

## MY EXPENSES & MILEAGE

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Allows you to create and submit expense & mileage claims and to view claims history

After submission but before a claim is authorised, it is possible to withdraw, update and resubmit or delete a claim

We recommend that you submit your claims with enough time for the authoriser to action the claim to meet the relevant deadline

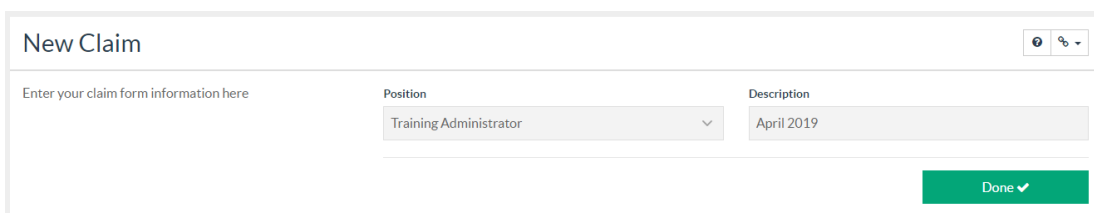
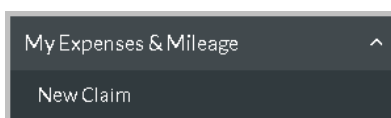
Once a claim has been authorised it **cannot** be changed

A **receipt MUST support every entry of a claim**. Scanned or photographed receipts must contain all information from the front & reverse of the receipt and be clearly legible, as required by HMRC

After uploading copies of receipts it is recommended that you retain the paper receipts for your own records

### CREATING A NEW EXPENSES CLAIM

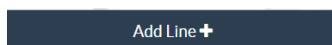
- Click **My Expenses & Mileage**
- Click **New Claim**
- This first **Description** box relates to the **whole** claim. We recommend you type the claim Month & Year. This will make the claim easily identifiable in the future e.g. **April 2019**

A light grey form titled 'New Claim' with a search icon and a refresh icon in the top right corner. Below the title is a large text area with the placeholder 'Enter your claim form information here'. To the right of this area are two input fields: 'Position' with a dropdown arrow and 'Description'. The 'Position' field contains the text 'Training Administrator' and the 'Description' field contains 'April 2019'. A green 'Done' button with a white checkmark is located at the bottom right of the form.

- Click **Done**

### Adding an Expense Claim Line:

- Read the on-screen guidance, which will assist you in completing the claim
- Click on **Add Line**
- Enter the **Date** when the expense was incurred. You can either type this in or select the date from the pop up calendar



**Note:** Claims cannot be created for a future date. A claim must be made for the date the expense was incurred e.g. the date an advance train ticket was purchased, as opposed to the date when the journey is going to be made

- Select a **Group** option from the drop-down list, e.g. **Public Travel**, and then select a Type, e.g. **Ferry Travel**, for your first claim line


Depending on the Group/Type selected, you will be prompted to complete further information for the claim line:

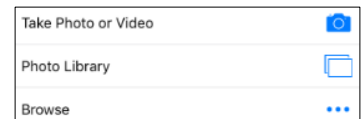
The screenshot shows a claim form with the following sections:

- Claim Information:** Date of Claim (09/04/2019), Group (Public Travel), Type (Ferry Travel), and Description (250 characters remaining).
- Costs and Receipts:** Value, Receipt, and Cost Centre (Default) with a search button.
- Attachments:** Add Attachments button.

- Add a full and meaningful **Description** to enable the authoriser to identify the reason for the claim.
- Enter the **Value** of the expense
- Leave the **Cost Centre** code as **Default**, unless you have been advised to provide an alternative code for your claim
- Number your paper receipt and enter the corresponding number in the **Receipt** field
- Attach a scanned copy/photo of your receipt to the claim line (alternatively, if your receipt covers more than one claim line, you can **Add Claim Attachments**, as described later in this document):

*Tablet or smart phone:*

- Click on the **Add Attachments**  button
- Select **Take a Photo**
- When your tablet/phone camera opens take a photo of the receipt
- If you are happy with the photo select **Use Photo** to upload it to MyView, where it will show as an image file



The screenshot shows the claim form with the following details:

- Claim Information:** Type (Ferry Travel), Description (Meeting A, 14:00 - 16:00, Brixham Town Hall, TQ5 8TA, 198 characters remaining).
- Costs and Receipts:** Value (3.50), Receipt (1), Cost Centre (Default).
- Attachments:** Add Attachments button and an attached image file (image.jpg, 921.7 KB).

*PC/laptop:*

Using a scanner or camera, scan/photograph the receipt and save to your PC/laptop, ensuring the copy contains any relevant information from the reverse of the receipt and is clearly legible, as required by HMRC

- In **MyView**, click on **Add Attachments**
- Navigate to the copy of the receipt on your PC/laptop and click **Open**. We recommend that you give this file the same name as the claim description and the receipt number for this line e.g. April 2019\_1

Claim Information

Date of Claim: 09/04/2019

Type: Ferry Travel

Group: Public Travel

Description: Meeting A 14:00 - 16:00 Brixham Town Hall TQ5 8TA  
201 characters remaining

Costs and Receipts

Value: 3.50

Receipt: 1

Cost Centre: Default

Attachments

April 2019\_1.pdf (145.8 KB)

Cancel OK

- Now all the boxes are complete, click **OK**. The line you have added now appears on the screen in the **Open** state

Claim Information

Date of Claim: 09/04/2019

Add Line +

Select Group --

Cancel OK

**Open** Total Lines: 1 Total Value: £3.50

Cost Centre:	Date of Claim	Group	Type	Value
Default Cost Centre	09/04/2019	Public Travel	Ferry Travel	£3.50

Attachments: Add Claim Attachments

Your Expense Claim

Total Lines: 1

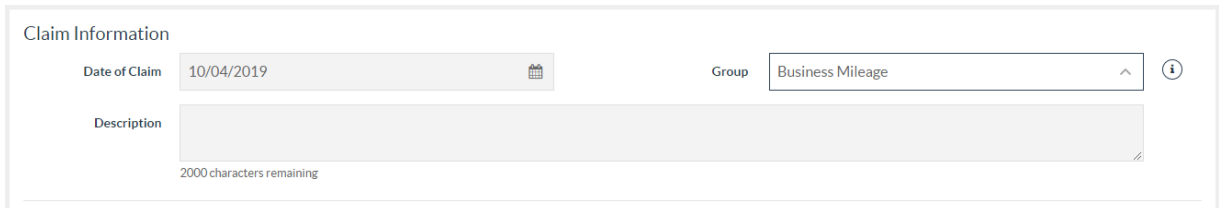
Total Value: £3.50

Submit Save Clear

- To continue with the same claim and add more lines, select **Add Line**

## Adding a Mileage Claim Line:

- Click on **Add Line**
- Enter the **Date** when the expense was incurred
- Select **Business Mileage** from the **Group** option drop-down list:



The screenshot shows a 'Claim Information' form with the following fields:

- Date of Claim:** 10/04/2019 (with a calendar icon)
- Group:** Business Mileage (with an upward arrow and an information icon)
- Description:** A large text area with a '2000 characters remaining' indicator at the bottom.

- Add a full and meaningful **Description** to enable the authoriser to identify the reason for the claim. This should include details of your journey including postcodes
- Click on the ⓘ for online instructions related to Business Mileage and/or refer to the relevant policy document
- Enter the number of miles in the relevant **Mileage** box(es)
- Select the relevant **Vehicle** from the drop down list
- Leave the **Cost Centre** code as **Default**, unless you have been advised to provide an alternative code for your claim
- Tick the **VAT Receipt** box if you will be providing a VAT receipt covering the mileage in this claim line
- If your VAT receipt covers more than one claim/claim line, follow the instructions below for **Add Claim Attachments**, otherwise follow the procedure for attaching a receipt to a claim line, provided in the previous section
- Now all the boxes are complete, click **OK**. The line you have added now appears on the screen in the **Open** state

**Note:** Business Mileage is not displayed as a monetary value on the claim line and not included in **Total Value**. This is because the value of the claim is only processed when it reaches payment

## Adding Claim Attachments

When you have a receipt that covers more than one claim/ claim line you can attach it to the relevant claim as follows:

- In the claim summary area click on **Add Claim Attachments**

### Tablet or smart phone:

- Select **Take a Photo**. When your tablet/phone camera opens, take a photo of the receipt and select **Use Photo** to upload it to MyView, where it will show as an image file
- Click **Save**

The screenshot shows a mobile app interface for managing an expense claim. At the top, there's a status bar with 'Open', 'Total Lines: 4', 'Total Miles: 17', and 'Total Value: £10.85'. Below this, the 'Cost Centre' is set to 'Default Cost Centre'. A list of claim lines is displayed with columns for date, group, type, and value. The first line is dated 11/04/2019, group 'Meals', type 'Lunch - Absent during 12.00noon - 2.00pm', and value £7.35. The second line is dated 10/04/2019, group 'Business Mileage', type 'Business Mileage', and value 1. The third line is dated 11/04/2019, group 'Business Mileage', type 'Business Mileage', and value 16. The fourth line is dated 09/04/2019, group 'Public Travel', type 'Ferry Travel', and value £3.50. Below the list, there's an 'Attachments' section with a button 'Add Claim Attachments' and a file 'image (2).jpg (1.1 MB)'. On the right side, there's a 'Your Expense Claim' summary with 'Total Lines: 4', 'Total Miles: 17', and 'Total Value: £10.85'. At the bottom of this summary are buttons for 'Submit', 'Save', 'Delete', and 'Clear'.

### PC/laptop:

- Navigate to the copy of the receipt on your PC/laptop and click **Open**
- Click **Save**

We recommend that you give this file the same name as the claim description and a relevant receipt name/number e.g. April 2019\_Fuel

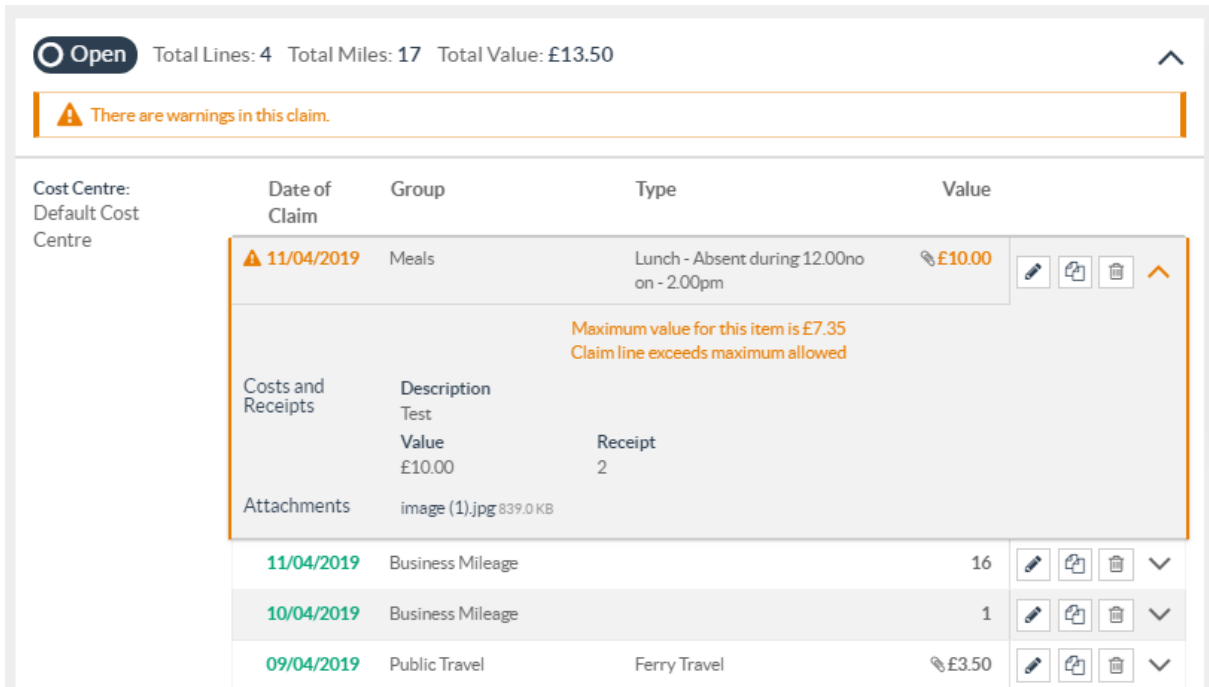
The screenshot shows a PC/laptop interface for managing an expense claim. At the top, there's a status bar with 'Open', 'Total Lines: 4', 'Total Miles: 17', and 'Total Value: £10.85'. Below this, the 'Cost Centre' is set to 'Default Cost Centre'. A table of claim lines is displayed with columns for Date of Claim, Group, Type, and Value. The first line is dated 11/04/2019, group 'Business Mileage', type 'Business Mileage', and value 16. The second line is dated 11/04/2019, group 'Meals', type 'Lunch - Absent during 12.00noon - 2.00pm', and value £7.35. The third line is dated 10/04/2019, group 'Business Mileage', type 'Business Mileage', and value 1. The fourth line is dated 09/04/2019, group 'Public Travel', type 'Ferry Travel', and value £3.50. Below the table, there's an 'Attachments' section with a button 'Add Claim Attachments' and a file 'April 2019\_Fuel.pdf (148.8 KB)'. On the right side, there's a 'Your Expense Claim' summary with 'Total Lines: 4', 'Total Miles: 17', and 'Total Value: £10.85'. At the bottom of this summary are buttons for 'Submit', 'Save', 'Delete', and 'Clear'.

**Note:** A fuel receipt covering more than one mileage claim should only be uploaded as a **Claim Attachment** against the first claim. For the second and subsequent claims the fuel receipt applies to, please attach a document referencing the original mileage claim number and date


















## Expenses Claim Warnings

Should your claim not meet the scheme rules and regulations, a warning is displayed once **OK** has been clicked

- To view the warning, click on the **down-arrow** at the far right of the claim line



The screenshot shows an expenses claim interface. At the top, there is a summary bar with a button labeled 'Open', and statistics: 'Total Lines: 4', 'Total Miles: 17', and 'Total Value: £13.50'. Below this is a warning banner with a yellow triangle icon and the text 'There are warnings in this claim.' The main table lists claim lines with columns for 'Date of Claim', 'Group', 'Type', and 'Value'. The first row is highlighted in orange and has a warning icon on the left. The warning text reads: 'Maximum value for this item is £7.35. Claim line exceeds maximum allowed'. Below this, there is a section for 'Costs and Receipts' with a 'Description Test', 'Value £10.00', and 'Receipt 2'. There is also an 'Attachments' section with 'image (1).jpg 839.0 KB'. The table continues with three more rows: '11/04/2019 Business Mileage' with value 16, '10/04/2019 Business Mileage' with value 1, and '09/04/2019 Public Travel' with value £3.50 and type 'Ferry Travel'. Each row has a set of icons for editing, deleting, and expanding.

Cost Centre: Default Cost Centre	Date of Claim	Group	Type	Value	
	11/04/2019	Meals	Lunch - Absent during 12.00noon - 2.00pm	£10.00	    
	Maximum value for this item is £7.35 Claim line exceeds maximum allowed				
Costs and Receipts	Description Test		Value	Receipt	
			£10.00	2	
Attachments	image (1).jpg 839.0 KB				
	11/04/2019	Business Mileage		16	   
	10/04/2019	Business Mileage		1	   
	09/04/2019	Public Travel	Ferry Travel	£3.50	   

- The reason for the warning is displayed
- Amend the claim using the **pencil** icon, if required, and click **OK** and **Save**

**Note:** These messages are just warnings and users are able to submit a claim with the warnings remaining. It is up to the authorising manager to check the claim before authorising. Managers will also see these warnings if the user has left them in the claim

## Saving and Submitting the Claim

When you have finished adding claim lines:

- Click **Save** – if you want to come back to it later to add more items
- Click **Submit** – if you want to submit the claim for authorisation and payment

## RE-OPENING AN EXPENSE CLAIM

- Click on **My Expenses & Mileage** then **My Claims History**

Description	Event	Status	Raised Date
April 2019	Expense Claims	Open	7 May 2019

- Claims with **Open** or **Rejected** status can be re-opened for further editing or deletion
- Claims with **Submitted** status can be **Withdrawn** for further editing or deletion
- In each case, click on the Claim Description i.e. **April 2019** to edit/ delete the claim

The screenshot shows the 'Claim Information' page. At the top, there is a 'Date of Claim' field and a 'Select Group' dropdown. Below this is an 'Add Line +' button. The main area displays a table of claim lines with columns for Date of Claim, Group, Type, and Value. The table shows four lines: Business Mileage (11/04/2019), Meals (11/04/2019), Business Mileage (10/04/2019), and Public Travel (09/04/2019). To the right of the table is a 'Your Expense Claim' summary panel showing Total Lines (4), Total Miles (17), and Total Value (£10.85). Below the summary are buttons for 'Submit', 'Save', 'Delete', and 'Clear'. At the bottom left, there is an 'Attachments' section with an 'Add Claim Attachments' button and a file named 'April 2019\_Fuel.pdf (148.8 KB)'.

- Click on Add Line to add a new claim line
- Edit, copy or delete an existing line by clicking on the **pencil**, **document** or **recycle bin** icon respectively
- To delete the whole claim click on the **Delete** button

## SUBMITTING AN EXPENSES CLAIM

- Click the **Submit** button when the claim is ready to be sent for authorisation

The screenshot shows a 'Submit Claim' dialog box. It contains the text 'Are you sure you want to submit this claim?' and two buttons: 'Cancel' and 'Yes' with a green checkmark.

- At the Submit Claim screen click **Yes**

**i** Your claim has been submitted for authorisation. If you wish to amend this claim, you must do so before it has been authorised. To amend the claim use the 'Withdraw' button.

- A **submitted** expenses claim is displayed with a **submitted** logo

Submitted Total Lines: 4 Total Miles: 17 Total Value: £10.85

Authorisation Progress

Cost Centre: Default Cost Centre	Date of Claim	Group	Type	Value
	11/04/2019	Business Mileage		16
	11/04/2019	Meals	Lunch - Absent during 12.00noon - 2.0 0pm	£7.35
	10/04/2019	Business Mileage		1
	09/04/2019	Public Travel	Ferry Travel	£3.50

Attachments: April 2019\_Fuel.pdf (148.8 KB)

Your Expense Claim

Total Lines: 4  
Total Miles: 17  
Total Value: £10.85

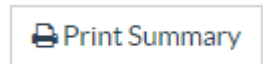
Withdraw

Print Summary

## PRINTING AN EXPENSES CLAIM

Printing an expenses claim is **not required** if you have uploaded copies of your receipts to the claim. If copies have not been uploaded then you **must** print out a **summary sheet** of your submitted claim and attach your paper receipts to this.

- Choose **Print Summary** to print the claim and attach the numbered receipts to the summary. This **must** then be passed to your manager or a person they have delegated the authorisation task to, before your claim can be considered for authorisation



## AUTHORISATION OF YOUR CLAIM

Before your claim goes through to Payroll to be paid it needs to be **authorised**

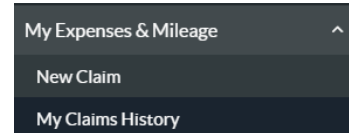
The authoriser will have received an email alerting them to the fact that they have outstanding authorisations to action (Email notifications are sent the morning after your submission)

Once actioned you will receive a confirmation email to let you know if the claim form has been Authorised or Rejected



## MY CLAIMS HISTORY

This screen lists a history of your Expense claims



- Click on **My Expenses & Mileage** then **My Claims History**
- For a summary of a claim, including authorisation progress click the **down-arrow** at the far right of the claim:

Description	Event	Status	Raised Date
April 2019	Expense Claims	Submitted	7 May 2019
<p>Expense Claims</p> <p>Employee: Bobby Brown Form Number: 000021426 Submitted By: Bobby Brown Submitted On: 8 May 2019</p> <p>Claim Description: April 2019 Claim Total Value: 10.85 Claim Total Mileage: 17</p> <p>Authorisation Progress </p>			

- The coloured dots supply information about the authoriser

Available Authorisers

Managers

Billy Bragg  
Manager (TRAINING13)

Close

- Once authorised:

Description	Event	Status	Raised Date
April 2019	Expense Claims	Authorised	7 May 2019
<p>Expense Claims</p> <p>Employee: Bobby Brown Form Number: 000021426 Submitted By: Bobby Brown Submitted On: 8 May 2019</p> <p>Claim Description: April 2019 Claim Total Value: 10.85 Claim Total Mileage: 17</p> <p>Authorisation Progress </p>			

Authorised By

Authoriser

Billy Bragg  
Manager (TRAINING13)

Authorised Date: 8 May 2019  
Authorised Time: 08:51:30

Close

## VERSION CONTROL

Date	Page	Details of Change
November 2016	All	New guide
November 2017	1,4,7,11	Guidance for uploading softcopy receipts, including a new section: Add Claim Attachments
May 2019	All	Complete revision of guide, including new screenshots. Removal of process flowchart.