Employee MyView Expenses Claim Process

Sign into MyView

Create Claim

Need to add to Claim

Claim Completed

Save

Submit

Receipts for fuel and expenses < £25

Receipts for expenses >£25

Keep for 5 Years

Send to Authorisor

Claim Sent to Authoriser

Claim Rejected

Claim Accepted

Amend

Awaiting Processing

Paid on the Next available Pay day

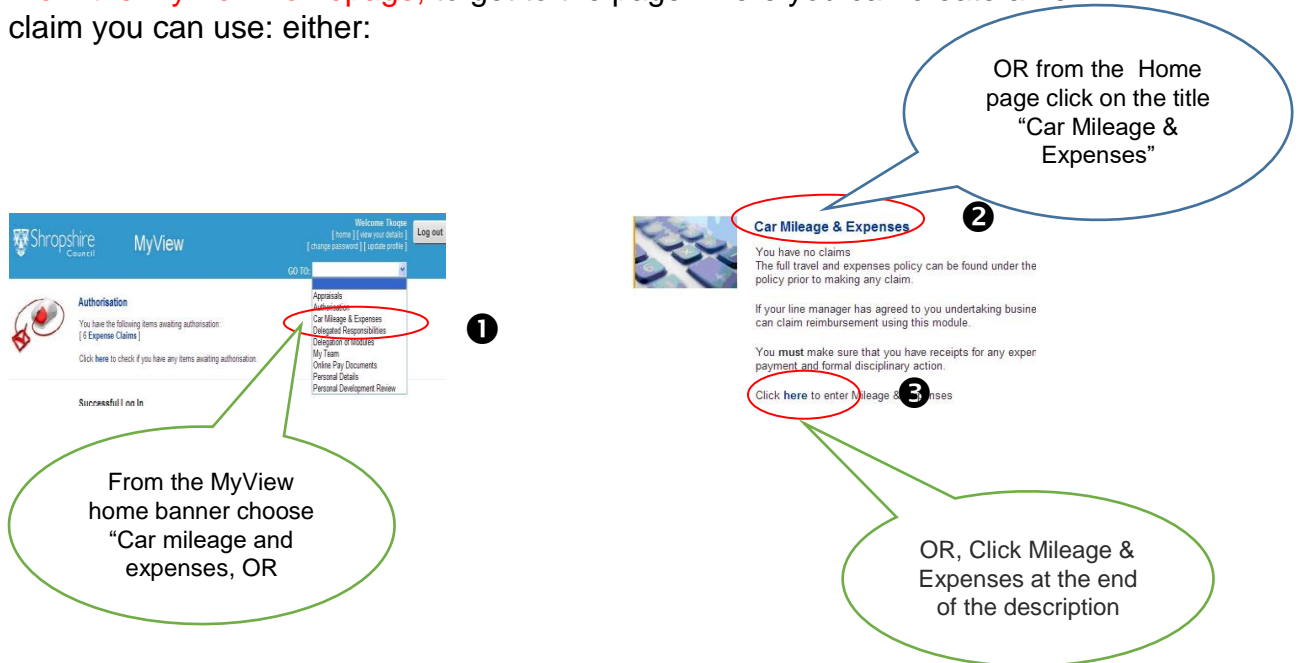# Employee MyView Expenses Claim Process

Read this guidance in conjunction with the Travel and Expenses Policy, which can be found on the Intranet.

Getting Started

Expenses claims must be input via MyView. MyView can be accessed from the link on the Shropshire Council Intranet Homepage or from www.shropshire.gov.uk/myview

To log into MyView for the first time, contact HR Employment Services who will set you up. Telephone number 01743 252190

From the MyView homepage, to get to the page where you can create a new claim you can use: either:

OR from the Home page click on the title "Car Mileage & Expenses"

❷

❶
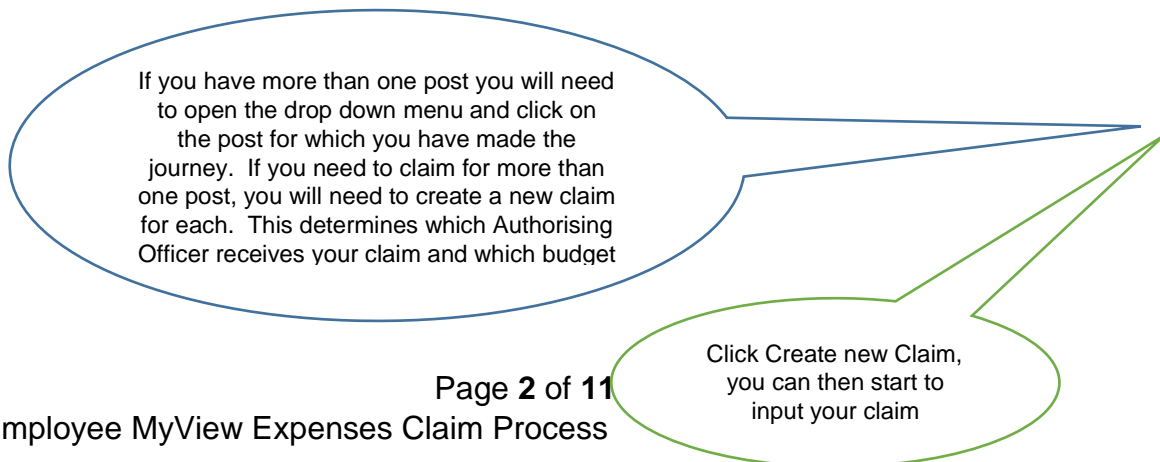
From the MyView home banner choose "Car mileage and expenses, OR

OR, Click Mileage & Expenses at the end of the description

❸

Generating a Claim

INSERT A PICTURE OF THE BOTTOM OF THE SCREEN.

If you have more than one post you will need to open the drop down menu and click on the post for which you have made the journey. If you need to claim for more than one post, you will need to create a new claim for each. This determines which Authorising Officer receives your claim and which budget

Click Create new Claim, you can then start to input your claim

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e.g.

Mr Arty is employed as an architect for Manager Mr Sketchit and has undertaken business journey's for the period 12/04/2011 to 28/04/2011, However he has been involved in a special project building a Scouts hut which is being project managed by Mr Baden-Powell, during April this required business journey's for the period 20/04/2011 to 28/04/2011. Mr Arty will need to create **two** new claims both against his current post

The entry in this box for each claim will therefore be:

"Mr Sketchit 12/04/2011 to 28/04/2011"

And on the other claim:

"Mr Baden-Powell 20/04/2011 to 28/04/2011

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Completing the Claim Form

Overtype 'New Claim' with the name of the manager responsible for the work in which you incurred the travel/expenses. The AO responsible for this post will authorise **all** your travel claims irrespective of who you did the work for. If you have been working on a number of projects, managed by a different person, you will need to create a claim form for each manager and enter their names in this box. This will help the AO reconcile your claim and authorise your payment. **ALSO** enter the period of the claim

Make sure the post relates to the claim

The date of the journey being claimed.

Position	Clerical Assistant
Description	New Claim

Mileage [help]

Journey

Date	Vehicle	Journey	Mileage
	- Select -	- Select -		[+]

Actual mileage travelled	Private Miles	Type
		- Select -

Start Time	End Time	Journey Start From	Calling At	Journey End At	Reason For Journey

Expenses (All) [help]

	Date	Value
- Select -		

Total for Expenses (All)	0.00

GRAND TOTAL	

[Back] [Reset] [Save] [Submit]

Leave blank

Drop down menu for the cc of your engine

A reminder of the details required is held within the [help] on the form.

e.g.
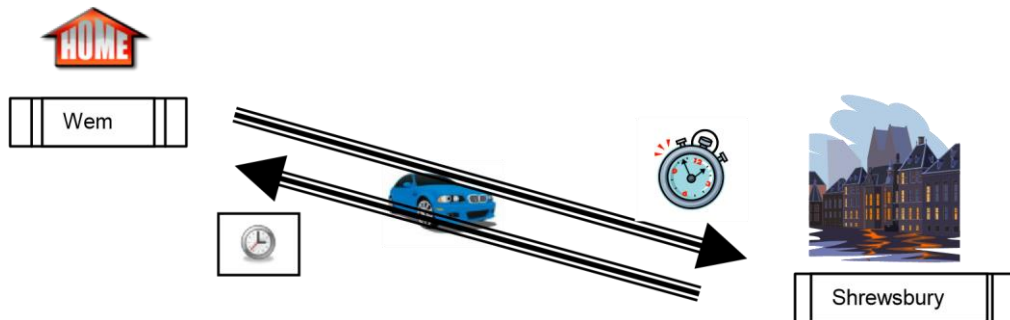
~~In the above example the person left home in Wem at 12:55 to visit a place of work in Shrewsbury to audit some departmental accounts and when they finished they returned home for 15:00.~~

An employee travels from home to Shirehall (their contractual work base) a 10 mile non work commute, these are private miles. The journey from Shirehall to home is a 10 mile non work commute, these area also private miles. Total private miles is 20 miles.

During the day they travel 4 miles to a meeting and 4 miles back to the Shirehall. They travel home as normal at the end of the working day. They will be able to claim 8 business miles.

The entry on the form would include postcodes:

Position   Clerical Assistant
Description Mr Bloggs - 01.01.2012 - 31.01.2012

Mileage   [help]
Journey

Date	Vehicle	Journey	Mileage
03/01/2012	12001500	- Select -	40

Actual mileage travelled	Private Miles	Type
50	10	01 LOCAL - MAIN RATE

Start Time	End Time	Journey Start From	Calling At	Journey End At	Reason For Journey
12:55	15:00	Home (Wem)	Shrewsbury	(Wem)	Auditing Accounts

Full amount of mileage travelled from the start to the end of the journey – including any private miles 28

Refers to the commute from home to the contractual work base and home. Private miles cannot be claimed. Enter the number of miles that you would travel to/from work. If the journey is between two workplaces, this can be left blank. 20

This will default from your payroll record

Automatically calculated for you. This is the number of miles you will be paid for. 8

Employee M... ...ocess

of 1

Position   Clerical Assistant
Description   Mr Bloggs - 01.01.2012 - 31.01.2012

Mileage   [help]
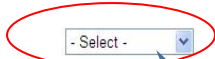
Journey

Date	Vehicle	Journey	Mileage	
03/01/2012	12001500	- Select -	40	[+]

Actual mileage travelled	Private Miles	Type	
50	10	01 LOCAL - MAIN RATE	

Start Time	End Time	Journey Start From	Calling At	Journey End At	Reason For Journey
12:55	15:00	Home (Wem)	ALD Shrewsbury	Home (Wem)	Auditing Accounts

Enter the start and end time of the journey, using the 24 hour clock, ie 07:30, 15:15

Enter the address including postcode

Enter the address including the postcode

Enter all of the addresses of the places visited. This field holds 250 characters. If this is insufficient you will need to split the journey between a number of separate lines. You can add another line by clicking on the [+] on the right-hand side of form. Once a line has been completed this will change to [-]. If you subsequently click on [-] this it will delete the whole line of entry.

Reason for the journey, client/course name,

You must ensure that you enter all the relevant details to enable your authorising officer to be satisfied that the journey was; necessary, carried out and that the number is an accurate amount of miles claimed in accordance with the Council's Travel and ~~Subsistence~~ Expenses Policy. If this is not the case your claim will be sent back to you without payment for correction. This may delay payment.

NB: Please also note that by submitting the claim you are also verifying that you have valid insurance for business use, an appropriate driving licence and valid MOT certificate if applicable.

This information is also required for auditing purposes and to ensure compliance with relevant legislation.

Expenses

Once you have chosen the expenses type you cannot change it. If it is incorrect you will need to delete the whole line using the [-] box.

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Position	Clerical Assistant
Description	Mr Bloggs - 01.01.2012 - 31.01.2012

Mileage

Journey

Date	Vehicle	Journey	Mileage
03/01/2012	12001500	- Select -	40

Actual mileage travelled	Private Miles	Type
50	10	01 LOCAL - MAIN RATE

Start Time	End Time	Journey Start From	Calling At	Journey End At	Reason For J
12:55	15:00	Home (Wem)	ALD Shrewsbury	Home (Wem)	Auditing Accou

Expenses (All)

	Date	Value		Receipt	
Parking	03/01/2012	4.50		Y	[-]
		Description	Frankwell car park meeting at Guildhall		
Stationary	03/01/2012	27.50		01	[-]
		Description	Photocopying of accounts ledger and receipts		

- Select -

Total for Expenses (All)	32.00

Keep in your own records

Attach to the Summary sheet and send to your authorising officer

❶
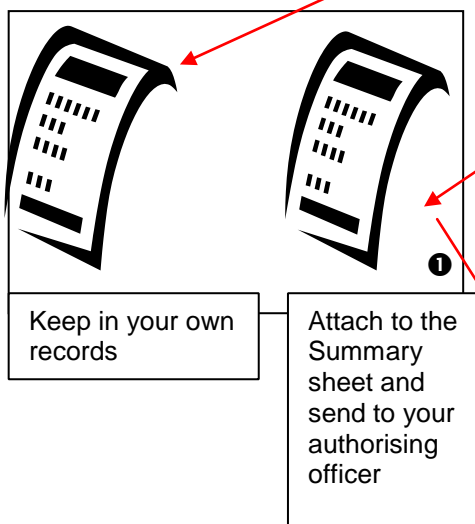
Expense Claims Claim Form Summary

Employee Number	0773069
Employee Name	A SMITH
Claim Number	0000001283
Claim Date	01/02/2012

Claim for the following:
EXPENSES SUMMARY
All figures in this claim are in Sterling
Expenses (All)

32.00

TOTAL VALUE OF CLAIM: 32.00

MILEAGE SUMMARY

TOTAL MILEAGE: 40

Expenses Link
Expenses guidance for employees
Expenses guidance for managers
Test Captivate

[Print] [Continue]

Receipts

Each travel claim **must** be supported by a valid fuel VAT receipt obtained before the date of the first journey claimed.

You **MUST** have a receipt to be able to reclaim **ANY** business expenses.

Receipts **must** be stored and retrieved in their original paper format.

For any item that has a value of **less than £25.00**, input a "Y" into the 'Receipt' box to indicate that you are storing a receipt to cover this

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expenditure. You **must** store the receipt for three years from the date of the receipt. If you do not have a receipt then enter "N" into the 'Receipt' box and give a reason in the "Description" box.   **Warning ! -** If the authoring officer is not satisfied with the explanation the whole claim may be rejected.

For items that are £25.00 and over, you must forward the receipt to the Authorising Officer who will retain for three years from the date of the receipt. Please therefore number each receipt chronologically starting with 01, 02, 03 etc, this makes it easier for the Authorising Officer to match receipts and claims. Enter the number you allocated to the receipt into the "Receipt" box. When you have submitted your claim print a copy of the 'summary sheet', write the claim number on the receipt, staple the receipt to the back of the summary and forward it to your authorising officer.
Your claim will not be authorised until the authorising officer has received your receipt.

Description

You will need to provide the authorising officer with enough information to justify your expenditure. Meals will only be reimbursed when an overnight stay has taken place. You must include the start and end time of your absence from your normal place of work as this is required to verify what can be paid.

e.g.

"Overnight stay at conference left 05/01/2012 at 17:00 returned 06/01/2012 at 09:00"

After Completing the Form

Do not select this unless you wish to delete the whole form and be returned to the MyView main menu

This will clear all the entries you have made on this form but will keep the form for you to start inputting again.

It you want to add further travel or expenses lines before sending to your authorising officer then you can click on "Save".

You can press submit without saving your claim first. When you do not need to add any further details to your claim, you can click on your saved claim in the "Open" Section of MyView and then Submit.

Once you have submitted your claim form you may withdraw it at any time (should you wish to change anything on it), until the authorising officer has authorised your claim.

When your claim is authorised you will receive an e-mail to confirm that your claim has been passed for payment. You can check when the claim will be paid by looking up the date on the table held on the HR website, by cross

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reference the date it was authorised. This date will be the date that the e-mail was sent.