My Expenses & Mileage

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

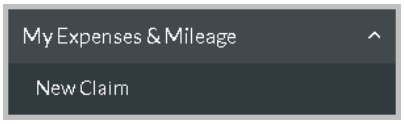
Once a claim has been authorised it **cannot** be changed

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

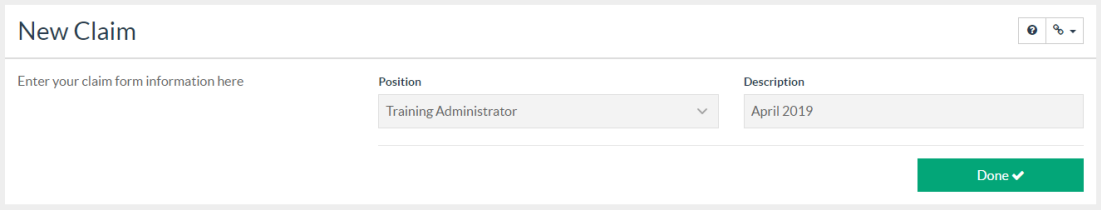
After uploading copies of receipts it is recommended that you retain the paper receipts for your own records

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**



- Click **Done**

Adding an Expense Claim Line:

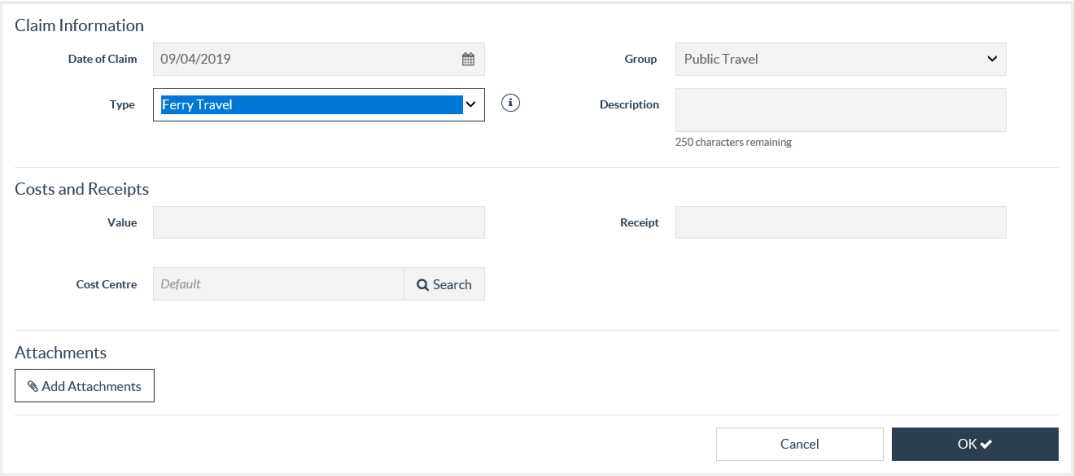
- Read the on-screen guidance, which will assist you in completing the claim
- Click on **Add Line**

- 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:



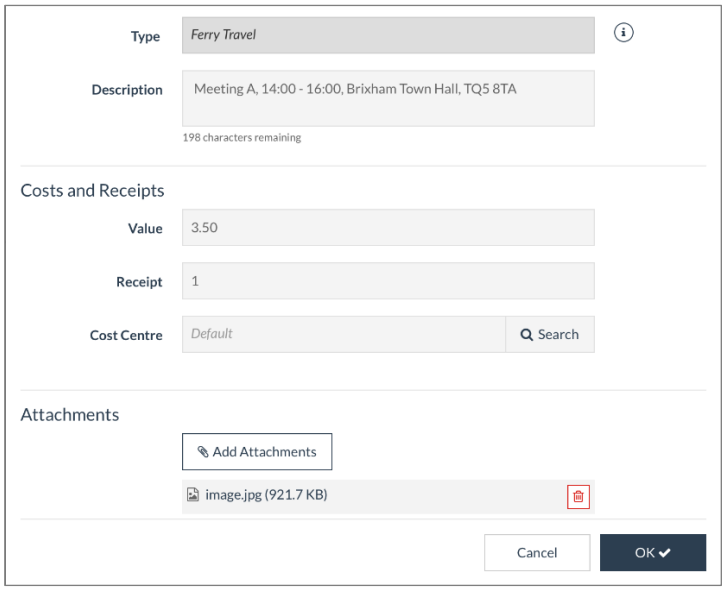
- Add a full and meaningful **Description** to enable the authoriser to identify the reason for the claim.
- Enter the **Value** of the expense
- Leave the **Cost Centre** code as **Default**, unless you have been advised to provide an alternative code for your claim
- Number your paper receipt and enter 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

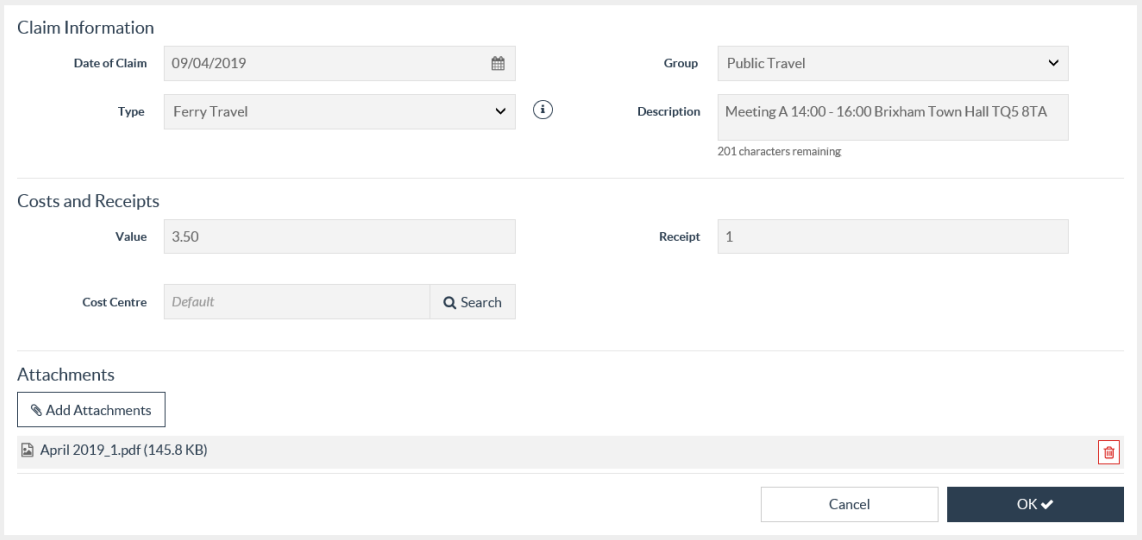
- If you are happy with the photo select **Use Photo** to upload it to MyView, where it will show as an image file



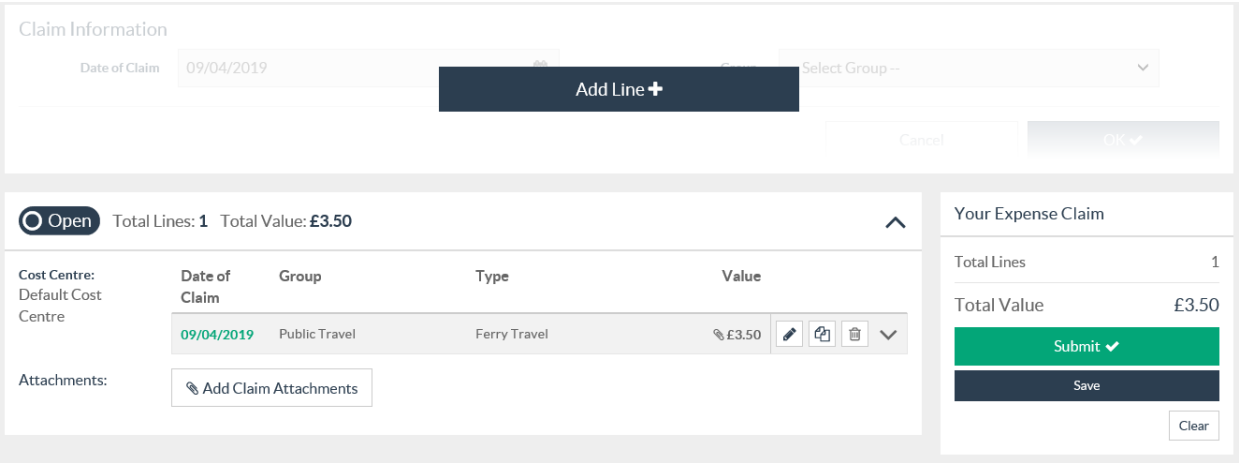
PC/laptop:

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



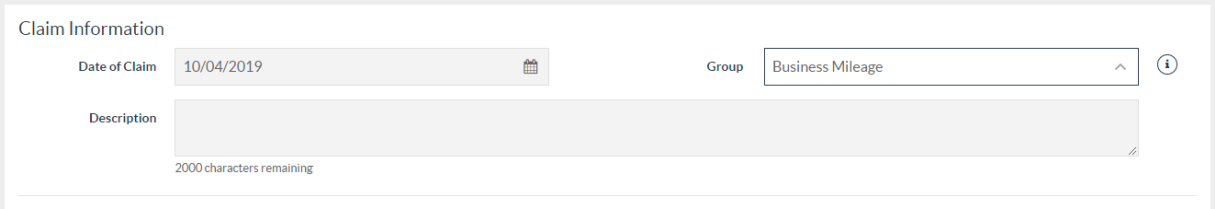
- Now all the boxes are complete, click **OK**. The line you have added now appears on the screen in the **Open** state



- 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:



- 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

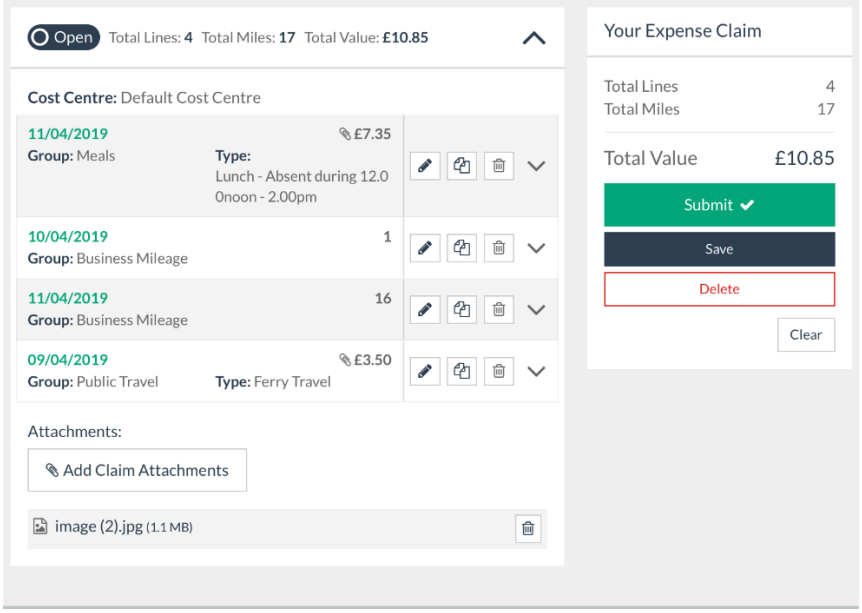
Adding Claim Attachments

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:

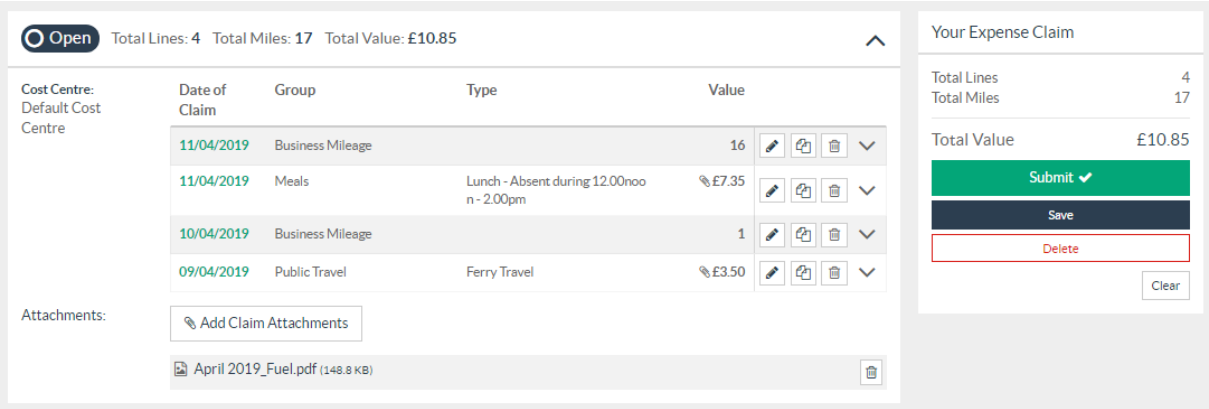
- Select **Take a Photo**. When your tablet/phone camera opens, take a photo of the receipt and select **Use Photo** to upload it to MyView, where it will show as an image file
- Click **Save**



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

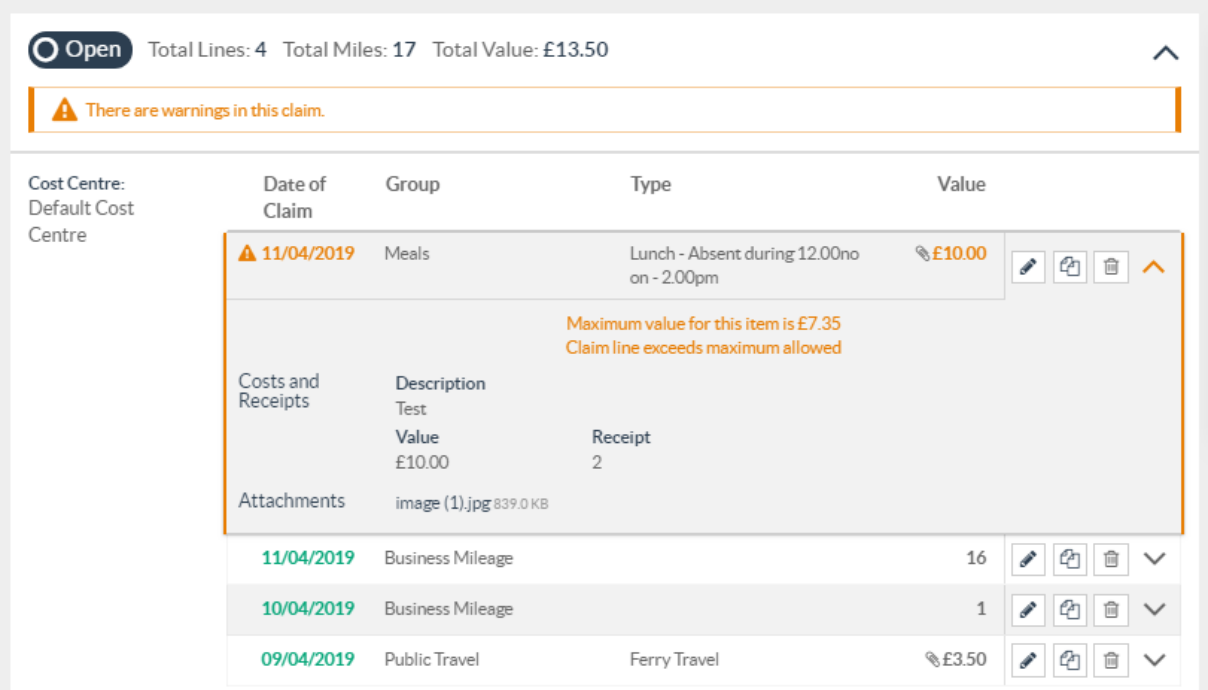


Note: A fuel receipt covering more than one mileage claim should only be uploaded as a **Claim Attachment** against the first claim. For the second and subsequent claims the fuel receipt applies to, please attach a document referencing the original mileage claim number and date

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 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

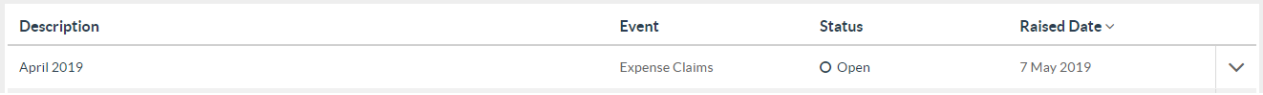
Saving and Submitting the Claim

When you have finished adding claim lines:

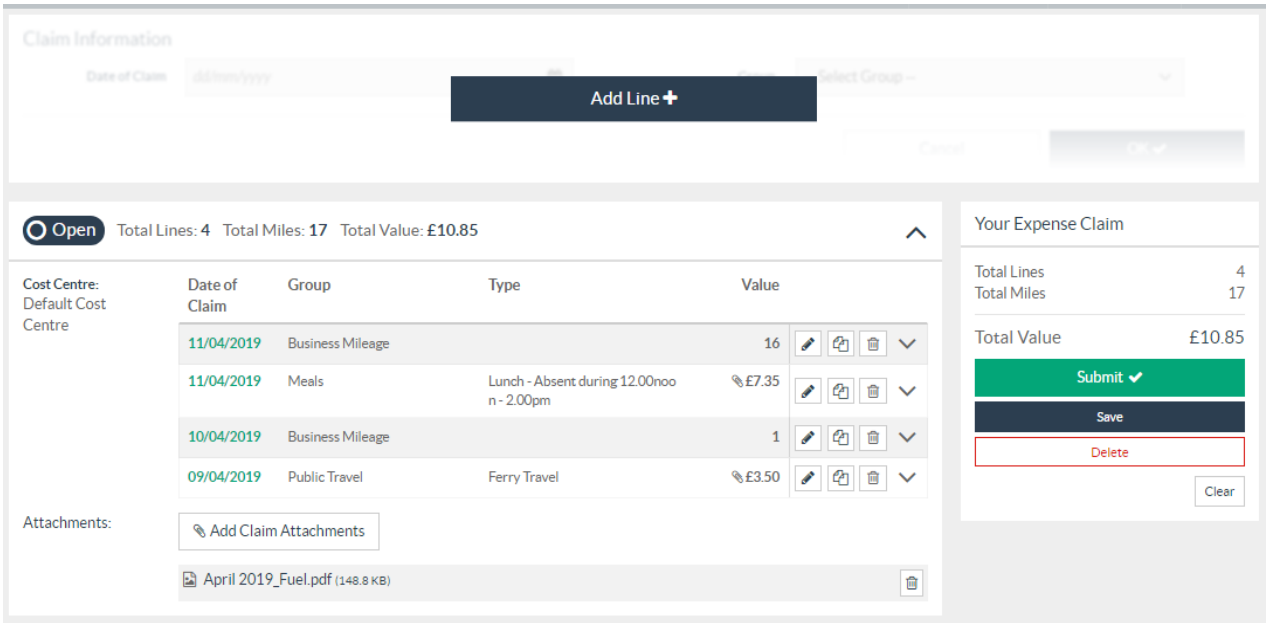
- Click **Save** – if you want to come back to it later to add more items
- Click **Submit** – if you want to submit the claim for authorisation and payment

Re-opening an Expense Claim

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



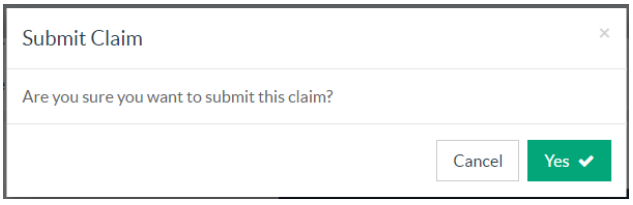
- Claims with **Open** or **Rejected** status can be re-opened for further editing or deletion
- Claims with **Submitted** status can be **Withdrawn** for further editing or deletion
- In each case, click on the Claim Description i.e. **April 2019** to edit/ delete the claim



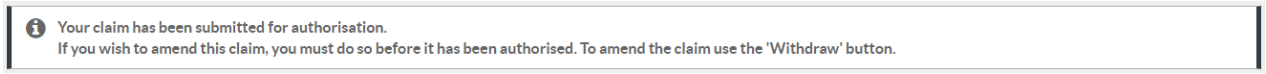
- Click on Add Line to add a new claim line
- Edit, copy or delete an existing line by clicking on the **pencil**, **document** or **recycle bin** icon respectively
- To delete the whole claim click on the **Delete** button

Submitting an Expenses Claim

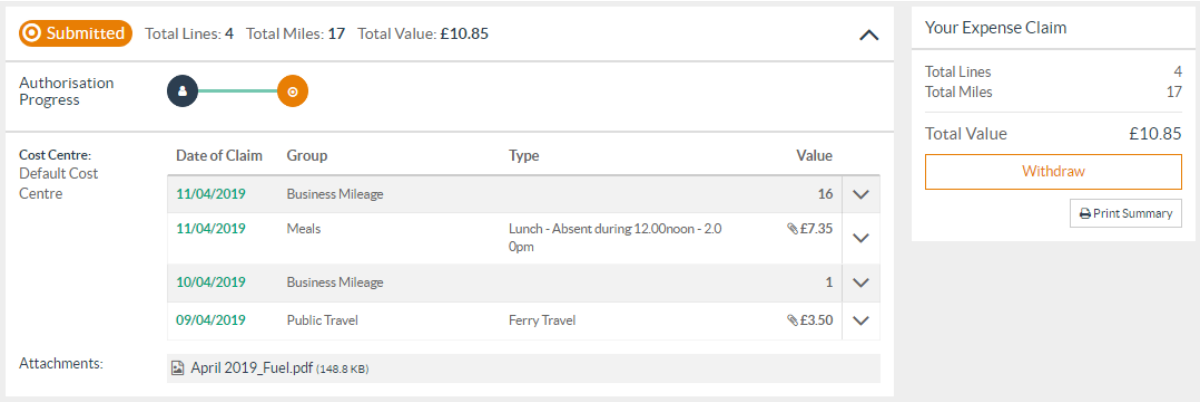
- Click the **Submit** button when the claim is ready to be sent for authorisation



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



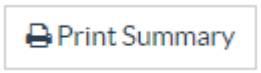
- A **submitted** expenses claim is displayed with a **submitted** logo



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



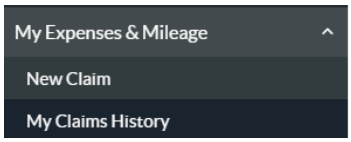
Authorisation of your Claim

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)

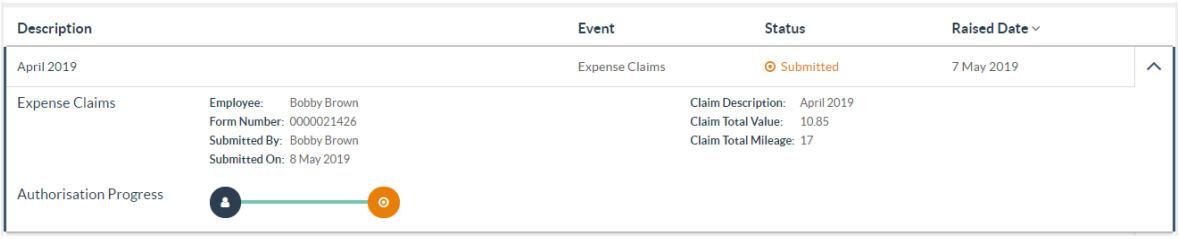
Once actioned you will receive a confirmation email to let you know if the claim form has been Authorised or Rejected

My Claims History

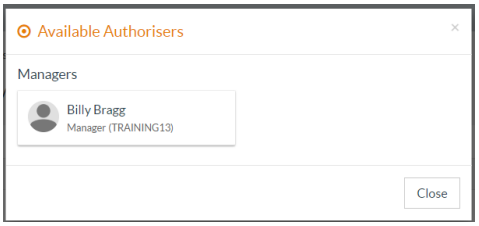


This screen lists a history of your Expense claims

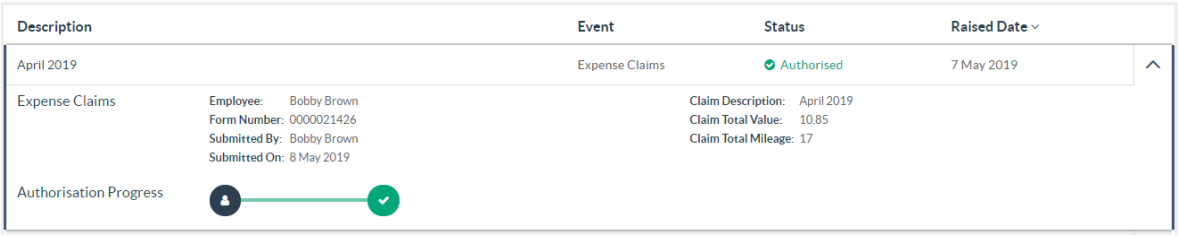
- Click on **My Expenses & Mileage** then **My Claims History**
- For a summary of a claim, including authorisation progress click the **down-arrow** at the far right of the claim:

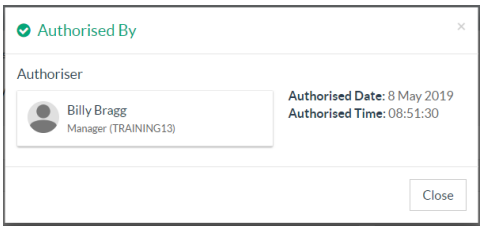


- The coloured dots supply information about the authoriser



- Once authorised:





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.