

iTrent Self Claiming Time & Expenses (Schools) User Guide



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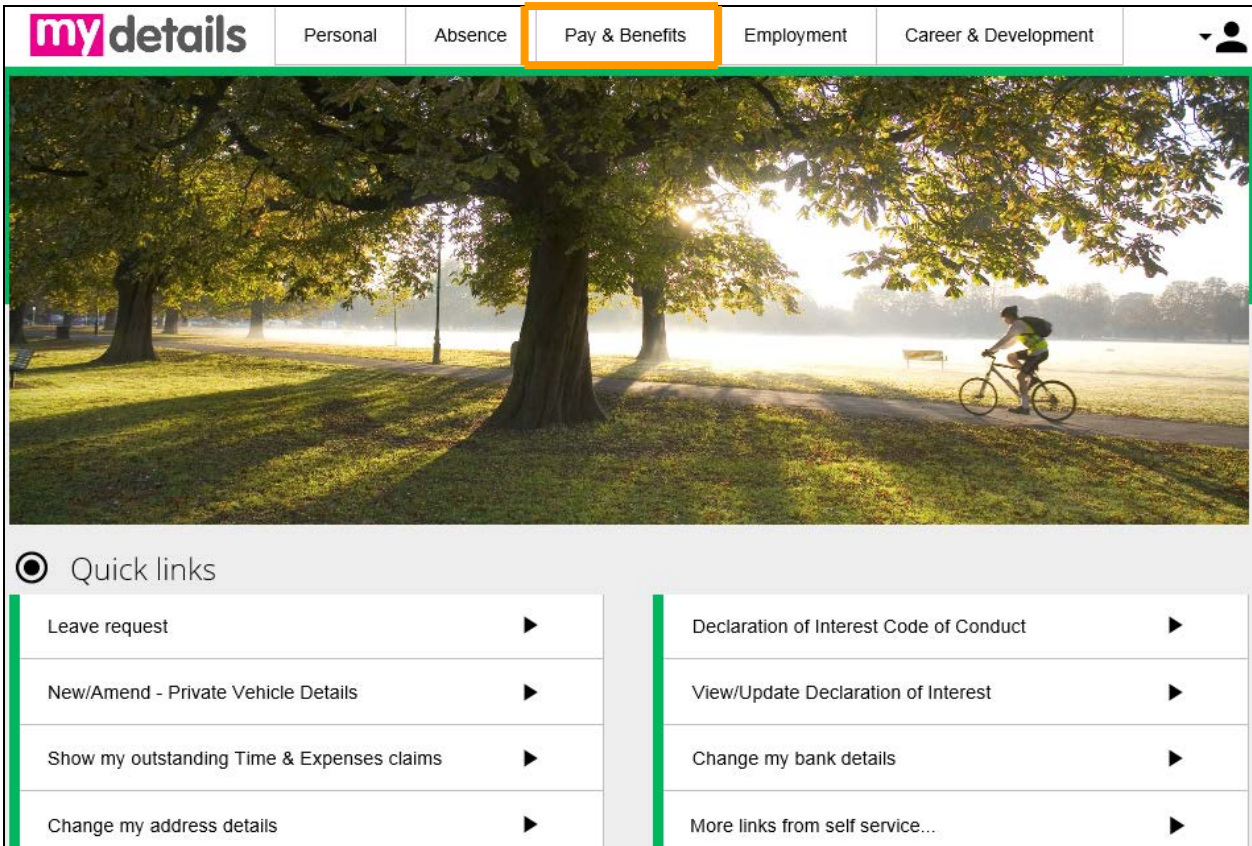
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1. Introduction

Log on to the home page.

The template for submitting an expense claim is under the Pay & Benefits tab. Both expenses and mileage are submitted using the same form.



The screenshot shows the 'my details' web interface. The navigation bar includes tabs for 'Personal', 'Absence', 'Pay & Benefits' (highlighted with an orange box), 'Employment', and 'Career & Development'. Below the navigation bar is a large image of a person cycling on a path through a park. Underneath the image is a 'Quick links' section with a search icon and a list of links:

Quick links	
Leave request	▶
New/Amend - Private Vehicle Details	▶
Show my outstanding Time & Expenses claims	▶
Change my address details	▶
Declaration of Interest Code of Conduct	▶
View/Update Declaration of Interest	▶
Change my bank details	▶
More links from self service...	▶

2. Private vehicles

When a personal vehicle is used for business the car details must be held against any claim.

Under the Personal tab select Private Vehicles + New vehicle




The screenshot shows a search bar containing the text 'Private vehicles'. To the right of the search bar is a green button with a white plus sign and the text 'Add vehicle', which is highlighted with an orange box.

The start date of the vehicle must be the same as or prior to the start date of the initial claim. If the make and model are not listed please contact itrentsupportteam@ealing.gov.uk. Enter all the details and save.

3. Saved journeys

Up to 20 regular journeys can be saved and pulled directly through to a claim to reduce the need to input repetitive data.

Under the Pay & Benefits tab select Save Journeys + Add journey



The screenshot shows a search bar containing the text 'Saved journeys'. To the right of the search bar is a green button with a white plus sign and the text 'Add journey', which is highlighted with an orange box.

Enter the details, tick the Active box and save.

Saved journey

Journey Name

Journey Type

Please choose

Miles claimed

Active

From

To

Comments 1

The page will then return to the main Pay & Benefits screen and Saved Journeys will now be displayed.

Saved journeys

You have 15 of your 20 'personalised journey' allocation remaining.

Journey name

- Acton House
- Ealing Education Centre
- Greenford
- LM Secondary School

To remove a saved journey from view, click on the grey icon at the side of the journey name and un-ticking the Active box.

To reactivate a removed journey click the magnifying glass icon  and select a criteria.

Saved journey search

Search inactive

Exclude Inactive

Include Inactive

Only Inactive

Choose the inactive journey from the returned list, open the journey page and tick the active box and save.

4. Entering a claim

Select Time & Expenses + Add claim under the Pay and benefits tab.



The start date can be either the 1st of the current month or the date of the earliest claim.

Select the correct job if there is more than one and the template **Ealing Exp & Mileage** from the drop down lists. Then click the blue NEW button.

A screenshot of a web form titled 'Time and expenses' with a green header and a white body. The form contains the following fields:

- Time & Expenses claim entry:** New
- Start date:** A text input field with a calendar icon to its right.
- Job title:** A dropdown menu with the selected value 'iTrent System Officer - 0047529A'.
- Claim template:** A dropdown menu.

Below the form fields is a section titled 'NOTES' in red, containing five numbered instructions:

- 1) If this is your FIRST mileage claim , please ensure you set up your car details on Self Service (Personal Details > Private Vehicles). If you have changed cars, please also update the details.
- 2) Please ensure you have Receipts for all items claimed including Petrol Receipts for mileage claimed. These will need to be scanned and attached to the claim.
- 3) If you are applying for either a Season Ticket Loan or Career Development Loan, you will need to scan and attach the application form to the claim. Once the purchase has been made, evidence of the purchase should be shown to your Manager. Using these loans for any other purpose other than what it has been claimed for, will result in disciplinary action being taken against you.
- 4) [Click for Expense Guidelines](#)
- 5) [Click for Mileage Guidelines](#)

The template has 3 pages:
Page 1 Expense claim form
Page 2 Mileage claim form
Page 3 Standard journey mileage claim form

5. Page 1 – Expenses

Select the type of expense from the first drop down list.

Enter the date of the expense using the calendar and a receipt number which is just a reference so payroll can check the attachments easily.

Detail the expense in a free text field and enter the amount to be claimed.

Please note that if the amount filed is not completed a payment will not be made.

Cost codes default to that of the person making the claim, only complete this field if payment is coming from a different department/service.

Add additional lines by clicking the + at the end of the row.

Time & Expenses claim entry: (New)

Job title: iTrent System Officer
Employee: Miss Jayne L Smith

Page 1 | Page 2 | Page 3

Expense Claim Form

Page 1 - Expenses
Page 2 - Mileage (non Standard Journeys
Page 3 - Mileage Standard Journeys
[Click for Expense Guidelines](#)

Date	Receipt Number	Detail of Expense	Cost Code	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>

6. Page 2 – Mileage (non-standard journeys)

Select the vehicle registration number and the scheme type.

Scheme types: Bicycle
Casual in borough
Motorcycle
Out of borough

Employee: Miss Jayne L Smith

Page 1 | Page 2 | Page 3

Mileage Claim Form

Page 1 - Expenses
Page 2 - Mileage (non Standard Journeys
Page 3 - Mileage Standard Journeys
[Click for Mileage Guidelines](#)

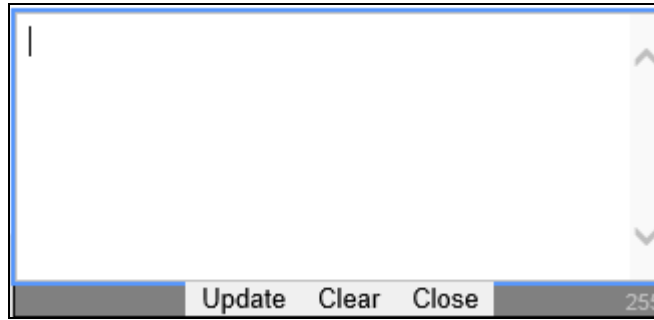
I confirm that my car is insured, roadworthy, fit for it's purpose and has a current MOT certificate (if applicable).
I further confirm that I hold a valid driving license which permits me to legally drive this vehicle.

If you are claiming for more than one scheme eg. out of borough and casual in borough, you will need to complete an additional claim form.

Vehicle	Scheme	Cost Code
<input type="text" value="LM55 TZP"/>	<input type="text" value="CASUAL IN BOROUGH"/>	<input type="text"/>

Journey Date	Miles claimed	Journey From	Journey To	Reason for Journey	Fuel Receipt Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

The reason for journey field can be double clicked to expand it to allow for 255 characters, once completed, select Update to close.



7. Page 3 – Mileage standard journeys

Select the vehicle registration number and the scheme type.

- Scheme types:
- Bicycle
 - Casual in borough
 - Motorcycle
 - Out of borough

Select the journey from the drop down list and enter the date.
The other fields will be automatically populated except for the Reason which needs to be entered.

Vehicle		Scheme		Cost Code		
LM55 TZP		CASUAL IN BOROUGH				
Journey	Journey Date	Miles claimed	Journey From	Journey To	Reason for Journey	Fuel Receipt Number
Acton House		20	Perceval House	Acton House		

Add additional lines by clicking the + at the end of the row.

A draft can be saved at any time and can be added to at a later date. Click the green Save draft button



8. Submitting the claim

Once the claim is complete, click the submit button to go to the Time & Expense Claim Submission Page.

Time & Expenses claim submission:
Claim template
Ealing Exp & Mileage
Job title
iTrent System Officer
Time and expenses claim reference
EEXP0000005648
Payroll
MGEN
Start date
01/06/2016
Cut off date
12/07/2016 - This claim will not now be paid until 26/08/2016.
Comments
Please ensure that you have attached your receipts before submitting the claim. I certify that the information that I have provided is a true record of expenses that I have necessarily incurred in the course of my official duties and that all the relevant receipts and documentation are attached. Spot checks will be performed each month and fraudulent claims will be dealt with in accordance with the policy.

9. Attaching receipts

All relevant receipts and documents need to be attached to the claim.

Click on the + Receipt attachments.

Password
<input type="text"/>
+ Receipt attachments
Submit

Select the receipt type from the drop down list and browse folders for the scanned receipts/documents.

Once the file has been selected, click the paperclip icon to the right of Browse. Failure to do this means the document is not locked in the system.

Enter the password and Submit.

10. Authorisation

Claims go straight to payroll for authorisation and a return email is sent to the claimant's manager to summarise the claim.

11. Claim Status

In the Time & Expenses area provisional claims are located and can be opened and added to or submitted.

12. Search for authorised claims

Click the magnifying glass and search on a claim period.

Enter the dates and search.

✕
Time and expense search

Start date (dd/mm/yyyy)

End date (dd/mm/yyyy)

Results: 2 items

Ealing Exp & Mileage

Start date 1 Jan 2016 Reference EEXP0000005647
 Cut off date 12 Jul 2016
Authorised

Summary

Ealing Exp & Mileage

Start date 1 Nov 2015 Reference EEXP0000002021
 Cut off date 6 Nov 2015
Authorised

Summary

Click summary to open the details of the claim.

13. Capping Limits

To ensure there are no excessive claims, a system of capping system is applied, for example the cost of a hotel room or a train ticket. If the claim is higher than the capped amount, only the capped amount will be paid.

<p>*Hotel Accommodation</p> <p>You will not be reimbursed for alcohol consumed with any meal, nor will you be reimbursed for any additional hotel expenses, for example, newspapers, mini bar, gratuities, film/satellite TV subscriptions etc.</p>	<p><i>Up to £120.00 per night</i></p>
<p>Breakfast</p> <p>Where an employee is on Council business not as part of “business as usual”, breakfast expenses will not be reimbursed where an employee leaves home after 7.00 am.</p>	<p><i>Up to £8.00</i></p>
<p>Lunch</p> <p>You will not be reimbursed for alcohol consumed with any meal.</p>	<p><i>Up to £10.00</i></p>

<p>Evening Meal</p> <p>You will not be reimbursed for alcohol consumed with any meal.</p> <p>Expenditure on evening meals will not be reimbursed where an employee can reach his/her home by 8.00pm.</p>	<p><i>Up to £30.00</i></p>
<p>*Train Travel</p> <p>Standard Class Only - no expenses will be paid for First Class Travel</p>	<p><i>Up to £100.00 per return journey</i></p>
<p>Taxi Travel</p> <p>Where it is considered essential to the requirements of the service to provide occasional car transport (e.g. for the movement of a client or equipment) and/or there is no other suitable alternative then the Service Head may authorise the use of an appropriate licensed taxi or private hire vehicle. (This will not apply for those employees who for historical reasons still receive an essential car user's allowance).</p>	<p><i>Up to £30.00 per individual journey</i></p>
<p>Tube/Bus Travel</p> <p>Where an employee regularly purchases a travel card for travelling to and from work, that travel card should be used for business use when required and therefore, such journeys should not be claimed as an expense.</p> <p>You will be able to claim for legitimate "pay as you go" expenses.</p>	<p><i>Up to £12.00 per day</i></p>
<p>*Air Travel</p>	<p><i>This must be preauthorised by an Executive Director before booking tickets</i></p>
<p>Contribution to eye test</p>	<p><i>Up to £23.00</i></p>
<p>Contribution to cost of glasses</p>	<p><i>Up to £65.00</i></p>
<p>Long Service Award</p>	<p><i>Up to £738.00</i></p>

14. Guidelines for submitting VAT receipts with car mileage claims

With effect from 1 April 2006, the HMRC have stated that employees claiming car mileage must also include with their claim a VAT receipt for fuel purchased. VAT receipts are readily available on request from your petrol station.

Where there are no receipts attached to the claim, claims will not be paid and will be returned to the employee via the reject process on self service.

Below are details of what is deemed an acceptable number of miles in comparison to the receipts attached. For example, if the total claim for the month amounts to 100 miles, then the receipts attached should be for no less than £11.00, similarly, if the claim is for 1000 miles then there should be no less than £112.00 in receipts attached.

Mileage claim received	Petrol receipt for (minimum accepted)
Less than 50 miles	£ 5.00
Less than 100 miles	£ 11.00
Less than 150 miles	£ 16.50
Less than 200 miles	£ 22.00
Less than 250 miles	£ 28.00
Less than 300 miles	£ 33.00
Less than 350 miles	£ 38.00
Less than 400 miles	£ 44.00
Less than 450 miles	£ 50.00
Less than 500 miles	£ 55.00
Less than 550 miles	£ 61.00
Less than 600 miles	£ 66.00
Less than 650 miles	£ 72.00
Less than 700 miles	£ 77.00
Less than 750 miles	£ 83.00
Less than 800 miles	£ 89.00
Less than 850 miles	£ 94.00
Less than 900 miles	£ 100.00
Less than 950 miles	£ 105.00
Less than 1000 miles	£ 112.00
Less than 1050 miles	£ 117.00
Less than 1100 miles	£ 122.00
Less than 1150 miles	£ 128.00
Less than 1200 miles	£ 134.00
Less than 1250 miles	£ 139.00
Less than 1300 miles	£ 145.00
Less than 1350 miles	£ 150.00
Less than 1400 miles	£ 156.00
Less than 1450 miles	£ 161.00
Less than 1500 miles	£ 167.00