

Manager MyView

Approving or rejecting an expense claim

Document: Manager MyView – Approving or rejecting an expense claim

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1 Manager MyView – Approving an Expense Claim

Ensure that online expense claims are approved in line with payroll cut off dates so that claims are processed in time for the next payroll.

Only a Line Manager can approve expense claims forms. Before approving expenses, Managers are responsible for ensuring that expenses claimed are legitimate and that appropriate receipts have been attached electronically to all claims. Once approved, claims will be automatically forwarded to Payroll for payment.

Audit spot checks will be carried out on approved claims to ensure adherence to policy.

From your MyView Dashboard:

My People Authorisations

- Select [My People Authorisations]

Authorisations screen will appear

| Authorisation [You have 7 items awaiting authorisation] | | | | | Travel & Subsistence policy |
|--|----------|--------------------------------------|-------|--|-----------------------------|
|  | | | | | |
| Expense Claims | | | | | |
| Date | Time | Description | Value | | |
| 14/10/2015 | 18:50:06 | 01/09/15 30/09/15 September Expenses | 8.50 | | |
| 12/10/2015 | 17:26:05 | 01/08/15 31/08/15 August Expenses | 8.50 | | |

- Select [Expense Claim]

Expense Claims

| Date | Time | Description | Value |
|------------|----------|--------------------------------------|-------|
| 14/10/2015 | 18:50:06 | 01/09/15 30/09/15 September Expenses | 8.50 |

Employees should **ensure** that the Expense claim [Description] is easily recognisable to both employee and Manager as there may be multiple lines within the expense claim.

Example: Travel start and end dates: 01/09/2015 – 30/09/15 September Expenses

Employee Expense claim will appear

| Default Cost Centre - Submitted | | | | | |
|---------------------------------|-------------|---------------------------|-------------------------|--|-------|
| | Date | Group | Type | Value | |
| ✓ | 01/09/2015 | Car Mileage | | 75 | ▼ |
| ✓ | 01/09/2015 | Payroll 32 Travel & Su... | Lunch (£10.00 max).... | £8.50 | ▼ |
| | | | | Total Value | £8.50 |
| | | | | Total Miles | 75 |
| Authorisation/Rejection Notes | | | | | |
| Cancel | Total Lines | Total Value | Total Miles | <input type="button" value="Edit"/> <input type="button" value="Authorise"/> <input type="button" value="Reject"/> | |
| | 2 | £8.50 | 75 | | |

Manager can drill down into each line of the expense claim form by selecting the down arrow

| | | | | | | |
|---|---|------------|-------------|--|----|---|
| ✓ | ✗ | 01/09/2015 | Car Mileage | | 75 | ▼ |
|---|---|------------|-------------|--|----|---|

- Select down arrow to expand

Full expenses claim will be available to view

| Default Cost Centre - Submitted | | | | | |
|---|------------|--------------------------|----------------|------------------|---|
| | Date | Group | Type | Value | |
| ✓ | 01/09/2015 | Car Mileage | | 75 | ▲ |
| Group | | | | | |
| Car Mileage | | | | | |
| Description | | | | | |
| 0800-1600 Base to Moray Council – Elgin (Meeting) | | | | | |
| Date | | Vehicle | User Type | | |
| Sep 1, 2015 | | CR158BG | Pay32 Business | | |
| Actual Mileage | | HQ/Base to place visited | Mileage | Est. Claim Value | |
| 75 | | | 75 | £33.75 | |

- Manager should be satisfied that the employee has correctly detailed the reason for claim and that the expense was incurred appropriately.
- At [User Type], ensure that the mileage type chosen by employee is the correct one.

The Highland Council has a range of User (Travel) Types. Some examples are:

- If an employee is using their own private vehicle, they are classed as a Business user. Therefore, they would select **Business**. However, in the event of travelling from Home to Base they **must** choose **Business Taxable**.
- If an employee is only claiming Excess or Secondment or for Bicycle or Motorcycle there are also relevant options to choose.
- Tusker car users must choose **Salary sacrifice** (and the respective fuel type: Petrol, Diesel or BiFuel)
- Depending on your review, select either the tick to approve or the cross to reject the line.

| Default Cost Centre - Submitted | | | | | |
|---|------------|---------------------------|--------------------------|-------|---|
| | Date | Group | Type | Value | |
| <input checked="" type="checkbox"/> <input type="checkbox"/> | 01/09/2015 | Car Mileage | | 75 | ▼ |
| <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> | 01/09/2015 | Payroll 32 Travel & Su... | Lunch (Â£10.00 max).... | £8.50 | ▼ |
| | | | Total Value | £8.50 | |
| | | | Total Miles | 75 | |

If an employee has claimed [Short Term Car Hire - £26.50] the value will be shown in the claim as £1.00 but the employee will still be paid £26.50 as per policy.

| Default Cost Centre - Open | | | | | |
|----------------------------|------------------------------|-----------------------------|-------------|-------|---|
| Date | Group | Type | Value | | |
| 09/09/2015 | Payroll 32 Travel & Subsi... | Short Term Car Hire - Â£... | £1.00 | ▼ | ▼ |
| 09/09/2015 | Car Mileage | | 200 | ▼ | ▼ |
| | | | Total Value | £1.00 | |
| | | | Total Miles | 200 | |

- Continue through the expense claim form by going down to the next line and selecting the down arrow

| | | | | | |
|--|---|---|---------------------------------|-------------------------------------|-------------------|
| ✓ | ✗ | 01/08/2015 | Car Mileage | 75 | ▼ |
| ✓ | ✗ | 01/08/2015 | Payroll 32 Travel & Subsistence | Lunch (Â£10.00 max). If outwith... | £8.50 |
| Group | | Type | | | |
| Payroll 32 Travel & Subsistence | | Lunch (Â£10.00 max). If outwith HC VAT | | | |
| Description | | | | | |
| 08:00 – 16:00 Base to Elgin (Meeting with Moray Council) | | | | | |
| Date | | Value | | | |
| Aug 1, 2015 | | £8.50 | | | |
| | | | | | Total Value £8.50 |
| | | | | | Total Miles 75 |

➤ Review the line accordingly, paying particular attention to [Description] and [Type]

Ensure that:

- (i) All journeys have been necessarily undertaken while on Council business
- (ii) The expense has been incurred and the amounts claimed are strictly in accordance with the rates laid down by the Council
- (iii) The claim is strictly within the code of Conduct
- (iv) The claim has not been included under any other reimbursement scheme (such as excess travel or trade association)
- (v) Dates and times of travel have been included

➤ Depending on your review, select either the tick to approve or the cross to reject the line.

| Default Cost Centre - Submitted | | | | | |
|---------------------------------------|------|-------------|---------------------------|--------------------------|---|
| | Date | Group | Type | Value | |
| ✓ | ✗ | 01/09/2015 | Car Mileage | 75 | ▼ |
| ✓ | ✗ | 01/09/2015 | Payroll 32 Travel & Su... | Lunch (Â£10.00 max).... | £8.50 |
| | | | | | Total Value £8.50 |
| | | | | | Total Miles 75 |
| Authorisation Notes | | | | | |
| <input type="button" value="Cancel"/> | | Total Lines | Total Value | Total Miles | <input type="button" value="Edit"/> <input type="button" value="Submit"/> |
| 2 | | £8.50 | 75 | | |

➤ Select [Submit]

Claimant will receive an email advising that the claim has been approved and will be paid in the next pay run.

2 Rejecting an expense claim or lines within a claim

Employees can submit expense claims including multiple lines covering expenses incurred throughout the month. A Manager is able to approve or reject specific lines within the same claim instead of rejecting the full claim.

| Default Cost Centre - Submitted | | | | | |
|---------------------------------|------------|---------------------------|------------------------|-------|---|
| | Date | Group | Type | Value | |
| ✓ | 01/09/2015 | Car Mileage | | 10 | ▼ |
| ✓ | 01/09/2015 | Payroll 32 Travel & Su... | Lunch (£10.00 max).... | 11.50 | ▼ |
| | | | Total Value | 11.50 | |
| | | | Total Miles | 10 | |

- Depending on your review, select either the tick to approve or the cross to reject the line.

| Default Cost Centre - Submitted | | | | | |
|---------------------------------|------------|---------------------------|------------------------|-------|---|
| | Date | Group | Type | Value | |
| ✓ | 01/09/2015 | Car Mileage | | 10 | ▼ |
| ✓ | 01/09/2015 | Payroll 32 Travel & Su... | Lunch (£10.00 max).... | 11.50 | ▼ |
| | | | Total Value | 11.50 | |
| | | | Total Miles | 10 | |

- If you are rejecting a claim line, ensure that you complete Rejection notes

| | | | | | | | | | | | | | | | | | |
|--|-------------|-------------|-------------|------|--------|--------|-------------|-------------|-------------|------|--------|--|---|-------|----|--|--|
| Authorisation Notes | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | |
| Rejection Notes | | | | | | | | | | | | | | | | | |
| Claim rejected as the £11.50 value claimed is £1.50 outwith policy (£10 maximum), please resubmit this line | | | | | | | | | | | | | | | | | |
| <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; text-align: center; padding: 2px;">Cancel</td> <td style="width: 15%; text-align: center; padding: 2px;">Total Lines</td> <td style="width: 15%; text-align: center; padding: 2px;">Total Value</td> <td style="width: 15%; text-align: center; padding: 2px;">Total Miles</td> <td style="width: 15%; text-align: right; padding: 2px;">Edit</td> <td style="width: 15%; text-align: right; padding: 2px;">Submit</td> </tr> <tr> <td></td> <td style="text-align: center; padding: 2px;">2</td> <td style="text-align: center; padding: 2px;">11.50</td> <td style="text-align: center; padding: 2px;">10</td> <td></td> <td></td> </tr> </table> | | | | | | Cancel | Total Lines | Total Value | Total Miles | Edit | Submit | | 2 | 11.50 | 10 | | |
| Cancel | Total Lines | Total Value | Total Miles | Edit | Submit | | | | | | | | | | | | |
| | 2 | 11.50 | 10 | | | | | | | | | | | | | | |

- Select [Submit]

Claimant will receive two emails, first one advising that all the claim lines that were approved will be paid in the next payrun. The second advising that a line has been rejected with an explanation

| | |
|---|--|
| Please be advised that the following subsistence expense claim has been rejected: | |
| Claim Number: 0000003141 | |
| Claim Date: 01/09/2015 | |
| Claim Description: Training Course in Perth 01/09/15 | |
| Claim Total: 11.50 | |
| Rejection reason: Claim rejected as the £11.50 value claimed is £1.50 outwith policy (£10 maximum), please resubmit this line | |