In Progress', 'Saved for Later', 'Submitted for Approval', 'Returned for Correction', 'Rejected' or 'Error'.
- To access a claim, click in the 'Select' circle next to the appropriate claim, and then click on the 'View Claim Details' button.
- For claims that have not yet been submitted, you can then click on the 'Edit Claim Details' button and make changes/add claim rows as necessary.
- If required, you can export a summary of all of your Self-Service claims by clicking 'Export Claim Summary'. Or you can export the full details of an individual claim by selecting a claim and clicking 'Export Claim Details'.

## Receipts:

You should provide the receipts with your expense claims. VAT receipts are required for most expenses (including fuel) and have a VAT number.