

MyView - submitting a mileage claim

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1. Submitting a mileage claim

If you are claiming Short Term Car Hire (using your own vehicle) and Short Term Car Hire Equivalent (mileage) then review section 2.

- 1.1 Under 'My Expenses' choose [create an expense claim] The 'Position' field should already be complete with your Job Title, if you hold more than one post choose the appropriate one. You can then complete the Description and Reason for claim fields and click [OK] then choose [Add Line] to begin your claim.



Position
Corporate Improvement Project Manager ▼

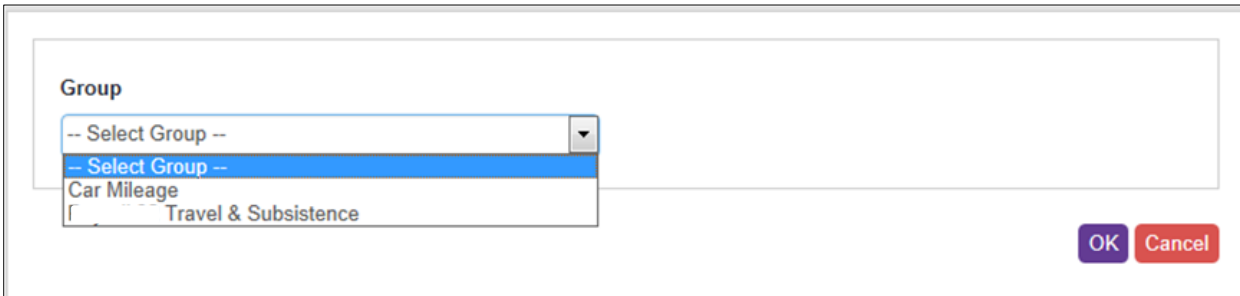
Description

Reason for Claim

OK

NOTE: The Description and Reason for Claim can be used to group claims for a whole month. Choosing a recognisable descriptor will assist should you wish to save and add to the claim throughout the month. To review or add to saved claims at a later date you should choose **[Saved and Historical Claims]** in the menu on the left.

- 1.2 At [Group], select the drop down menu



Group

-- Select Group -- ▼

-- Select Group --

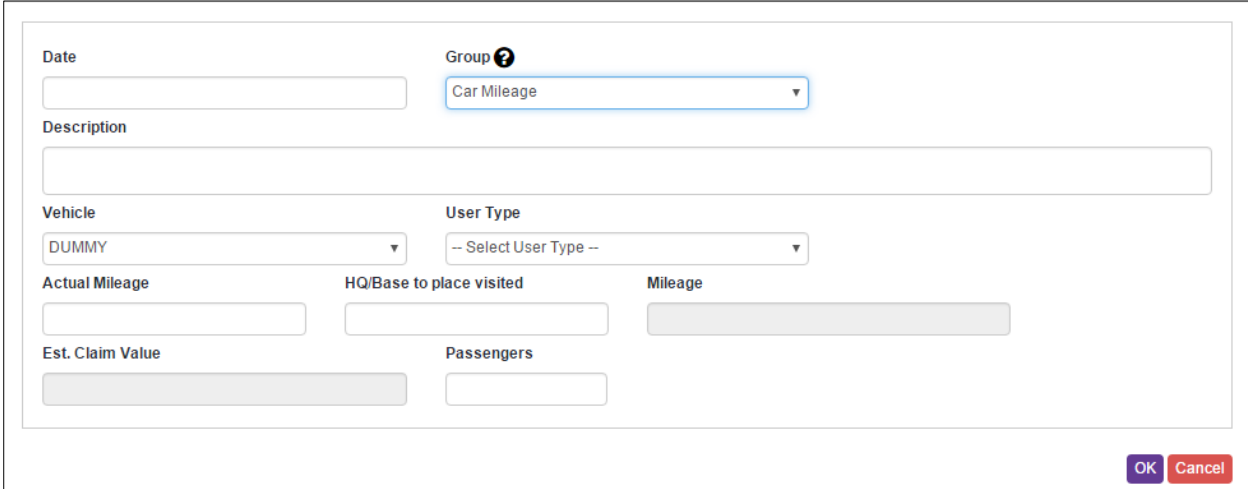
Car Mileage

Travel & Subsistence

OK Cancel

1.3 Select group [Car Mileage] –

Car Mileage claim form will appear



The screenshot shows a web form for a Car Mileage claim. The form includes the following fields and controls:

- Date:** A text input field.
- Group:** A dropdown menu with a question mark icon, currently showing 'Car Mileage'.
- Description:** A large text area for describing the journey.
- Vehicle:** A dropdown menu currently showing 'DUMMY'.
- User Type:** A dropdown menu currently showing '-- Select User Type --'.
- Actual Mileage:** A text input field.
- HQ/Base to place visited:** A text input field.
- Mileage:** A text input field.
- Est. Claim Value:** A text input field.
- Passengers:** A text input field.

At the bottom right of the form are two buttons: 'OK' (blue) and 'Cancel' (red).

1.3 At [Description], type journey description (purpose of journey) -
example: 0800-1600 Base to Moray Council – Elgin (Meeting)

1.4 At [Date], calendar will pop up on screen, select date of travel -

1.5 At [Vehicle], Leave as 'Dummy'

1.6 At [User Type], select the drop down menu.

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 **Business**. However, in the event of travelling from Home to Base you must choose **Business Taxable**.
- Essential Users on the Assessors payroll should select Essential User, Childrens Service users should select Business – ex NHS.
- If you are only claiming Excess or Secondment please choose the relevant option. For Bicycles or Motorcycle then select them respectively as above.
- Tusker car users must choose Salary Sacrifice (and the respective fuel type: petrol or diesel)

1.7 Select [User Type]

Date	Group ?	
16/02/2016	Car Mileage	
Description		
0800-1600 Base to Moray Council - <u>Elgin</u> Meeting		
Vehicle	User Type	
DUMMY	Business	
Actual Mileage	HQ/Base to place visited	Mileage
Est. Claim Value	Passengers	
£0.00		

OK Cancel

1.8 At [Actual Miles], enter total miles travelled in journey for that day.

1.9 At [HQ/Base to Destination], enter mileage travelled between Base and Destination and return

1.10 At [Passengers], enter number of passengers that travelled in the vehicle at time of journey.

If you are not travelling with a passenger then do not enter a value in this field.

Claiming for Passengers

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

For a journey between Inverness and Glasgow

Driver leaves Inverness and collects 1 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 passenger to be entered.

NOTE: Passenger names are not required to be recorded


Date	Group ?	
16/02/2016	Car Mileage	
Description		
0800-1600 Base to Moray Council - <u>Elgin</u> Meeting		
Vehicle	User Type	
DUMMY	Business	
Actual Mileage	HQ/Base to place visited	Mileage
75	75	75
Est. Claim Value	Passengers	
£33.75		

OK Cancel

The system will automatically calculated an estimated claim value

1.11 Select [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 so that you can continue to enter additional claim details (note that date will reappear – amend as appropriate)

If you require to submit additional mileage claims then repeat the previous steps.

2. Claiming Short Term Car Hire Equivalent rate plus mileage

Where travel is required over 100 miles, car hire or public transport should be used.

If an employee chooses to use their own car for such journeys a “Short Term Car Hire” rate of £26.50 per day plus 13p per mile can be claimed.

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

2.1 Firstly, claim for the mileage travelled by choosing ‘Car Mileage’ in the [Group] field and ‘Short Term Car Hire Equivalent’ in the [User Type] field as below and complete all other fields as appropriate (for further guidance see Submitting a Mileage Claim User Guide).

Date 16/02/2016		Group ? Car Mileage ▼	
Description 0800-1600 Base to Moray Council - <u>Elgin</u> Meeting			
Vehicle DUMMY ▼		User Type Short Term Car Hire Equivalent ▼	
Actual Mileage 75	HQ/Base to place visited 75	Mileage 75	
Est. Claim Value £9.75	Passengers 		

OK Cancel

2.2 Now claim for the short term car hire equivalent by choosing the Travel and subsistence claim form

Choose [Short Term Car Hire - £26.50] in the ‘Type’ field and ensure that the value field is always set at [1.00], this signifies that you are claiming a daily rate in addition to the lower mileage rate, then click [OK].

Should you wish to claim for additional days, create a new claim line with the date of additional travel.

Date	Group ?	Type
16/02/2016	Travel & Subsistence	Short Term Car Hire 26.50
Description		
0800-1600 Base to Moray Council - <u>Elgin</u> Meeting		
Value		
1.00		
		OK Cancel

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

2.3 Select [Submit]

Message from webpage box will appear

Submit Claim

Are you sure you want to submit this claim?

OK Cancel

2.4 Select [OK]

Submitted Summary page will appear. When claiming Short Term Car Hire equivalent, although the value of claim displays as £1.00, payment will be £26.50 (this is a known issue and is being investigated).

An email will be sent to your Manager asking them to approve the claim in MyView.