MyView - submitting a travel and subsistence claim

Contents

1.   Submitting a travel and subsistence 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 select [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], on drop down menu choose [Travel and Subsistence]

The Highland Council
Comhairle na Gàidhealtachd

Travel and Subsistence screen will appear

1.3   At [Type] select the drop down menu

1.4   Select [Subsistence Type]

1.5   At [Description] type in description of claim, for instance 08:00 – 16:00 Base to Elgin (Meeting with Moray) At [Date], calendar will pop up on screen, select date expense was incurred

1.6   with Moray) At [Date], calendar will pop up on screen, select date expense was incurred

1.7   ^· [Value], type in value of receipt.

NOTE: If you have claimed more than your allowance then a warning message will appear, amend your claim accordingly. This warning will also be flagged up to your Manager when asked to approve the claim.

1.8   Choose Add Line attachments and upload relevant receipts to support your claim. Ensure that you have scanned or photographed receipts and saved them on your computer ready for this part of the process. Multiple receipts can be saved in one file. Ensure that all detail is legible prior to attaching to the claim.

1.9   Select [OK]

Journey will appear in a summary sheet

Date	Group	Type	Value	
Default Cost Centre - Open				
01/09/2015	Payroll 32 Travel & Subsi...	Lunch (Â£10.00 max). If...	£8.50	🗑 ▾
01/09/2015	Car Mileage		75	🗑 ▾
			Total Value	£8.50
			Total Miles	75

If you select [Save] this will allow you to leave the application and log back in at a later date and add to or amend your expense claim.Only when you select [Submit] will the claim will be work-flowed to your Manager for approval. To [Submit] continue as follows:

1.9   Select [Submit]

Message from webpage box will appear

Submit Claim ✕

Are you sure you want to submit this claim?

OK Cancel
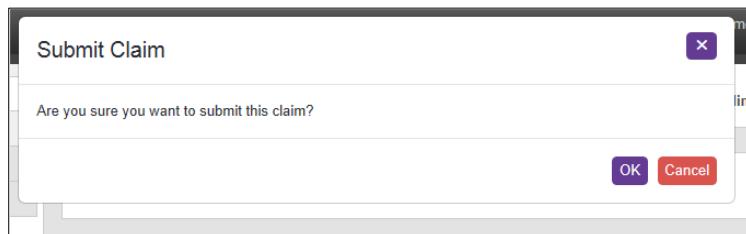
1.10   Select [OK]

Submitted Summary page will appear

Date	Group	Type	Value	
Default Cost Centre - Submitted				
01/09/2015	Car Mileage		75	▾
01/09/2015	Payroll 32 Travel & Subsi...	Lunch (Â£10.00 max). If...	£8.50	▾
			Total Value	£8.50
			Total Miles	75

An email will be sent to your Manager prompting them to login into MyView to review and approve your claim.

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).
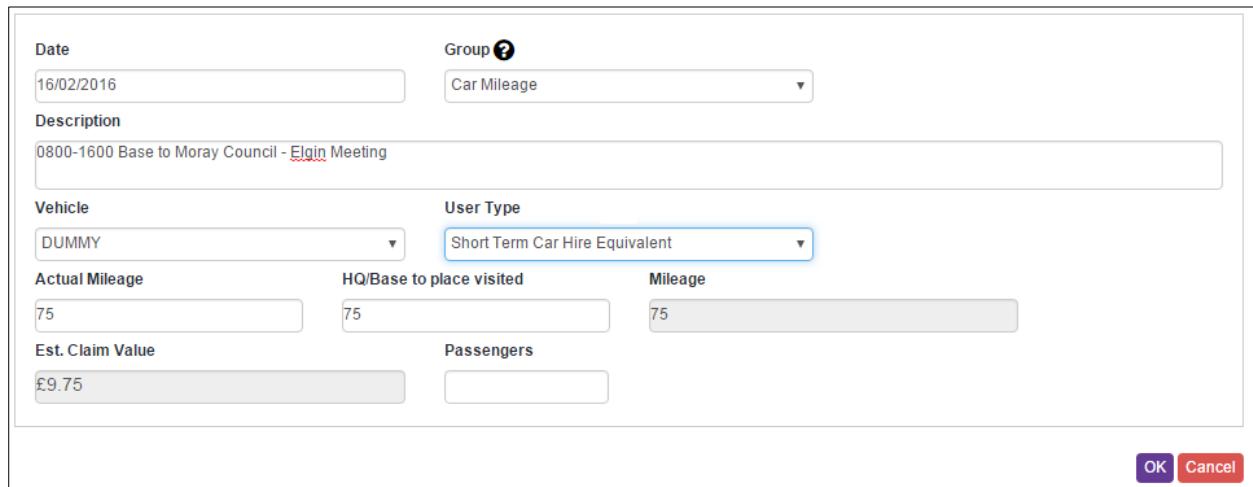
Date	Group ?
16/02/2016	Car Mileage ▼

Description

0800-1600 Base to Moray Council - Elgin Meeting

Vehicle	User Type
DUMMY ▼	Short Term Car Hire Equivalent ▼

Actual Mileage	HQ/Base to place visited	Mileage
75	75	75

Est. Claim Value	Passengers
£9.75	

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 select [OK].

Should you wish to claim for additional days, please create a new claim line with the date of additional travel.
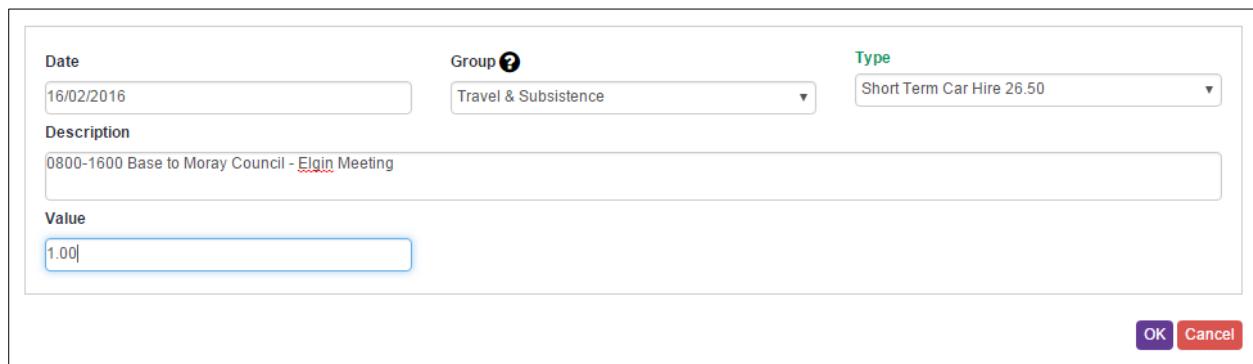
Date	Group ?	Type
16/02/2016	Travel & Subsistence ▼	Short Term Car Hire 26.50 ▼

Description

0800-1600 Base to Moray Council - Elgin Meeting

Value

1.00

OK   Cancel

If you select [Save] this will allow you to leave the My View and log back in at a later date and continue with your expense claim. It is only when you select [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
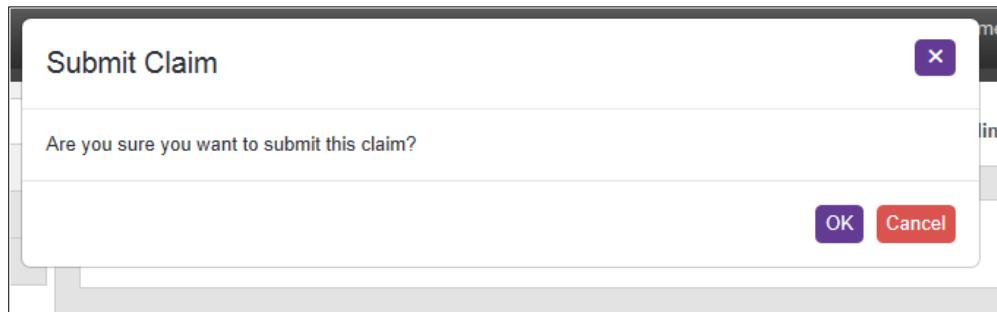
2.4   Select [OK]

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.