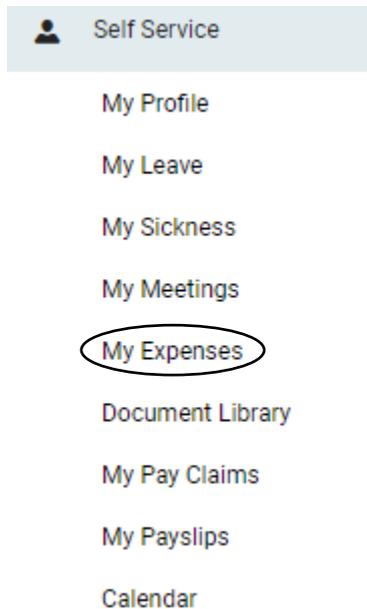


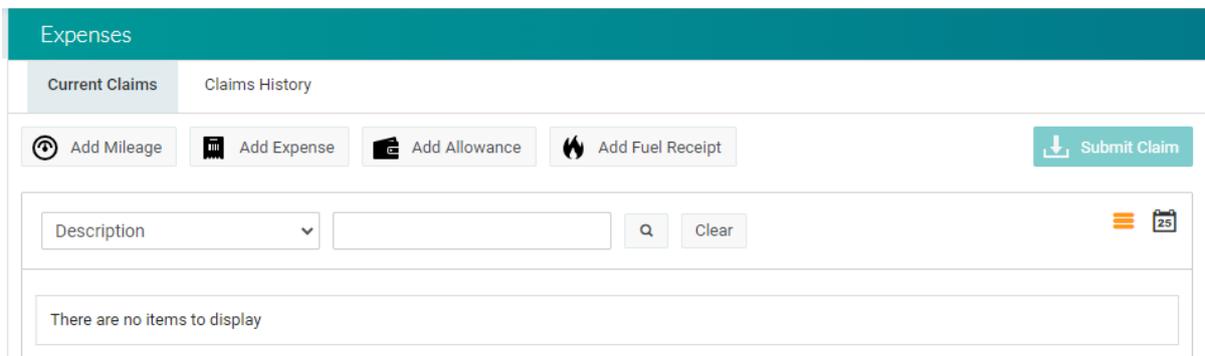
# HOW TO ADD MILEAGE AND EXPENSES CLAIMS

(These notes have been created to assist you putting on a claim, If, they do not flow or do not make sense, let me know as I have based them on doing a dummy claim)

In Access, click on Self Service, My Pay Expenses



You will be taken into the screen shown below



To the right hand of this screen, you should be able to view your car details and Driving Licence information. PLEASE REMEMBER YOU WILL NOT BE ABLE TO ADD A MILEAGE CLAIM WITHOUT THIS INFORMATION BEING ADDED. If you need any assistance with this area, please come and see me.

Select one of the relevant tabs (ie Add Mileage, Add Expense, Add Allowance) . The Add fuel Receipt is to be used for any receipt not just fuel.

## **ADD MILEAGE**

Enter as much information as you can on the right hand side of the screen. If you have registered more than one vehicle, please use the drop down box next to Vehicle to select the registration used.

✕
Mileage

Date* <input type="text" value="28/08/2024"/>	Vehicle* <input type="text" value="OV64NBK"/>	
Purpose <input type="text" value="Pupil Visit"/>	<input type="button" value="Enter journey details"/>	
Description* <input style="width: 100%;" type="text" value="attended Ashmead School for Pupil Visit"/>	<input type="button" value="Recall a favourite journey"/>	
Client <input style="width: 100%;" type="text"/>	<input type="button" value="Select a GPS tracked journey"/>	
Project <input style="width: 100%;" type="text"/>		

Mileage Scheme* <input type="text" value="AMAP Mileage Scheme"/>	Journey Miles <input type="text" value="0"/>	Miles Claimed <input type="text" value="0"/>	Commute <input type="text" value="0.0"/>
Value of Claim <input type="text" value="£0"/>	CO2 Emissions <input type="text" value="0kg"/>	<input type="button" value="Memorise Journey"/>	<input type="button" value="Map"/>

You will now need to click on the Enter Journey details field, once you do this you will see this page for completion. For one off journeys go down to My Locations, enter the post code where you are leaving from, which is probable the School Post code, click on add to the right hand side, then enter Post code of the address you are travelling to, click on add and the Post code you are returning to. You can see that each journey, there is a line added, detailing distance for each leg of the journey. Then down the bottom it will show the total of miles being claimed along with the value of the claim.

✕
Mileage

Date* <input type="text" value="28/08/2024"/>	Vehicle* <input type="text" value="OV64NBK"/>							
Purpose <input type="text" value="Pupil Visit"/>	<div style="border: 1px solid #ccc; padding: 5px;">             Standard Locations              Group <input type="text"/> Location <input type="text" value="Choose.."/> <input type="button" value="Add"/> </div>							
Description* <input style="width: 100%;" type="text" value="attended Ashmead School for Pupil Visit"/>	<div style="border: 1px solid #ccc; padding: 5px;">             My Locations              (New) <input type="text"/> Postcode <input style="border: 2px solid #008080;" type="text"/> Passengers <input type="text" value="0"/> <input type="button" value="Add"/> </div>							
Client <input style="width: 100%;" type="text"/>	Please enter a location above							
Project <input style="width: 100%;" type="text"/>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;"> <input type="checkbox"/> Westfield  <small>Westfield, Aylesbury, HP21 9ET</small> </td> <td style="text-align: right; padding: 5px;">✕</td> </tr> <tr> <td style="padding: 5px;"> <input type="checkbox"/> Cole Road  <small>Cole Road, Aylesbury, HP21 8SU</small> </td> <td style="text-align: right; padding: 5px;">1.4 Miles ✕</td> </tr> <tr> <td style="padding: 5px;"> <input type="checkbox"/> Westfield  <small>Westfield, Aylesbury, HP21 9ET</small> </td> <td style="text-align: right; padding: 5px;">1.4 Miles ✕</td> </tr> </table>		<input type="checkbox"/> Westfield <small>Westfield, Aylesbury, HP21 9ET</small>	✕	<input type="checkbox"/> Cole Road <small>Cole Road, Aylesbury, HP21 8SU</small>	1.4 Miles ✕	<input type="checkbox"/> Westfield <small>Westfield, Aylesbury, HP21 9ET</small>	1.4 Miles ✕
<input type="checkbox"/> Westfield <small>Westfield, Aylesbury, HP21 9ET</small>	✕							
<input type="checkbox"/> Cole Road <small>Cole Road, Aylesbury, HP21 8SU</small>	1.4 Miles ✕							
<input type="checkbox"/> Westfield <small>Westfield, Aylesbury, HP21 9ET</small>	1.4 Miles ✕							

Mileage Scheme* <input type="text" value="AMAP Mileage Scheme"/>	Journey Miles <input type="text" value="2.8"/>	Miles Claimed <input type="text" value="2.8"/>	Commute <input type="text" value="0.0"/>
Value of Claim <input type="text" value="£1.26"/>	CO2 Emissions <input type="text" value="1kg"/>	<input type="button" value="Memorise Journey"/>	<input type="button" value="Map"/>

If you are going to do certain journeys on a regular basis, you can click on memorise journey, this will give you the option of naming this route ( ie BP – Ashmead – BP).

Then the next time you do this journey, just go back into adding mileage claim, on the right hand side you will see Journeys Locations – Show all.

Unsubmitted Total **£1.26**

 Mileage	<b>£1.26</b>
 Expenses	<b>£0.00</b>
 Allowance	<b>£0.00</b>
 Miles Claimed	2.8 miles

**Journeys** Locations Show All

You have not added any journeys to your favourites

Click on show all and you will see all journeys you have chosen to memorise:

**Favourites**

Favourite Journeys

 **BP - Ashmead - BP**  
2.80 miles ☆ 🗑️

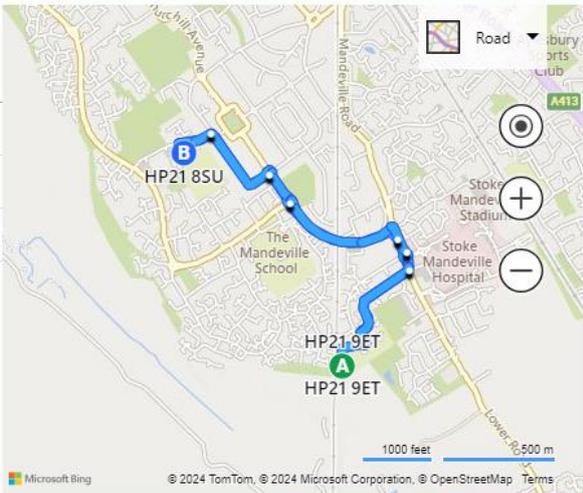
Favourite Locations

When you select one you will see the following:

**Journey**

BP - Ashmead - BP

Location	Address	Miles
Westfield	Westfield, Aylesbury, HP21 9ET	0
Cole Road	Cole Road, Aylesbury, HP21 8SU	0
Westfield	Westfield, Aylesbury, HP21 9ET	0



1000 feet 500 m

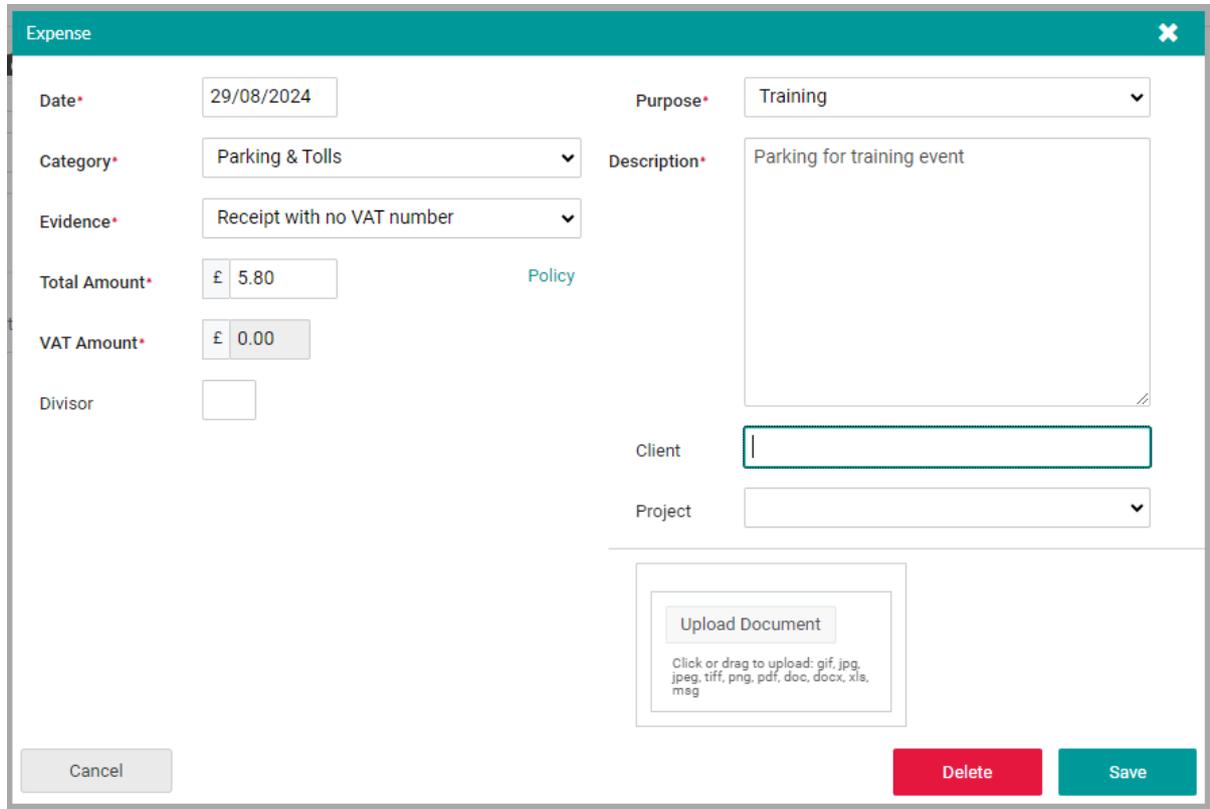
Microsoft Bing © 2024 TomTom, © 2024 Microsoft Corporation, © OpenStreetMap

Delete Use

You can then select use and it will add the journey for you.

## ADD EXPENSES

Complete as much information as you can, see example below:



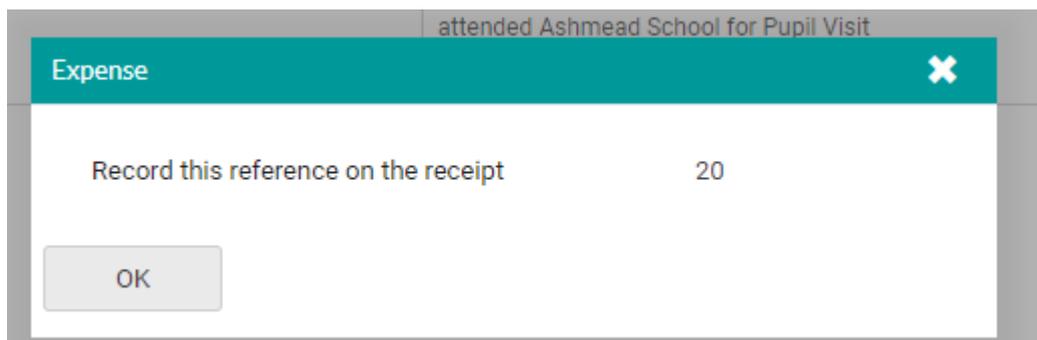
The image shows a screenshot of an 'Expense' form. The form has a teal header with the title 'Expense' and a close button. The fields are as follows:

- Date\*: 29/08/2024
- Purpose\*: Training (dropdown)
- Category\*: Parking & Tolls (dropdown)
- Description\*: Parking for training event (text area)
- Evidence\*: Receipt with no VAT number (dropdown)
- Total Amount\*: £ 5.80 (input field) with a 'Policy' link next to it.
- VAT Amount\*: £ 0.00 (input field)
- Divisor: (empty input field)
- Client: (empty input field)
- Project: (empty dropdown)
- Upload Document: A button with instructions: 'Click or drag to upload: gif, jpg, jpeg, tiff, png, pdf, doc, docx, xls, msg'

At the bottom, there are three buttons: 'Cancel' (grey), 'Delete' (red), and 'Save' (teal).

You can Upload your receipt in the Upload Document field, then press save.

You will see something like this, just make a note of the reference.



The image shows a confirmation dialog box titled 'Expense' with a close button. The dialog contains the text: 'Record this reference on the receipt' followed by the number '20'. At the bottom, there is an 'OK' button.

## ADD ALLOWANCE

This section is used for the following claims:

## EYE TESTS

Allowance ✕

Date\*

Purpose\*

Description\*

Allowance\*

Amount\*

When you select Eye Test from the drop down field, it automatically populates the amount that can be claimed. Click on Save.

## GLASSES REPAIR

Allowance ✕

Date\*

Purpose\*

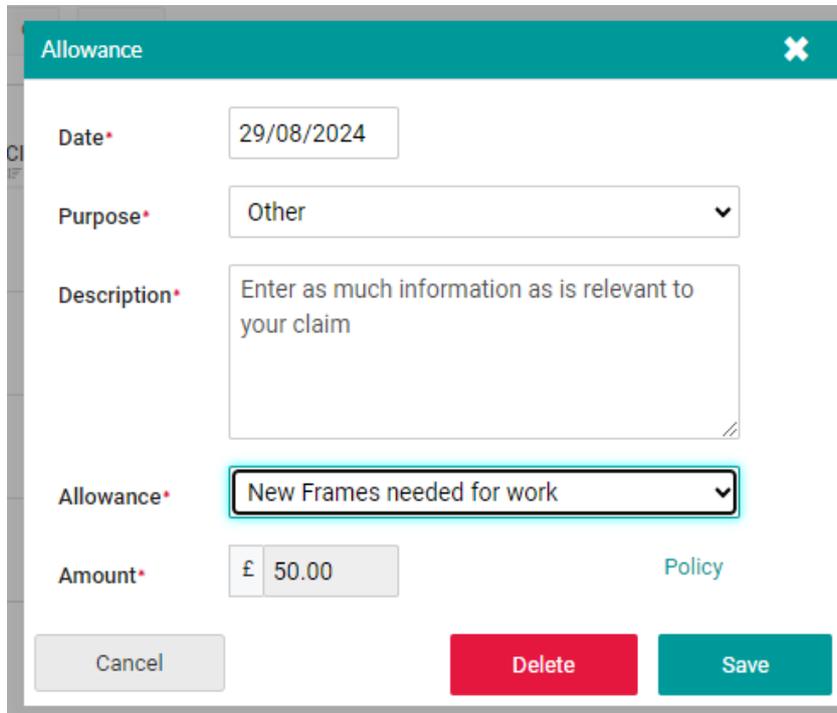
Description\*

Allowance\*

Amount\*

When you select Glasses Repair from the drop down field, it automatically populates the amount that can be claimed. Click on Save.

### NEW FRAMES NEEDED FOR WORK



The screenshot shows a form titled "Allowance" with a close button (X) in the top right corner. The form contains the following fields:

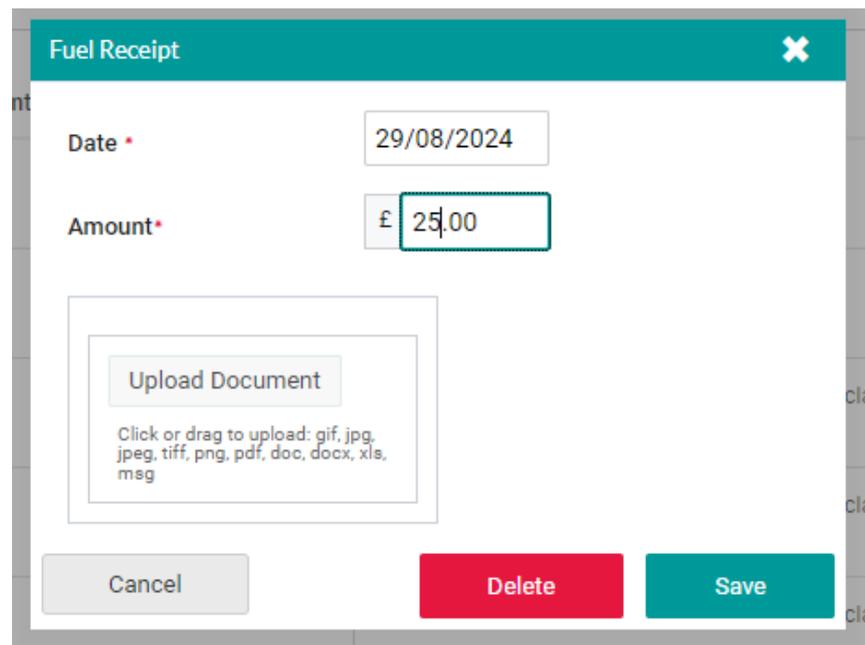
- Date\***: 29/08/2024
- Purpose\***: Other (dropdown menu)
- Description\***: Enter as much information as is relevant to your claim (text area)
- Allowance\***: New Frames needed for work (dropdown menu, highlighted with a red border)
- Amount\***: £ 50.00 (input field)
- Policy**: (text label)

At the bottom of the form are three buttons: "Cancel" (grey), "Delete" (red), and "Save" (teal).

When you select New Frames needed for Work from the drop down field, it automatically populates the amount that can be claimed. Click on Save.

### ADDING A RECEIPT

This can be used for any receipt not just for fuel. Make sure you have already saved your receipts somewhere that you can pick them up easily (ie downloads). Click on save.



The screenshot shows a form titled "Fuel Receipt" with a close button (X) in the top right corner. The form contains the following fields:

- Date \***: 29/08/2024
- Amount\***: £ 25.00 (input field)
- Upload Document**: A section with a button and instructions: "Click or drag to upload: gif, jpg, jpeg, tiff, png, pdf, doc, docx, xls, msg"

At the bottom of the form are three buttons: "Cancel" (grey), "Delete" (red), and "Save" (teal).

Once you have completed adding all claims whether it be Mileage or an actual expense. When you go into Expenses under your self-service you will be taken straight into Current Claims, see example below:

The screenshot shows the 'Expenses' page with a teal header. Below the header are two tabs: 'Current Claims' (active) and 'Claims History'. There are four buttons: 'Add Mileage', 'Add Expense', 'Add Allowance', and 'Add Fuel Receipt'. A 'Submit Claim' button is in the top right. Below these is a search bar with a 'Description' dropdown, a search input, and a 'Clear' button. The main content is a table with the following data:

Date	Ref	Category	Client	Description	Total
28/08/2024		Pupil Visit		attended Ashmead School for Pupil Visit	£1.26
29/08/2024	R00020	Parking & Tolls Training		Parking for training event	£5.80
29/08/2024		Other		Enter as much information as is relevant to your claim	£100.00
29/08/2024		Other		Enter as much information as is relevant to your claim	£50.00
29/08/2024		Other		Enter as much information as is relevant to your claim	£25.00

This will show you everything claim you have added for the current period. If you are happy with what you have added, then you can click on Submit Claim in the top right hand corner. This will then send it through to Authoriser. If they are happy and authorise the claims these will go to Steve Parkinson to Approve ready for Payroll. **Expense claims must also be submitted by 3<sup>rd</sup> of the month following (ie if you are claiming an expense in September, this would need to be submitted by 3<sup>rd</sup> October).**

If you do not click on submit, they will just sit in your account as an Unsubmitted Claim and will not be picked up for Payroll.

The screenshot shows two tabs: 'Submitted Expense Claims' and 'Unsubmitted Expenses'. The 'Unsubmitted Expenses' tab is highlighted in yellow. Below the tabs is a search bar with a 'Type' dropdown, a search input, and a 'Clear' button.