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# Manager MyView

## Approving or rejecting an expense claim

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**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 – 30/09/2015 September Expenses**

### Employee Expense claim will appear

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

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

✓ x	01/09/2015	Car Mileage		75	▼
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- Select down arrow to expand

Full expenses claim will be available to view

Default Cost Centre - Submitted																							
	Date	Group	Type	Value																			
✓ x	01/09/2015	Car Mileage		75	▲																		
<b>Group</b> Car Mileage <b>Description</b> 0800-1600 Base to Moray Council – Elgin (Meeting) <table border="0"> <tr> <td><b>Date</b></td> <td><b>Vehicle</b></td> <td><b>User Type</b></td> </tr> <tr> <td>Sep 1, 2015</td> <td>CR158BG</td> <td>Pay32 Business</td> </tr> <tr> <td><b>Actual Mileage</b></td> <td><b>HQ/Base to place visited</b></td> <td><b>Mileage</b></td> </tr> <tr> <td>75</td> <td></td> <td>75</td> </tr> <tr> <td colspan="2"></td> <td><b>Est. Claim Value</b></td> </tr> <tr> <td colspan="2"></td> <td>£33.75</td> </tr> </table>						<b>Date</b>	<b>Vehicle</b>	<b>User Type</b>	Sep 1, 2015	CR158BG	Pay32 Business	<b>Actual Mileage</b>	<b>HQ/Base to place visited</b>	<b>Mileage</b>	75		75			<b>Est. Claim Value</b>			£33.75
<b>Date</b>	<b>Vehicle</b>	<b>User Type</b>																					
Sep 1, 2015	CR158BG	Pay32 Business																					
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75		75																					
		<b>Est. Claim Value</b>																					
		£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	
✓ x	01/09/2015	Car Mileage		75	▼
✓ x	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 & Subs...	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	▲
			<b>Group</b>	<b>Type</b>		
			Payroll 32 Travel & Subsistence	Lunch (Â£10.00 max ). If outwith HC VAT		
			<b>Description</b>			
			08:00 – 16:00 Base to Elgin (Meeting with Moray Council)			
			<b>Date</b>	<b>Value</b>		
			Aug 1, 2015	£8.50		
					<b>Total Value</b>	£8.50
					<b>Total Miles</b>	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	
					<b>Total Value</b>	£8.50
					<b>Total Miles</b>	75
Authorisation Notes						
		<b>Total Lines</b>	<b>Total Value</b>	<b>Total Miles</b>		
		2	£8.50	75		

Cancel
Edit Submit

➤ 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	
✓	x	01/09/2015	Car Mileage		10	▼
✓	x	! 01/09/2015	Payroll 32 Travel & Su...	Lunch (Â£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	
✓	x	01/09/2015	Car Mileage		10	▼
✓	x	! 01/09/2015	Payroll 32 Travel & Su...	Lunch (Â£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									
<div> <div>Cancel</div> <table border="1"> <tr> <th>Total Lines</th><th>Total Value</th><th>Total Miles</th></tr> <tr> <td>2</td><td>11.50</td><td>10</td></tr> </table> <div>Edit Submit</div> </div>				Total Lines	Total Value	Total Miles	2	11.50	10
Total Lines	Total Value	Total Miles							
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

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