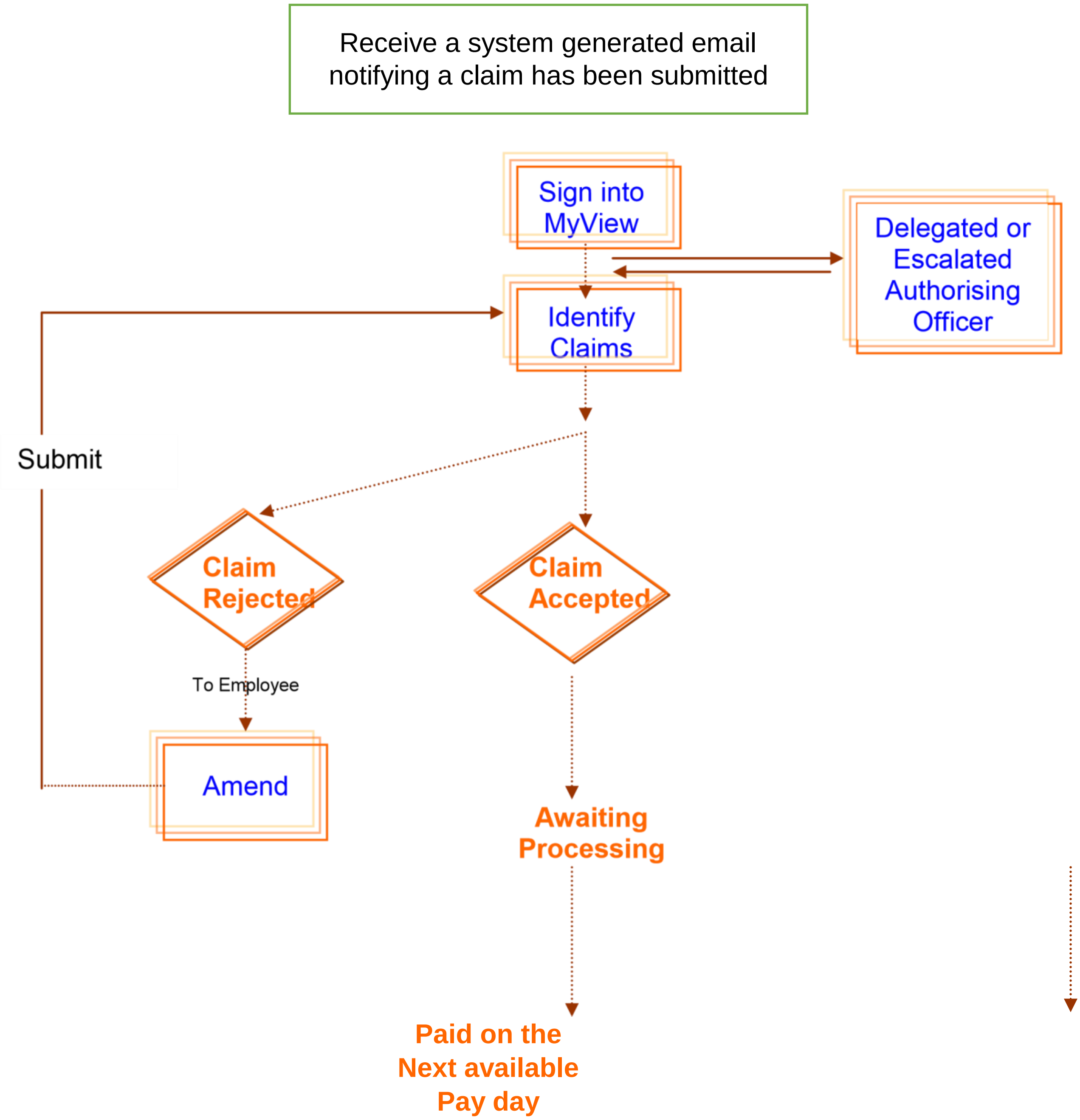
Authorising Officer MyView Expenses Claim Process



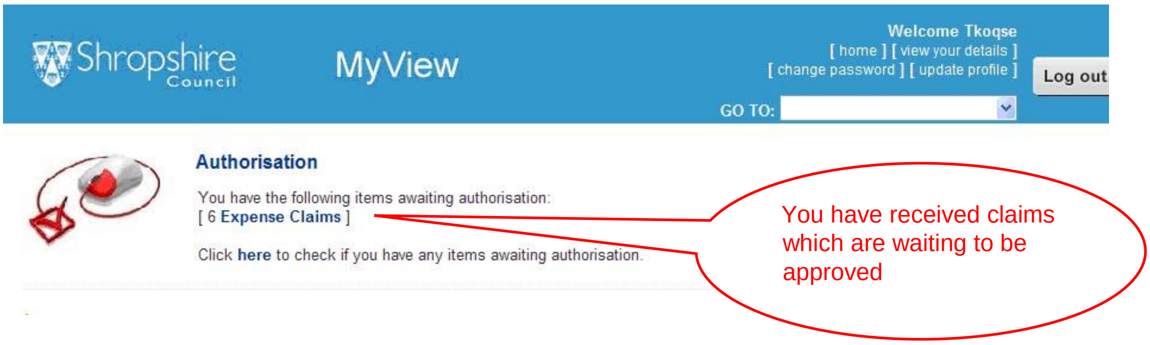
Authorising Officer – MyView Expenses Claim Process

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

Getting Started

The Authorising Officer will receive a system generated email to their registered work email account when a team member has submitted a claim.

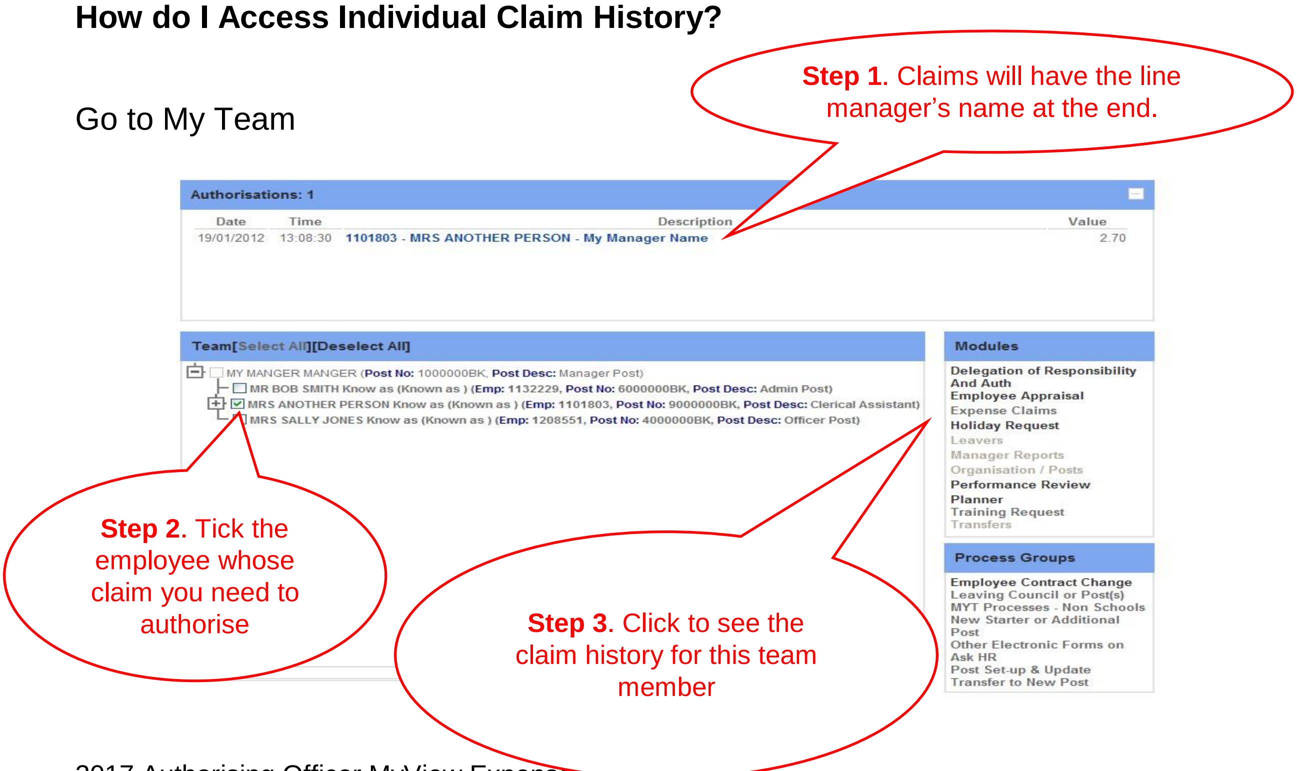
Only an Authorising Officer for MyView will have the authorisation module listed on their MyView dashboard. Submitted claims awaiting authorisation are shown (see below).



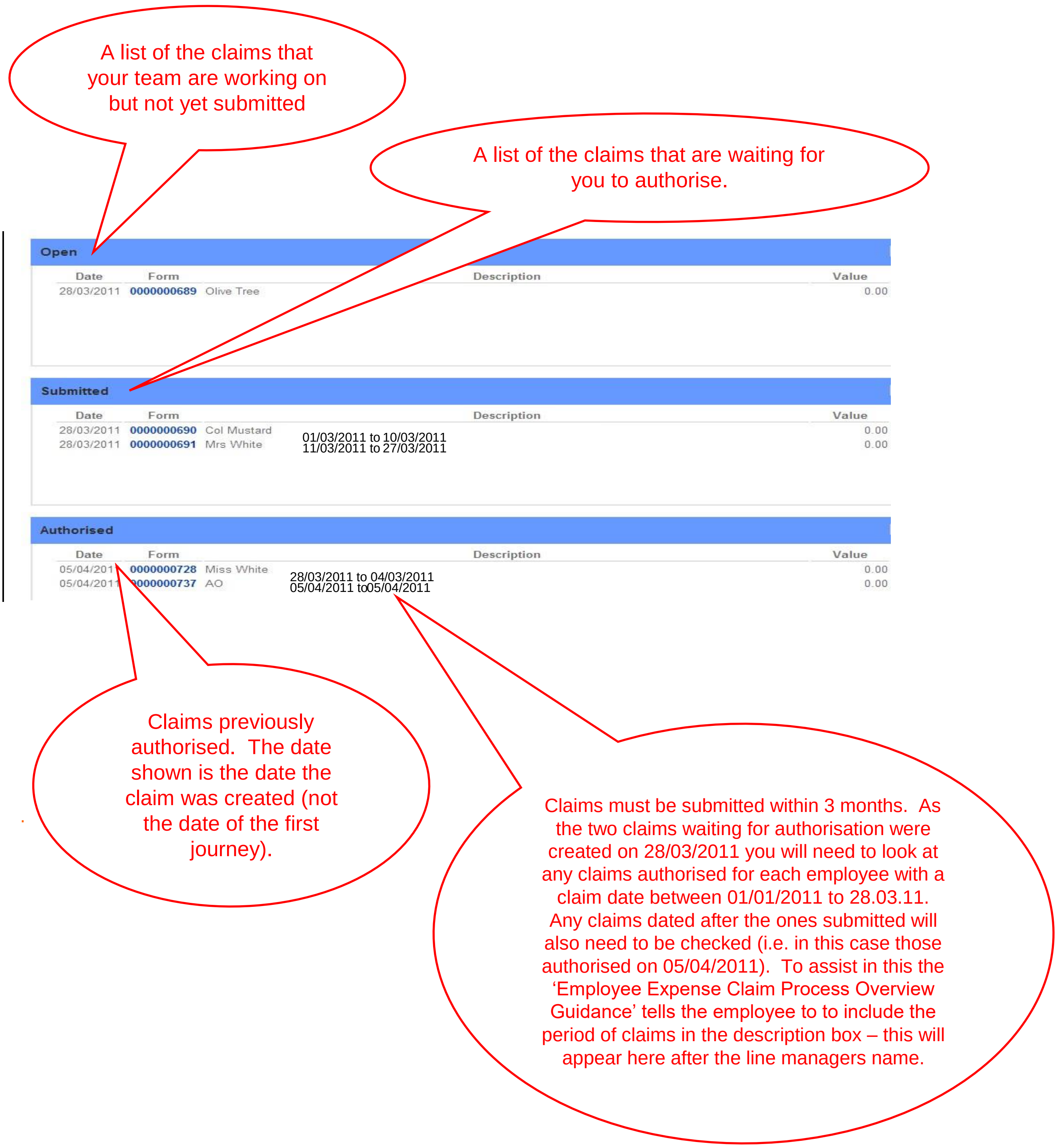
Part of the authorisation process requires you to check for duplicate claims (either accidentally or fraudulently). Do **NOT** click on any of the links. These take you direct to the claims. Before authorising any claim you **MUST** satisfy yourself that any claim does not contain any journey or expense from a previously paid claim. The MyTeam section of MyView provides you with the employee's claims history for you to check.

How do I Access Individual Claim History?

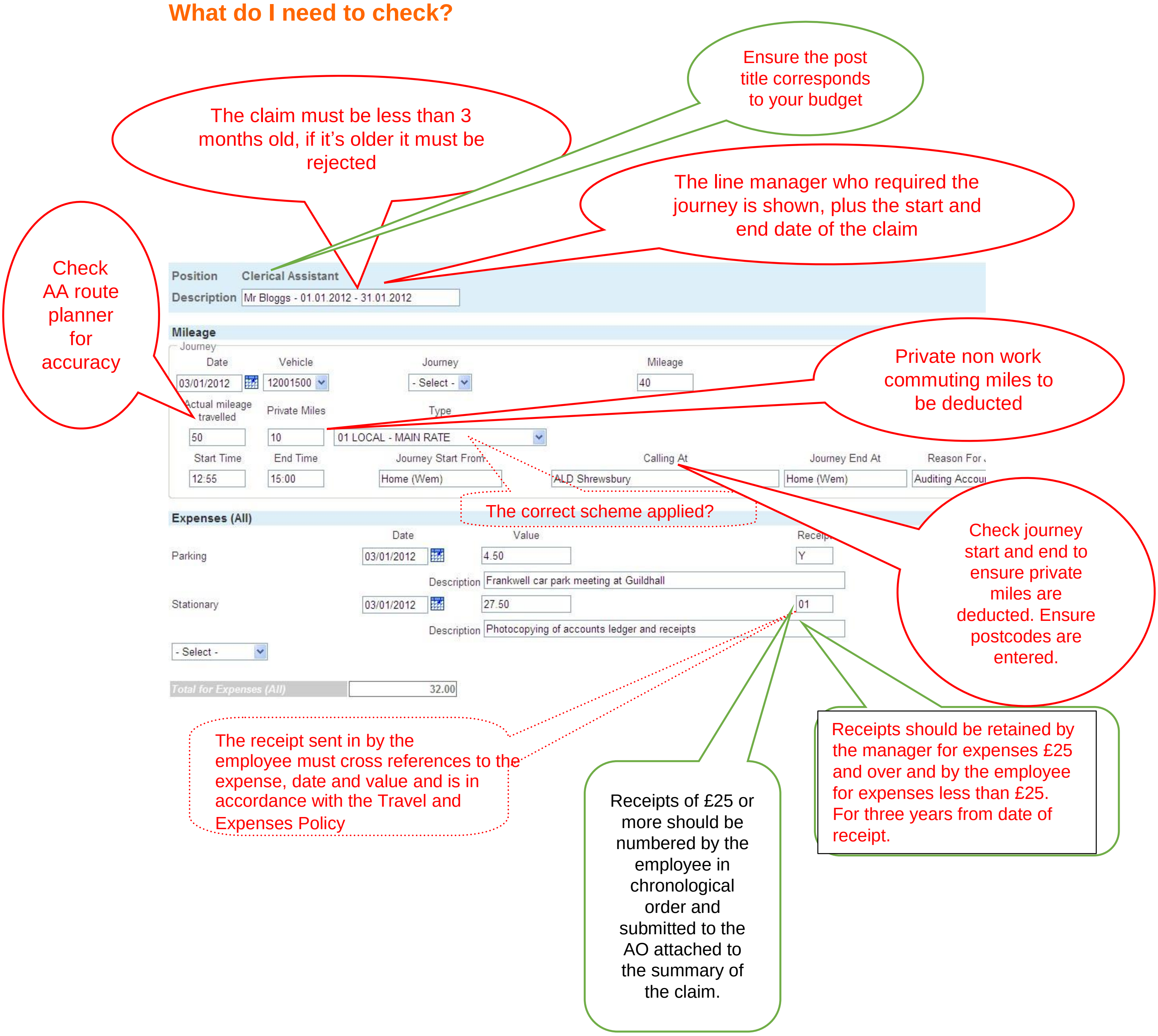
Go to My Team



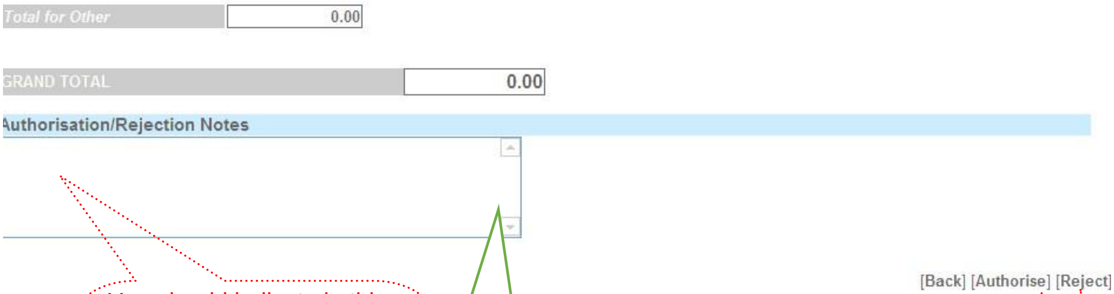
It is the Authorising Officers responsibility to ensure that a submitted claim does not contain any payment already authorised. You will need to go into any claim which may contain a duplication to ensure you do not authorise payment again. Failure to do so could result in disciplinary action being taken against you.



What do I need to check?



What happens when I have finished checking?



You should indicate in this notes field the reason for rejecting the claim and any action the employee needs to take before resubmitting.

If you agree with the claim press authorise, A message will appear, click 'OK'. This claim will then disappear from your authorise list and an email will be sent to your team member to let them know it has been sent for payment

Is the claim within 3 months?
Is it a duplicate claim?
Is the mileage accurate?
Have private miles been deducted?
Has a receipt been submitted if £25 or over?
Are the descriptions accurate – does it clearly show start and end locations with postcodes for the journey?

If you have any queries in relation to the form or receipts required, reject it. A message will appear, click OK.

If you do not authorise a claim within 5 calendar days of it being submitted, it will be transferred up to **your** line manager to authorise.

Receipts

The employee must send a VAT receipt to their Authorising Officer for any single expense of £25.00 or over. The employee will staple the receipt to a copy of the summary sheet. The Authorising Officer must cross reference the receipt to the claim and keep for a period of 3 years from the date of the receipt and provide them for inspection at any time for audit purposes.

Receipts of less than £25 should be retained by the employee and periodically checked by the Authorising Officer.

If an employee leaves the Council they must provide their receipts to their Authorising Officer to ensure the correct retention period.

NB: Receipts **<u>must</u>** be stored and retrievable in their original paper format.