



Inputting mileage and expense claims - Maintained

- This process must be used by all **maintained and foundation/VA schools (and specific academies)** where authorisation has been disabled to enter payments against employees using pre-built claim forms e.g. for mileage and expenses, holiday pay adjustments and overtime/supply claims.

These claims, once submitted will be paid in the next payroll run, unless the cut-off date has been reached where these will be paid in the next payroll run.

Step 1

- Go to the **Time & Expenses Input** option on the Your HR homepage
- On the left of the screen select one of the following templates.
Note: If there are multiple versions of templates with the same/similar name, ensure you select one that is **'Active'**. You can check this by hovering over the template name as shown below:
- **Mileage and expenses:** select the one called 'Schools Mileage and Expenses – ADHOC Vehicle'

Step 2

- On the next screen you can search for an individual person using the search criteria fields available for example the **Personal ref.** Click on the **Search** button

- Enter a Start date of the 1st day of the month relating to the claims you are entering

- To start entering claims click on the **NEW** button

OR

- If you click on the magnifying glass next to the 'Smartgroup' field and select "All employees and leavers in last 30 days". This will then bring back all staff within your school

- At the bottom of the list are two options, by picking the first you can loop through all staff and enter claims for a number of staff, skipping people where required. The second

option only allows you to enter one claim against the employee; to change this person click on the required employee

- ☒ Select start point in the smartgroup and cycle through the list
- ☐ Only enter values against the selected individual

Step 3

- The next screen is the claim form, the employees name and position is shown at the top of the screen. If the employee has more than one job you can select it here.
- There are two pages: "Mileage Claims – Page 1" and "Expenses – Page 2" to navigate
- When entering Mileage Claims (Page 1):
 - **Fuel type:** Is set to the default 'Not applicable' – Do **NOT** change this
 - **Engine (cc):** Enter 1 – *Do NOT enter the actual engine CC*
 - **Scheme:** This defaults to '1- Casual Mileage Scheme'. Amend this according to the relevant scheme if needing to pay essential or appendix E; Otherwise leave the default
 - **Cost Centre:** Optional Cost Centre override to be entered if required
 - **Date:** Enter the start date of the claim
 - **Miles:** Enter mileage to be claimed
 - **"From" and "To":** Enter where you are travelling "From" and "To" (Destination)
 - **Claim Reason:** Enter reason for the claim
- You can enter more than one row by clicking **(+)**
- When entering Expense Claims (Page 2):
 - **Element:** Choose the type of expense and refer to the Element User Guide for more information
 - **Date:** Enter the start date of the claim
 - **Description:** Enter a description of the claim
 - **Amount:** Enter the amount that needs to be claimed
- Once you have entered your Mileage or Expense Claims (or both), please click **SAVE**

If you do not want to enter a claim for the person selected click skip and if you are looping through employees the next employee will be selected.

Once you have completed your input you can click on the Your HR icon on the top left of the screen to go back to the homepage.

Viewing claim details

If you wish to view the claim details, please see section 15.6 of the main schools HR Administration User Guide.

Viewing the claim summary

If you wish to view a summary of the provisional payable value of the claim, please follow Section 15.7 of the main schools HR Administration User Guide.