# **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'

More Information	e care	BFWNet Google	Phone     Search	Blackpool Teach ng Hospitals Vis Foundation Trust T J FEB 16 09:34:00	HS
· · · ·		V Plea	se enter:		
		A telephone extension to s	earch by phone nur	ımber;	
		A bleep number (3-digit) to	search by pager;		
		Any other text to search b	y name.		
		or select BFWNet or Goog	le above to search.		
Daily on-call rota	Medical weekend rota	SharePoint D	ecember 2016:🖪 <u>Te</u>	<u>Feam Brief</u> 🖻 <u>Value of the Month</u> 🛡 <u>Watch video</u> 🛡 <u>Patie</u>	ent Stories
Ensure t follow t Heart Pathwa	hat you he Failure ay: Antimicrobial	View the pathway Per-	Aaily Educator Formance	Click he e to access all Better Care Now pathways	
ICT Service Desk   New	IT Equip.   Estates Services	<u>Medical Engineering</u>   <mark>!</mark>	Incident Reporting	Pharmacy Med 24-7   Alcohol assessment   Produc	ctive Ward
<b>V</b> Divisions and Depa	rtments:	Search:	▼ System Ac	ccess: Search:	
Scheduled care: Unscheduled care: Corporate Services: Families: Facilities & Clinical Support: Non-Divisional: Can't find it? A to Z	eDischarge System eReferrals eCompliments / eComplaints Document Library New Documents (Last 60 da Health Records Document L Communications Clinical Pathways Library Services Room Booking System	s Form ys) ibrary	Clinical: Clerical: Training: Resources: A to Z:	- clinicalski s.net     - Enterprit Informatics Application     - Envoy     - Rostering Employee Online     - ESR System [Smartcard required]     - EuroKing Maternity Information System     - Incident Reporting     - IT Training e-Class LMS     - MedeAnalytics     - Medevnox     - NHS Choices	
Markford A	dudaamu Camilaa		-UD.	Annual and a Charles than the Day	

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

1 ··· · ·					-			l	-		
G https://w	ww. <b>google.co.uk</b> /search?q=blackpoc	620teaching%20hospitals	&safe=vss&gw 🔎 🗕 🖒	G blackpoo	l teaching h	ospital ×					
🗴 🕟 Suggested Sites 👻	🥙 Web Slice Gallery 🕶						• 🔊	• 🖃	-	Page •	<u>S</u> af
Google	blackpool teaching hosp	tals			Q	]					
	All News Maps	Images Shopping	More	Settings	Tools						
	About 198,000 results (0.3 s	econds)									
	A privacy r	eminder from	Google								
	REMIND ME AT	ER REVIEW									
	Blackpool Teaching H www.bfwh.nhs.uk/ マ Information on all servies pro	ospitals NHS Fou	ndation Trust   Tog	ether we c	are						
	Results from bfwh nhs.uk				Q						
	Working for the Tru Working for the Blackpoor	ust	About Our Trust Blackpool, Fylde and V	Vyre Hospitals	6						
	Teaching the Trust is .		NHS Foundation Trust								
	Contact Us		Hospitals								
	You are here: Home > Co Contact Us. You can con	ontact Us. itact	Blackpool Teaching H Foundation Trust Logo	ospitals NHS							
	lob Vacancies		Roard of Directo	re							



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

a for a close when a property of the basis to be a set of the set of the	-			
🗲 🛞 🥼 https://bfwheol.allocate-cloud.com/EmployeeOnlineHealth/BFWHLIVE/Login?forceDesk 🔎 = 🔒 🖉 🧭 esr.mhapp.r	nhs.uk 🥝 Oracle Applicatio	HealthRoster	🔏 Login	× 🔐 🗘 🕸
👍 🕟 Suggested Sites ▼ 🗿 Web Slice Gallery ▼		🕅 • 🗟 • 🖂	🖶 🔻 Page 🕶	Safety + Tools + @ + "
				^
EmployeeOnline				
Login Password				
	Login			

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

Contraction of the second		Inclusion	to Carrante at \$100.7 to	Competently Made	Manual Stat						×
A https://bfwheol.al	llocate-cloud.com/eExpense	s/BFWHLIVE/Claims	5 <u>6</u> + Q	esr.mhapp.nhs.uk	Ø Oracle Applicatio	🔏 EOL Expe	nses	× 🥔 Healtl	nRoster	<u>ि</u>	☆ 鐐
👍 📘 Suggested Sites 👻 餐 We	eb Slice Gallery 🔻					👌 • 🖻	• 🖃	🖶 👻 Pag	e 👻 Safety 🕶	T <u>o</u> ols ▼ (	₽ ~ "
EmployeeOnl	ine								Logout		<b>_</b> ^
		Rostering	My Profile	Timesheets	Expenses						
Claims	All Claims										
Vehicle Info	Current Claims 0 New Claim You have no current cla	Submitted Claims 0	Sent for Payment 0								

To add a new claim, click 'New Claim'

4 ** 0 × -		the last is	Ser. 1997	CO ( any state in the local	Monate First			- 0 - X
+ https://bfwhe	ol.allocate-cloud.com/eExpenses/8	FWHLIVE/Claims/New		🖒 🦪 esr.mhapp.nhs.uk	🦪 Oracle Applic	atio 🔏 New Claim	ı - E × <i>i</i> HealthRoster	- 🔓 🛠 🕄
🔉 🕟 Suggested Sites 👻 🧧	Web Slice Gallery 🔻					🟠 🔻 🔊 ·	• 🖃 🖶 ▼ <u>P</u> age ▼ S	afety 🕶 T <u>o</u> ols 👻 🔞 🕶
EmployeeO	nline							ogout
		Rostering	My Profile	Timesheets	Expenses			
Claims	New Claim							
Vehicle Info	Claim description Cl Posting Approving uni	aim for Feb-2017		Notes	£ To O	tal value (excl. mileage) 0.00 tal miles		
							Cancel Crea	Submit

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'

**<u>NB</u>** 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'

**<u>NB</u>** 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

	National Control of Co	Number of Difference, 2017						
https://bfwheol.	allocate-cloud.com/eExpense	es/BFWHLIVE/Claims/New	, <b>0 - ≙</b>	C esr.mhapp.nhs.uk	Oracle Applicatio	New Claim - E ×	HealthRoster	<u>↑</u> ☆窓
👍 🕒 Suggested Sites 👻 🚑 W	/eb Slice Gallery 🔻						h ▼ <u>P</u> age ▼ <u>S</u> afety ▼	Tools - 🕢 -
EmployeeOn	line						Logout	
		Rostering	My Profile	Timesheets	Expenses			
Claims	Claim Details —							
Vehicle Info	Claim description Posting Approving unit	Claim for Feb-2017	×	Notes	E0.0 Total mile	ue (excl. mileage) 0		
	Mileage 0 Trav	el 0 Subsistence 0	Supplementary	0				
	There are currently to	mileage expenses for this claim						
		//			Claim created succe	Back to cla	aims Save	Submit
			$\square$					

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

Claim Details — Ref. :
Mileage Expense — Enter description / notes
Expense Type Business Mileage Incurred On 01 Feb 2019 🗰 Using JKAHFEA (Private - ggdJ D
Itinerary
1 Garstang Medical Centre, Kepple Lane, Garstang, RESTON, PR3 1PB, UNITED KINGDOM to Blackpool Wyre & Fylde H
Journey Information From Garstang Medical Centre, Kepple Lane, Claimed travel
Carried passengers To Blackpool Wyre & Fylde Health Authen Using suggested route Diversion 15 Miles
Includes return trip Show map Roadblock
Add trip Cancel Save Save and New
Type in a claim descrpition

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 tying 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

Claim Details — Ref. :		
Mileage Expense — Cla	m For Feb	ruary
Expense Type Business Mileag	e [	✓ Incurred On 01 Feb 2019 Using JKAHFEA (Private - ggdJ D: ✓
Itinerary		
1 Garstang Medical Cent	e,Kepple La	ane, Garstang, PRESTON, PR3 1PB, UNITED KINGDOM to Blackpool Wyre & Fylde H
Journey Information	From	Garstang Medical Centre, Kepple Lane,     Claimed travel
Carried passengers	То	Blackpool Wyre & Fylde Health Authori       Using suggested route       13.4       Miles         Includes return trip       Show map
2 Blackpool Wyre & Fylde	e Health Aut	hority, Victoria Hospital, Whinney Heys Road, BLACKPOOL, FY3 8NR, UNITED KINGD
Journey Information	From	Blackpool Wyre & Fylde Health Authori     Claimed travel
Carried passengers Carried ec upment	То	Includes return trip       Show map    Using suggested route          8.5       Miles
3 Fleety ood Hospital,Pha	ros Street,F	LEETWOOD, FY7 6BE, UNITED KINGDOM to Garstang Medical Centre, Kepple Lane
Journey Information	From	Fleetwood Hospital, Pharos Street, FLEI     Claimed travel
Car ed passengers Carried equipment	То	Includes return trip       Show map             Using suggested route       16.4
Add trip		Cancel Save Save and New

you can use the 'Add Trip' function:

- 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

			0.04		( <b>A a a a a a a a a a a</b>		<i>(</i> <b>2</b>	
A https://bfwheol.	.allocate-cloud.com/eExpenses/BFWHLI	VE/Claims/Edit//	),÷∎c	esr.mhapp.nhs.uk	Oracle Applicatio	A New Claim - E ×	🕒 HealthRoster	1003
Suggested Sites 👻 🛃 V	Neb Slice Gallery 🔻						▼ <u>P</u> age ▼ <u>S</u> afety	/▼ T <u>o</u> ols ▼ ((
mploveeOn	line						Logou	ıt
		Rostering	My Profile	Timesheets	Expenses			
Claims	Claim Details —							
					Total valu	(eyc) mileage)		
Vehicle Info	Claim description Claim for	Feb-2017	Not	les	FO o	0		
	Posting		$\sim$		Zotal anil	<u> </u>		
	Approving unit				6	15		
	Milana ( Tanul (	Cubaistana 0	Sumlanata 0					
	Mileage	Subsistence 0	Supplementary 0	_				
	New Expense							
	Expense Type	Incurred On	Description/Notes	From		To	Miles	Actions
	Business Mileage	01 Feb 2017	Claim for February 20	17 Poulton-le-F	Fylde FY6 8.IT. UK	Blackpool EY1 6JX U	K 6	×
	*		,		,			
	1							1 - 1 of 1 items
						Desiste sta		0.1
						Back to cla	ms Save	Submit
							Solve PC i su	es: 1 message

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

Image: https://bfohed_allocate-cloud.com/eExpenses/BFWHLWE/Claims       P - ■ C       C escmhapp.nhs.uk       Oracle Application       X EOL Expenses       X Methhod         Image: Suggested Sites • Image: Web Site Galley •       Image: Non-openational status	P + @ C       @ esr.mhapp.nhs.uk       @ Oracle Application       EOL Expenses       > @ HealthRoster       0 * 0       0 * 0       0 * 0       0 * 0       0 * 0       0 * 0       0 * 0       0 * 0       0       0 * 0       0											
Integr/Mitheel.allocate-cloud.com/eExpenses/BRWHLIVE/Claims       P < B C	FRMHLIM/Claims       P - @ C       @ errmhappinhs.uk       @ Oracle Applicatio	al the state		State Galder for	Surveyore, or Street, or other	Comparison, Street	Manager Street					
Suggested Sites ▼ @ Web Silce Galley ▼         EmployeeOnline         Rostering My Profile Timesheets Expenses         Claims         All Claims         Claims         Superiod Sites ▼ @ web Silce Galley ▼         Webicle Info         Vebicle Info         Name         Ref       Status         Approving Unit       Items         Name         Claim for Feb-2017	Image: Page Subject of the second	https://bfwhe	eol.allocate-cloud.com/eExpenses/BFWHLIVE	/Claims	D-≞¢	🦪 esr.mhapp.nhs.uk	Oracle Application	🗶 E	OL Expenses	🗙 🏈 Heal	thRoster	
Rostering My Profile Timesheets Expenses         Claims       All Claims         Vehicle Info       Current Claims 1         Name       Ref         Status       Approving Unit         Name       Ref         Status       Approving Unit         Items       Miles         Coat       1         6.0       6.000	Rostering       My Profile       Timesheets       Expenses         Submitted Claims       0       Sent for Payment       0         Ref       Status       Approving Unit       Items       Miles       Coet       Actions         17       Created       1       6.0       £0.00       =       X       •	🕞 Suggested Sites 👻 🧧	Web Slice Gallery 🕶					6	🔊 • 🗆	🖶 🕶 Pag	ge 🔹 Safety 🔹	T <u>o</u> ols 🕶 🄇
Claims Cl	Rostering     My Profile     Timesheets     Expenses       Submitted Claims     0     Sent for Payment     0       Ref     Status     Approving Unit     Items     Miles     Cost     Actions       17     Created     1     6.0     £0.00     ¥     •	E	2112 C									
Claims     All Claims     My Profile     Timesheets     Expenses       Vehicle Info     Current Claims     Sent for Payment        Name     Ref     Status     Approving Unit     Items     Miles     Cost       Name     Ref     Status     Approving Unit     Items     Miles     Cost       Claim for Feb-2017     Created     1     6.0     £0.00	Rostering     My Profile     Timesheets     Expenses       Submitted Claims     0     Sent for Payment     0       Ref     Status     Approving Unit     Items     Miles     Cost     Actions       17     Created     1     6.0     £0.00     🚔     X     Image: Cost     Actions	mpioyeeO	nine									L
Claims       All Claims         Vehicle Info       Current Claims 1       Submitted Claims 0       Sent for Payment 0         New Claim       Name       Ref       Status       Approving Unit       Items       Miles       Cost         Name       Ref       Status       Approving Unit       Items       Miles       Cost         Claim for Feb-2017       Created       1       6.0       £0.00	Submitted Claims 0 Sent for Payment 0 Ref Status Approving Unit Items Miles Cost Actions 17 Created 1 6.0 £0.00 2 X O			Rostering	My Profile		Expenses					
Claims       All Claims         Vehicle Info       Current Claims 1         New Claim       Name         Name       Ref         Status       Approving Unit         Items       Miles         Cost       1         6.0       £0.00	Submitted Claims 0 Sent for Payment 0 Ref Status Approving Unit Items Miles Cost Actions 17 Created 1 6.0 £0.00 $\stackrel{\sim}{=}$ X O											
Claims       Current Claims       1       Submitted Claims       0       Sent for Payment       0         New Claim       Name       Ref       Status       Approving Unit       Items       Miles       Cost         Name       Ref       Status       Approving Unit       Items       Miles       Cost         Liaim for Feb-2017       Created       1       6.0       £0.00	Submitted Claims 0 Sent for Payment 0           Ref         Status         Approving Unit         Items         Miles         Cost         Actionsy           17         Created         1         6.0         £0.00         #         X         Image: Cost		All Claims									
Current Claims 1         Submitted Claims 0         Sent for Payment 0           New Claim         Name         Ref         Status         Approving Unit         Items         Miles         Cost           Name         Ref         Status         Approving Unit         Items         Miles         Cost           L         Claim for Feb-2017         Created         1         6.0         £0.00	Submitted Claims 0 Sent for Payment 0           Ref         Status         Approving Unit         Items         Miles         Cost         Actionary           17         Created         1         6.0         £0.00         =         X         Image: Cost	Claims										
Name         Ref         Status         Approving Unit         Items         Miles         Cost           Image: Ima	Ref     Status     Approving Unit     Items     Miles     Cost     Actonity       17     Created     1     6.0     £0.00     =     X     Y	Vehicle Info	Current Claims 1 Submitte	d Claims 0 S	Sent for Payment 0							
New Clean         Ref         Status         Approving Unit         Items         Miles         Cost           Marce         Claim for Feb-2017         Created         1         6.0         £0.00	Ref         Status         Approving Unit         Items         Miles         Cost         Actionage           17         Created         1         6.0         £0.00         =         X         Y	Vehicle Info										
Name         Ref         Status         Approving Unit         Items         Miles         Cost           Image: Claim for Feb-2017         Created         1         6.0         £0.00	Ref         Status         Approving Unit         Items         Miles         Cost         ActionSy           17         Created         1         6.0         £0.00         =         X         Y		New Claim									
Claim for Feb-2017         Created         1         6.0         £0.00	17 Created 1 6.0 £0.00 🚋 🗙 🔿 🦯		Name	Ref	Status	Approving Unit		Items	Miles	Cost	A	ctions
			Claim for Feb-2017		Created			1	6.0	£0.00	🚢 🗙	0/
	den de la Marine de M					•						
1	1 = 1 07   Herris		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 5<sup>th</sup> of each month and must be approved and ready for payroll action by the 10<sup>th</sup> of each month. Any claims that have been rejected must also be re-submitted and approved by the 10<sup>th</sup>.

**\*\*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)

#### Visit Visit 5m 5m - 73 Visit Ą 5m 7m 30m Base Home 5m Visit Visit 5m 6m Visit Total Miles Travelled = 38 Ordinary Home to Base Mileage = 30 Eligible Business Mileage = 8

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

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.





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.