



Inputting and Submitting Mileage and Expense Claims - Academies

This guide will show you how to **Input Mileage & Expense Claims** in **Your HR** ready for them to be authorised.

This section provides guidance on how to enter claims for **academies that use the in system authorisation process**. This is a 2 step process; the first requires you to select the correct template and enter the claim details. The second step requires you to submit the claim for authorisation. If the second step is not done, the claim will not be processed!

Important Notes:

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

How to Input Mileage and Expense Claims

Stage 1

- Search for the employee then from the Links section
- Click **Temporary Payments & Expenses > Step 1 – New Time & Expenses**.

Enter -

- **Start date:** Enter the start date for the claim
- **Job title:** If the employee has more than one position you must select the correct position
- **Claim template:** *Select Mileage and Expenses*
- Click **NEW**

Stage 2

- The claim template is now shown
- 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** (this does not submit the claim to be authorised)
- If you hover over the template name from the left hand navigation, you will notice that the Authorisation status is showing as '**Provisional**'

Stage 3

- At the top of the screen, click **Step 2 – Submit Time and Expenses Claim**
- **Click Approve** to submit the claim for authorisation
- This will generate an email and task to your authoriser(s) for them to review and action the claim as required.

Once submitted, hover over the claim details from the left hand navigation and you will see that the status is now showing as 'Awaiting authorisation'.

***If you would like to view a summary of the claim, click on the Time and Expenses Summary and this will be shown as awaiting authorisation until authorised.**