

E-Expenses

Claimant User Guide

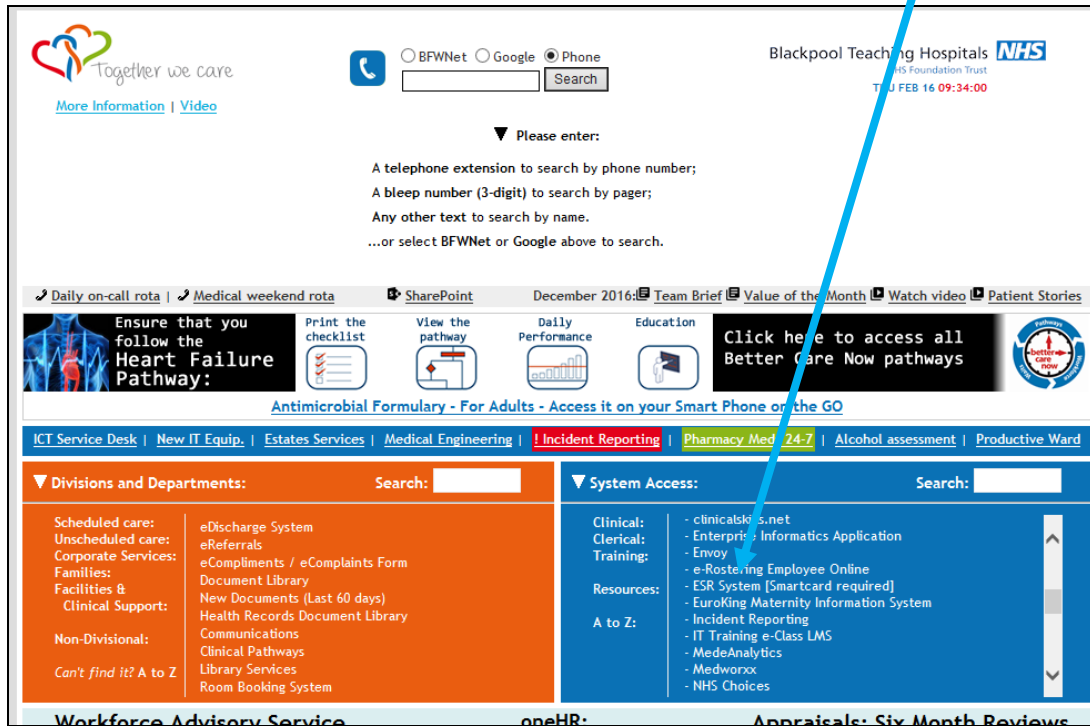


Version 7

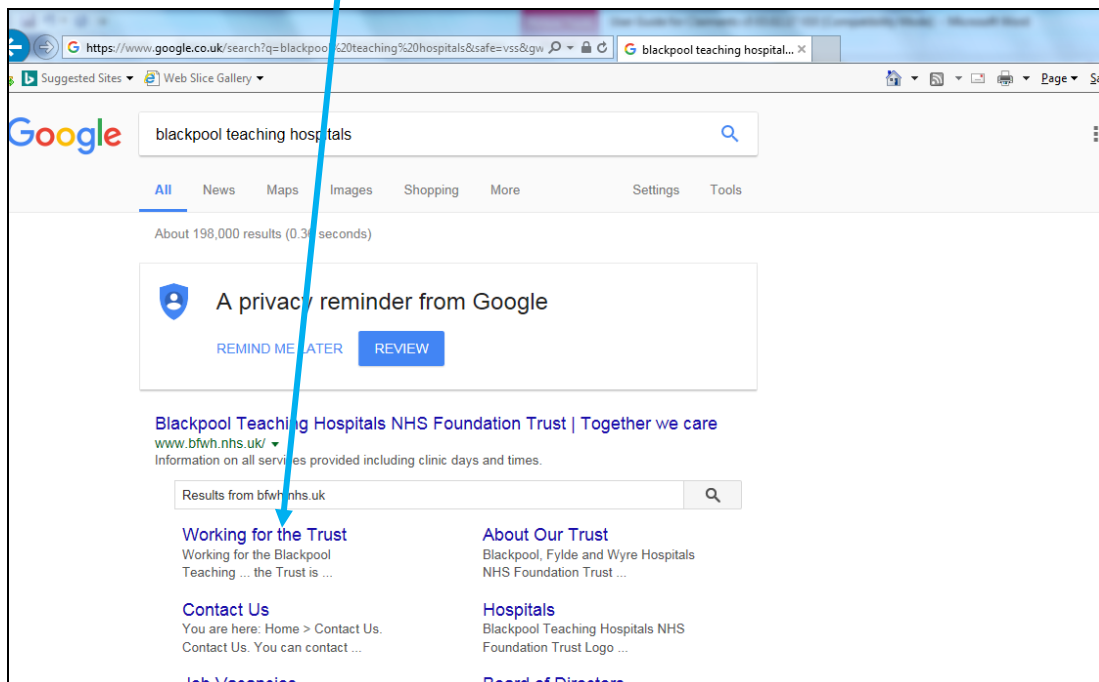
Date: 14.02.19

User Guide for Claimants

From Systems Access on the intranet homepage, pick 'e-Rostering Employee Online'



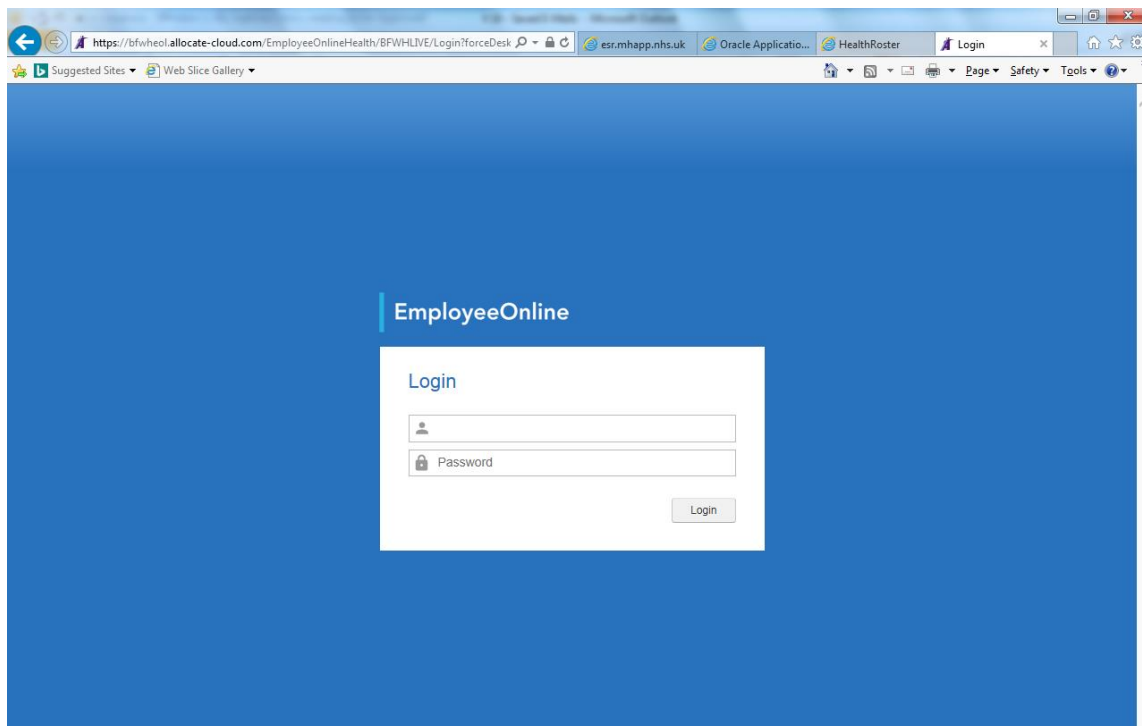
OR Type in your search engine 'Blackpool Teaching Hospitals' to access the website and select 'Working for the Trust'



Click on E-Expenses



Whether accessing the system through the internal intranet site or externally through the internet, this login page will open

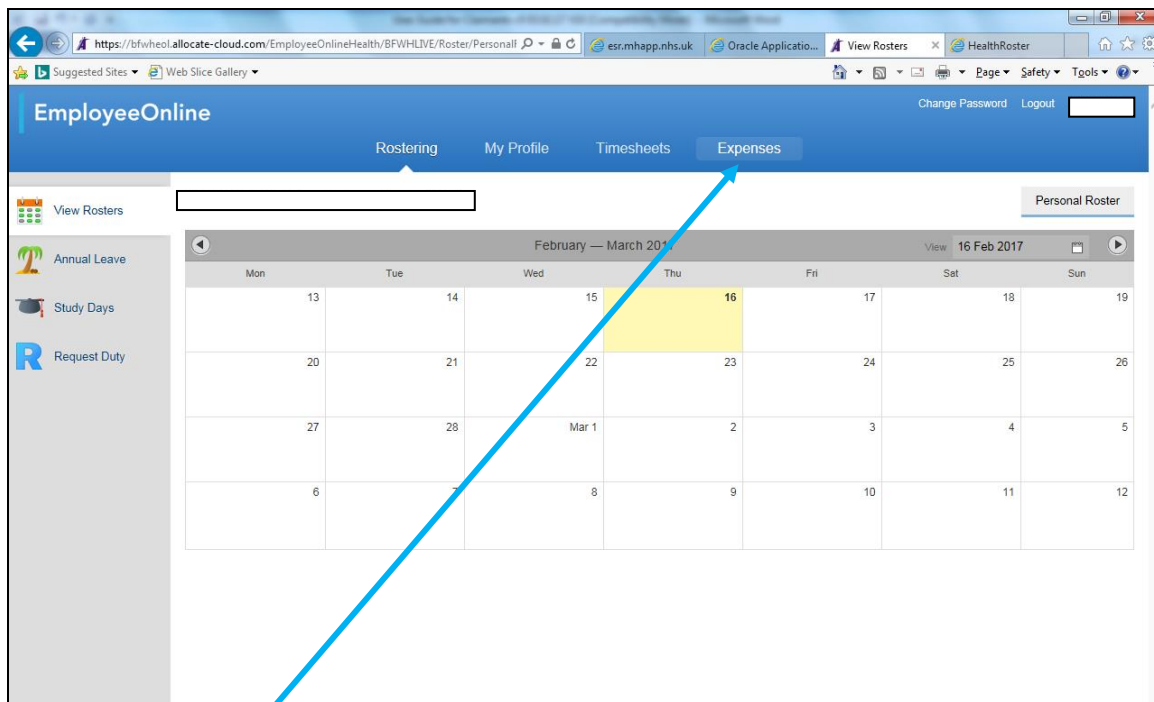


Your Username and Password will be in the following format:

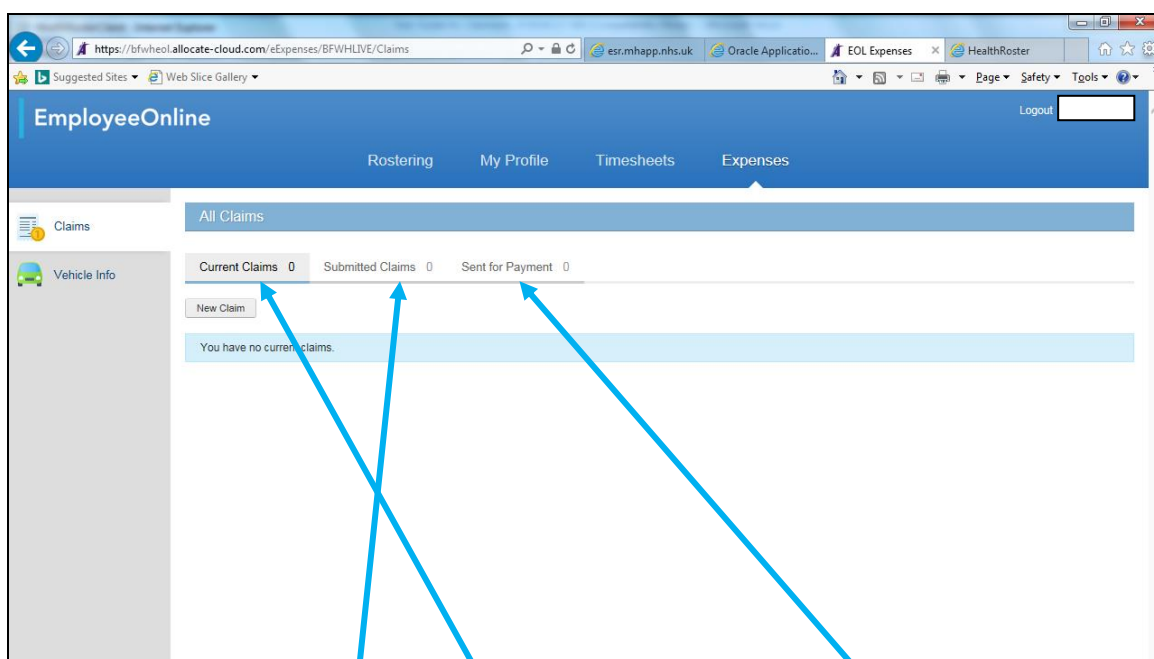
Username: 'SurnameAssignment number' e.g Smith12345678

Password: 'Assignment number' e.g. 12345678

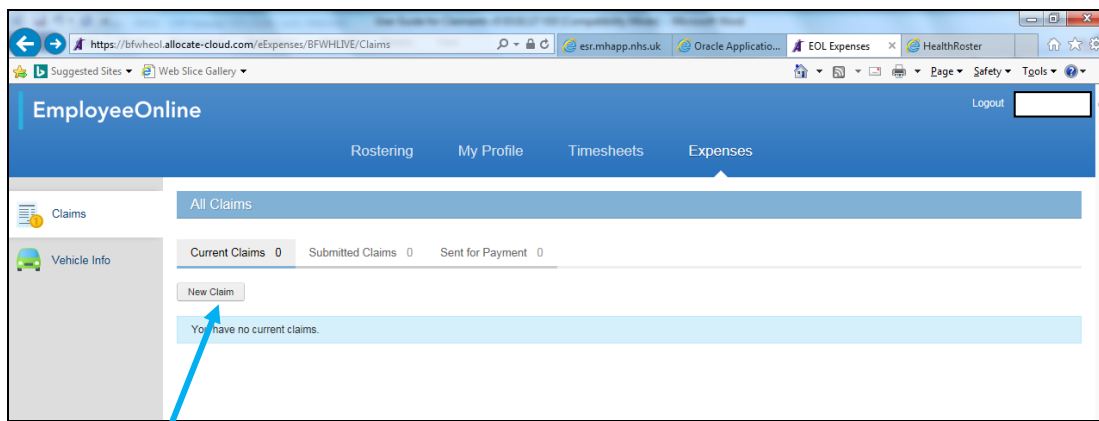
You should see the screen below



Click on the Expenses tab across the top of the screen. All other tabs are for use with e-Rostering.



Within this screen you can view your current claims (ones which have not yet been submitted) along with submitted claims and those which have been approved and sent to payroll for payment using these tabs



To add a new claim, click 'New Claim'

Enter a claim Description and pick the posting that the claim applies to (ie if you have 2 jobs within the trust make sure you select the correct one) then click 'Create'

NB If you are claiming expenses for your Bench post, make sure that you choose your bench post in the 'Posting' box. The 'Approving Unit' will default to Bench but you will need to change this to the unit where you have worked the bench shift, i.e. if you have done a bench shift for Clifton Outreach, then the Approving Unit should read 'Clifton Outreach'

NB You only need to add one claim per month for each posting you need to claim against, you can enter many lines within one claim. When you return to a claim to add more lines you need to use the edit button.

Once you have clicked the 'Create' button, this screen will appear

The screenshot shows the 'EmployeeOnline' interface for creating a new claim. The top navigation bar includes 'Rostering', 'My Profile', 'Timesheets', and 'Expenses'. The left sidebar has 'Claims' and 'Vehicle Info'. The main content area is titled 'Claim Details' and contains a form with the following fields:

- Claim description: Claim for Feb-2017
- Posting: [dropdown menu]
- Approving unit: [dropdown menu]
- Notes: [text area]
- Total value (excl. mileage): £0.00
- Total miles: 0

Below the form, there are four tabs: 'Mileage', 'Travel', 'Subsistence', and 'Supplementary', each with a '0' next to it. A 'New Expense' button is located below the tabs. A message states: 'There are currently no mileage expenses for this claim.' At the bottom right, there is a green success message: 'Claim created successfully', and buttons for 'Back to claims', 'Save', and 'Submit'.

Four blue arrows point from the text below to the 'New Expense' button and the four tabs (Mileage, Travel, Subsistence, Supplementary).

Select the appropriate element using the tabs across the top then click 'New Expense'.

Claim Details — Ref. :

Mileage Expense — [Enter description / notes](#)

Expense Type Incurred On Using

Itinerary

1 Garstang Medical Centre, Kepple Lane, Garstang, PRESTON, PR3 1PB, UNITED KINGDOM to Blackpool Wyre & Fylde H...

Journey Information

☐ Carried passengers
☐ Carried equipment

From
To
☐ Includes return trip [Show map](#)

Claimed travel

Miles

Type in a claim description

Select the appropriate information from each of the dropdown lists for Expense Type and Vehicle (Using) and select the appropriate date.

Type in the postcode or place name of the From and To destinations. If you do not have the postcode, you must be quite specific when entering place names or the correct result will not be returned.

The mileage will be automatically calculated using the suggested route. If you need to amend the calculated mileage, you can do so by changing the description and manually typing the amount of miles to be claimed. If you do this you should use exact miles i.e. do not round up or down.

You can use the 'Includes Return Trip' tick-box for a round trip and total mileage will be calculated

If you have been on a journey that consists of many destinations/stops ie:

Garstang Medical Centre – Victoria Hospital – Fleetwood Hospital – Garstang Medical Centre

you can use the 'Add Trip' function:

The screenshot shows a software interface for adding a trip. At the top, there's a 'Claim Details' section with a 'Ref.' field. Below it is a 'Mileage Expense' section with a 'Claim For' dropdown set to 'February'. The 'Expense Type' is 'Business Mileage', 'Incurred On' is '01 Feb 2019', and 'Using' is 'JKAHFEA (Private - ggdJ D:'. The 'Itinerary' section lists three legs of the journey:

- Leg 1:** Garstang Medical Centre, Kepple Lane, Garstang, PRESTON, PR3 1PB, UNITED KINGDOM to Blackpool Wyre & Fylde H...
 - Journey Information:** ☐ Carried passengers, ☐ Carried equipment.
 - From:** Garstang Medical Centre, Kepple Lane, (marked with a green 'A').
 - To:** Blackpool Wyre & Fylde Health Authority (marked with a red 'B').
 - ☐ Includes return trip. [Show map](#)
 - Claimed travel:** Using suggested route (dropdown), 13.4 Miles.
- Leg 2:** Blackpool Wyre & Fylde Health Authority, Victoria Hospital, Whinney Heys Road, BLACKPOOL, FY3 8NR, UNITED KINGD...
 - Journey Information:** ☐ Carried passengers, ☐ Carried equipment.
 - From:** Blackpool Wyre & Fylde Health Authority (marked with a green 'A').
 - To:** Fleetwood Hospital, Pharos Street, FLEI (marked with a red 'B').
 - ☐ Includes return trip. [Show map](#)
 - Claimed travel:** Using suggested route (dropdown), 8.5 Miles.
- Leg 3:** Fleetwood Hospital, Pharos Street, FLEETWOOD, FY7 6BE, UNITED KINGDOM to Garstang Medical Centre, Kepple Lane...
 - Journey Information:** ☐ Carried passengers, ☐ Carried equipment.
 - From:** Fleetwood Hospital, Pharos Street, FLEI (marked with a green 'A').
 - To:** Garstang Medical Centre, Kepple Lane, (marked with a red 'B').
 - ☐ Includes return trip. [Show map](#)
 - Claimed travel:** Using suggested route (dropdown), 16.4 Miles.

At the bottom, there are buttons: 'Add trip' (highlighted with a blue arrow), 'Cancel', 'Save', and 'Save and New'.

- You should key in the first leg of trip as normal ie: 'From' Garstang Medical Centre, 'To' Victoria Hospital
- Click Add Trip
- You will see that the next leg of the journey is populated with the 'From' information already saved
- Enter the 'To' information and make any other necessary adjustments – e.g. passengers / equipment / claimed travel
- You should repeat these steps for each leg of the journey.

Once you have finished entering your expenses, click on the save button

EmployeeOnline

Logout

Claim Details

Claim description: Claim for Feb-2017

Posting: [Dropdown]

Approving unit: [Dropdown]

Notes: [Text Area]

Total value (excl. mileage): £0.00

Total miles: 6

Mileage 1 Travel 0 Subsistence 0 Supplementary 0

New Expense

Expense Type	Incurred On	Description/Notes	From	To	Miles	Actions
✓ Business Mileage	01 Feb 2017	Claim for February 2017	Poulton-le-Fylde FY6 8JT, UK	Blackpool FY1 6JX, UK	6	[Edit] [Delete]

1 - 1 of 1 items

Back to claims Save Submit

You can now either submit your claim if you are happy it is complete or log out to return at a later stage and add more entries

**** Please note that if you click 'New Claim' when you log back in to enter more lines, you will be starting a brand new claim not adding to the one you already have open. You should only have only one claim open per month.**

You can revisit the same claim under the current claims tab, using the edit icon and keep entering lines until the end of the claim period.

To add to the existing claim, you should click the 'Edit' button and continue adding expenses until you have finished for the month

EmployeeOnline

Logout

All Claims

Current Claims 1 Submitted Claims 0 Sent for Payment 0

New Claim

Name	Ref	Status	Approving Unit	Items	Miles	Cost	Actions
▶ Claim for Feb-2017	[Text Box]	Created	[Text Box]	1	6.0	£0.00	[Edit] [Delete] [Status]

1 - 1 of 1 items

Once you have finished entering your claim for the month and have checked the entries are correct, you will need to submit the claim from the current claims screen. Tick the box on the disclaimer and click 'Confirm' The claim will now appear in the Submitted Claims screen.

Once your claim has been submitted to your manager, it will either be accepted for payment or rejected for you to amend. If your claim is rejected, it will appear again in the current claims screen with a message as to why it has been rejected. You will need to make any necessary changes and re-submit your claim.

Any receipts relating to your claim should be presented to your manager/approver upon their request. It is your responsibility to ensure all receipts are kept for a minimum of 4 years and are available should they be requested.

Claims should be submitted by the 5th of each month and must be approved and ready for payroll action by the 10th of each month. Any claims that have been rejected must also be re-submitted and approved by the 10th.

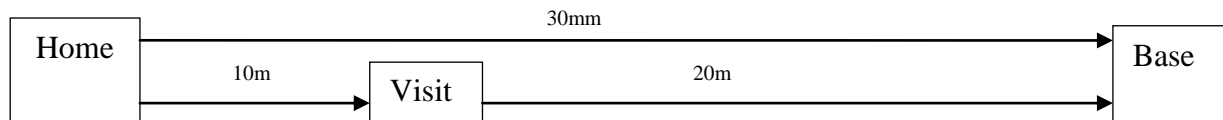
****NB**** It is strongly recommended that claims are input as they arise on a regular basis and are submitted and approved on time every month, regardless of how large or small the claim. - Retrospective claim date restrictions will apply.

You can get guidance on claimable items and rates of mileage reimbursement from the Agenda for Change Handbook

Starting or ending your journey at your home address

Your normal home to base mileage is not classed as business mileage and is therefore not a claimable expense. You will not always need to travel into your base before starting your journeys for the day; likewise, you will not always need to end your days' journeys at base. In these instances, the miles claimed should be the difference between Home to Base and actual miles travelled (in effect you should deduct normal home to base mileage from the total journey).

Example 1 - Journey only starts at home address



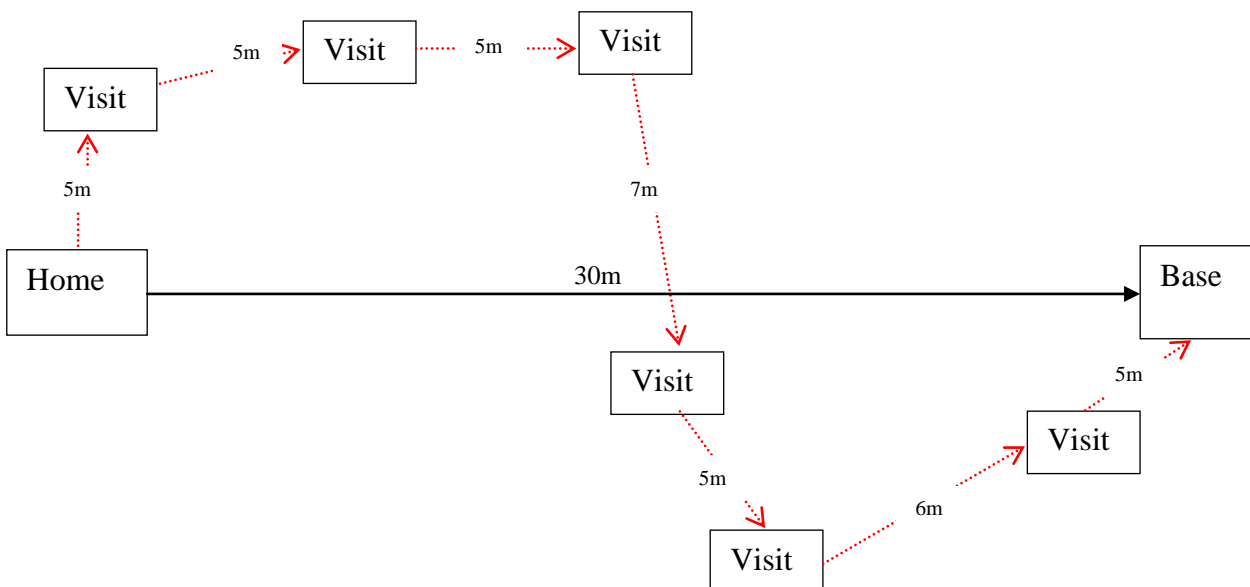
Total Miles Travelled = 30

Ordinary Home to Base Mileage = 30

Eligible Business Mileage = 0

To administer this in EoL, you should type in the true journey i.e. Home to Visit to Base and allow the system to calculate the true mileage – in this example 30 miles. You should then use the 'Home to Base' option and override the calculated miles with actual miles to be claimed – in this example 0 miles (total miles minus home to base miles)

Example 2 - Journey only starts at home address and is made up of multiple visits



Total Miles Travelled = 38

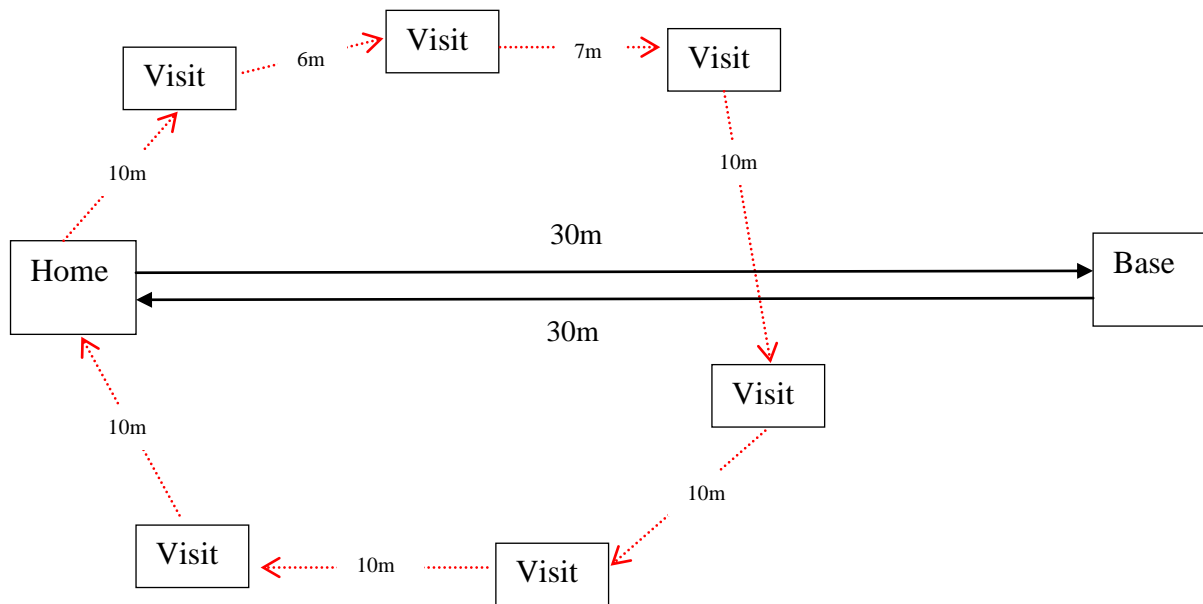
Ordinary Home to Base Mileage = 30

Eligible Business Mileage = 8

To administer this in EoL, you should type in the true journey i.e. Home to each Visit, finishing at Base and allow the system to calculate the true mileage at each stage. You should use the 'Home to Base' option at each stage to override the calculated miles with 0 until you reach the stage at which mileage is claimable. In this example, the claimable mileage is 8 so you would override the calculated miles with 0 for each stage of the

journey. On the last stage/stages of the journey, you can claim the eligible mileage, using the 'Home to Base' override option.

Example 3 – Journey starts and ends at home address



Total Miles Travelled = 63

Ordinary Home to Base Mileage (2 ways) = 60

Eligible Business Mileage = 3

To administer this in EoL, you should type in the true journey i.e. Home to each Visit, finishing back at Home and allow the system to calculate the true mileage at each stage. You should use the 'Home to Base' option at each stage to override the calculated miles with 0 until you reach the stage at which mileage is claimable. In this example, the claimable mileage is 3 so you would override the calculated miles with 0 for each stage of the journey then on the last stage/stages of the journey, you can claim the eligible mileage, using the 'Home to Base' override option.