

Integrated HR/Payroll System Project

Employee MyView

Submitting a Mileage Claim

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1 Employee MyView – Submitting a Mileage Claim

Document Control

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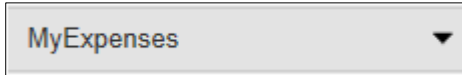
1.2 Change History

VERSION	STATUS	DATE	AUTHOR	SUMMARY OF CHANGES
1.1	DRAFT	01/09/15	CIP Team	Initial Draft

2 Submitting a Web Claim

If you are claiming **Short Term Car Hire** (using your own vehicle) and Short Term Car Hire Equivalent (mileage) then please review section 2.19.1

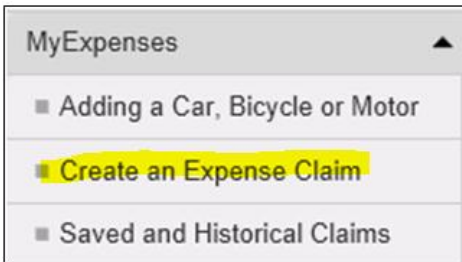
From Dashboard Main Menu



MyExpenses ▼

- 2.1 Click on [MyExpenses]

Expenses drop down menu will appear

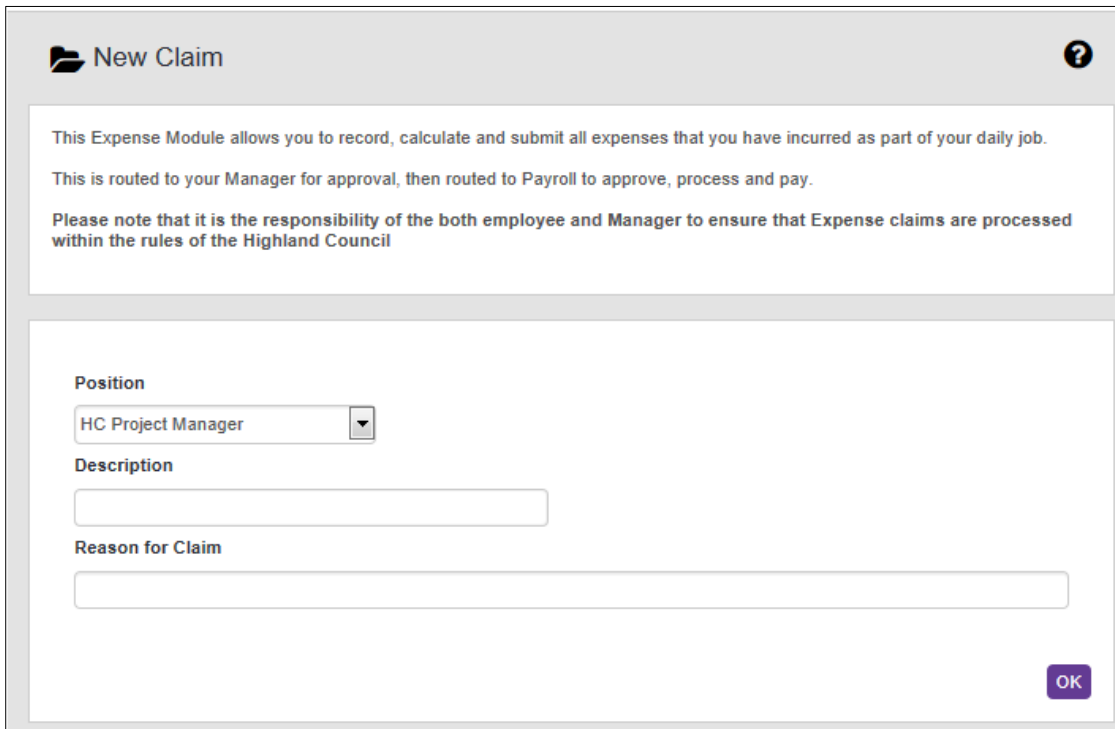


MyExpenses ▲

- Adding a Car, Bicycle or Motor
- **Create an Expense Claim**
- Saved and Historical Claims

- 2.2 Click on [Create an Expense Claim]

New Claims form will appear



New Claim ?

This Expense Module allows you to record, calculate and submit all expenses that you have incurred as part of your daily job.
This is routed to your Manager for approval, then routed to Payroll to approve, process and pay.
Please note that it is the responsibility of the both employee and Manager to ensure that Expense claims are processed within the rules of the Highland Council

Position

Description

Reason for Claim

OK

- 2.3 At [Position], if you hold more than one post within the Highland Council, then at [Position] click on the drop down menu and select the post title you wish to claim for.
- 2.4 At [Description], type claim description – **Please ensure that you include the period travel start and end dates in description**
Example: 01/09/15 – 30/09/15 September Expenses
- 2.5 At [Reason for Claim], please leave blank

Position
HC Project Manager

Description
01/09/15 – 30/09/15 September Expenses

Reason for Claim

OK

- 2.6 Click [Ok]

Expense claim instruction page will appear

01/09/15 - 30/09/15 September Expenses: Highland Council Programme Manager

Welcome to the Highland Council Expense Claim module

INSTRUCTIONS

1. Please ensure that all claims have a claim [Description] and a [Reason for Claim] entered
2. Employees cannot claim for expenses that have not yet been incurred
3. Fuel receipts (where appropriate) **must** be provided
4. Travel and Subsistence claims **must** have supporting receipts as evidence
5. All receipts **must** be scanned and attached
6. If unsure, please review the Highland Council Travel & Subsistence policy or contact Payroll

On submission, your claim will be forwarded to your manager or delegated authorisor for review. On approval / rejection, you will be notified by electronic mail

Wilful disregard of, or intentional breach of Code will be dealt with under the Council's disciplinary procedure

+ Add Line

+ Add Attachments

- 2.7 Click [+ Add Line]

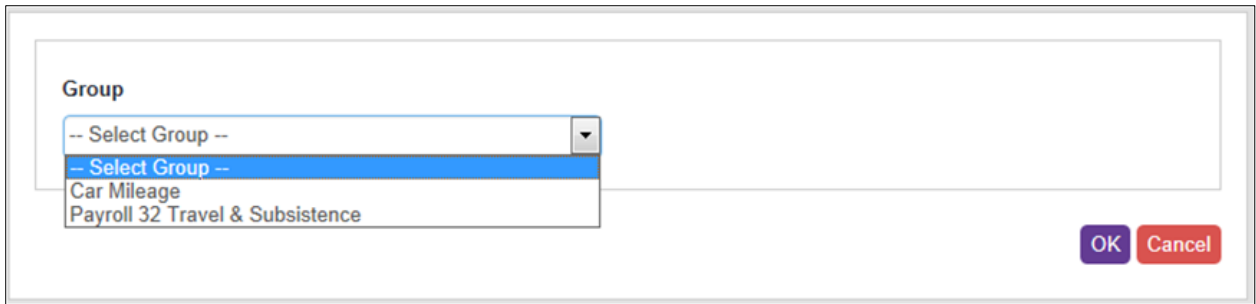
Expenses Group screen will appear

Group

-- Select Group --

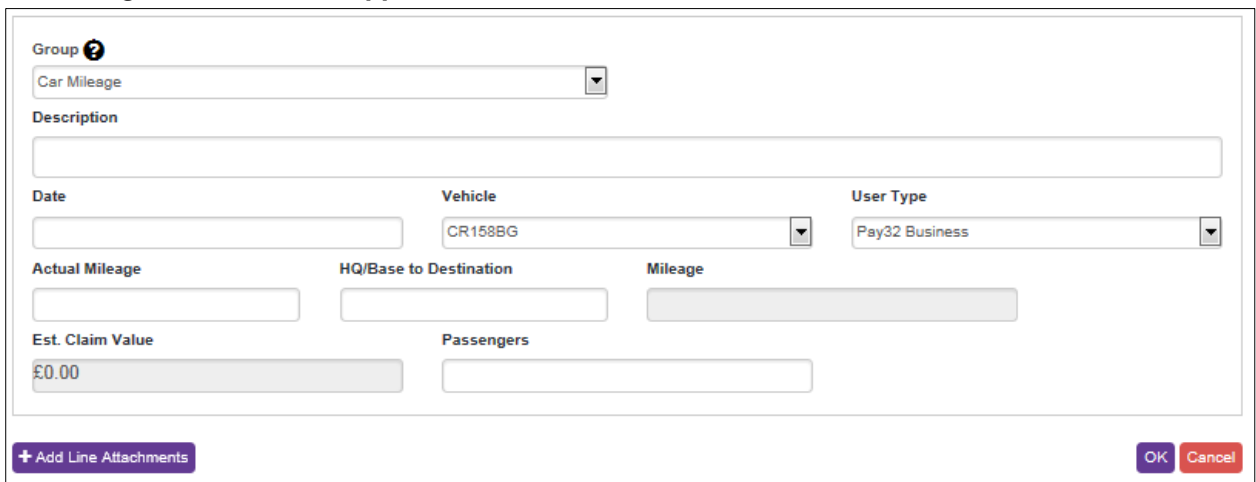
OK Cancel

- 2.8 At [Group], click on drop down menu



- 2.9 Select group [Car Mileage] – **(MANDATORY)**

Car Mileage claim form will appear



- 2.10 At [Description], type journey description (purpose of journey) - **Please include journey times; from and to, the journey description and details of duties (MANDATORY)**
Example: 0800-1600 Base to Moray Council – Elgin (Meeting)
- 2.11 At [Date], calendar will pop up on screen, select date of travel - **(MANDATORY)**
- 2.12 At [Vehicle], the vehicle which you registered in section 3, will appear in this field. However, if you have multi cars then click on the drop down menu and select vehicle. - **(MANDATORY)**
- 2.13 At [User Type], click on drop down menu. **Users must select from the correct category (Pay reference prefix Pay32; Pay38; Pay39; Pay40; Pay53; Pay65; Pay72; Pay83)**

When selecting a User Type it is very important that the correct one is chosen as this affects the mileage rate paid.

For example

- If you are using your own private vehicle, you are classed as a Business user. Therefore, you would select **Pay32/38/39/40/53/65/72/83 Business**. However, in the event of travelling from Home to Base you must choose **Pay32/38/39/40/53/65/72/83 Business Taxable**.
- If you are only claiming Excess or Secondment please choose the relevant option. For Bicycles or Motorcycle then select them respectively as above.
- Lease car users must choose Pay32/38/39/40/53/65/72/83 HC Lease Car (and the respective fuel type ie Petrol / Diesel / BiFuel)
- 2.14 Select [User Type] **PLEASE ENSURE THAT YOU SELECT FROM YOUR OWN PAYROLL REFERENCE NUMBER GROUP SELECTION – see 2.13 . - (MANDATORY)**

Group		
Car Mileage <input type="text"/>		
Description		
0800-1600 Base to Moray Council – Elgin (Meeting)		
Date	Vehicle	User Type
01/09/2015	CR158BG	Pay32 Business
Actual Mileage	HQ/Base to Destination	Mileage
<input type="text"/>	<input type="text"/>	<input type="text"/>
Est. Claim Value	Passengers	
£0.00	<input type="text"/>	

[+ Add Line Attachments](#) [OK](#) [Cancel](#)

- 2.15 At [Actual Miles], enter total miles travelled in journey for that day. **(MANDATORY)**
- 2.16 At [HQ/Base to Destination], enter mileage travelled between Base and Destination **(MANDATORY)**
- 2.17 At [Passengers], enter number of passengers that travelled in the vehicle at time of journey.

If a passenger is collected from a different location a separate journey must be entered for each stage of the journey

Example: Journey between Inverness and Glasgow

Driver leaves Inverness and collects passenger from Aviemore

Line 1 – Inverness to Aviemore to Inverness, totals 60 miles (return) no passenger to be entered

Line 2 – Aviemore to Glasgow to Aviemore, total 280 miles (return) 1 or more passenger to be entered.


Group		
Car Mileage <input type="text"/>		
Description		
0800-1600 Base to Moray Council – Elgin (Meeting)		
Date	Vehicle	User Type
01/09/2015	CR158BG	Pay32 Business
Actual Mileage	HQ/Base to Destination	Mileage
75	75	75
Est. Claim Value	Passengers	
£33.75	<input type="text"/>	

[+ Add Line Attachments](#) [OK](#) [Cancel](#)


The system has automatically calculated an estimated claim value

- 2.18 Click [Ok]

Journey will appear in summary sheet

Default Cost Centre - Open				
Date	Group	Type	Value	
01/09/2015	Car Mileage		75	 ▼
			Total Miles	75

A partly blank Claim form will appear (please note that date will appear – please amend)

Group 			
Car Mileage ▼			
Description			
<input type="text"/>			
Date	Vehicle	User Type	
01/08/2015	CR158BG ▼	Pay32 Short Term Car Hire Equivalent ▼	
Actual Mileage	HQ/Base to Destination	Mileage	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Est. Claim Value	Passengers		
£0.00	<input type="text"/>		

If you require to submit additional mileage claims then repeat steps 2.10 – 2.18


2.19.1 Short Term Car Hire Equivalent (mileage) and Short Term Car Hire

Where travel is required over 100 miles, short term car hire equivalent or public transport will be used where there is financial benefit to the Highland Council .

- Where an employee nevertheless chooses instead to use his/her own car for such journeys a “Short Term Car Hire” rate of £26.50 per day plus 13p per mile (Pay32 Short Term Car Hire Equivalent) can be claimed

It is important that both are claimed at the same time.

Example: Car Mileage

Group 			
Car Mileage ▼			
Description			
0900-1700 Base to Edinburgh (Meeting)			
Date	Vehicle	User Type	
09/09/2015	CR158BG ▼	Pay32 Short Term Car Hire Equiv ▼	
Actual Mileage	HQ/Base to Destination	Mileage	
200	200	200	
Est. Claim Value	Passengers		
£26.00	<input type="text"/>		

Example: Pay 32 Travel & Subsistence

When entering [Short Term Car Hire - £26.50], please ensure that the value is always set a [1.00] as you are claiming a daily rate. Should you wish to claim additional, please create a new claim line with the date of additional travel.

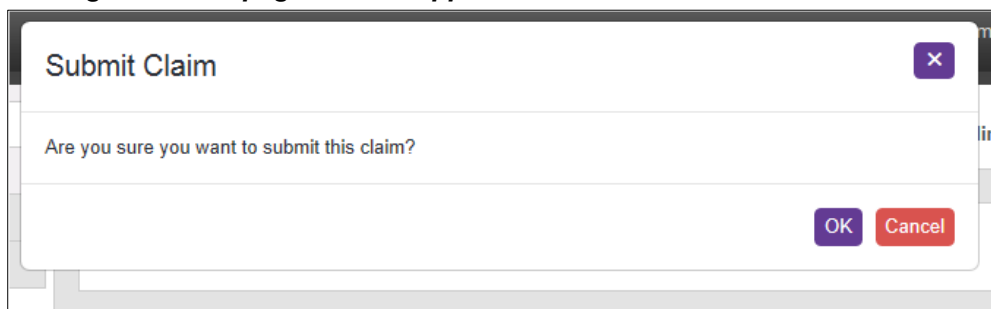
Group		Type	
Payroll 32 Travel & Subsistence		Short Term Car Hire - £26.50	
Description			
0900-1700 Base to Edinburgh (Meeting)			
Date	Value		
09/09/2015	1.00		

Although the value of the [Short Term Car Hire] shows as [£1.00], we can assure you the rate which you will be paid will be £26.50

If you click on [Save] this will allow you to leave the application and log back in at a later date and continue with your expense claim. However it is only when you click [Submit] that the claim will be sent to your Manager. To [Submit] continue as follows:

- 5.27 Click [Submit]

Message from webpage box will appear



The dialog box is titled 'Submit Claim' and contains the question 'Are you sure you want to submit this claim?'. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

- 5.28 Click [OK]

Submitted Summary page will appear

A confirmation email will be sent from the HR Portal to your Manager / Budget Holder to review
Process END

3 Miscellaneous Error Messages

You may get an error message advising “STOP” “MyView : Session Ended – Your request cannot processed at this time”. Click on the [**Return to home page**] button on the bottom right hand side of the screen to log back into your MyView session.

Please report this error to: FSAT advising what task you were trying to perform during your MyView session.

At the moment **you will not be able to access the MyView Self Service outside of the HC network**

3.1 Alerts

Please be advised that the following message is only an Alert – we ask that you have some patience and try again later
r to amend your existing details

