

Employee Self Service: Enter Expenses

This guide will help you use Employee Self-Service to make expenses and mileage claims.

Remember, expenses must be submitted and approved on, or before the 10th of the month to ensure payment in that month's pay. Claims submitted or approved after this date will be automatically paid the following month.

Creating a new claim:

1. Click on 'Enter online expenses' in the Employee Self-Service menu.
2. You will be taken to the 'Expenses Guidance and Home Page'.
3. To start a new claim, click on 'Create New Claim' button.
4. Select the assignment the claim is for by clicking on the pencil icon.
5. Choose the month the claim was incurred - you can claim for the current month or 3 previous months.
6. You will be taken to the 'Enter Expenses' screen.

Enter Expenses:

The 'Enter Expenses' screen is where you will enter the details of your claim.

Your expense claim information and the vehicle details that are held on the system will be displayed. The 'CC' banding field allows car users to record an alternative engine size if a different vehicle from normal was used.

Choose the 'Mileage Expense Entry' or 'Other Expense Entry' tab as required.

Mileage Expenses:

You will be presented with the mileage expense entry screen. You need to input:

1. Date of your journey - use the calendar icon to select the date
2. Journey From - enter where your journey began
3. Postcode (from) - enter the post code of where your journey began
4. Journey To - enter the destination of your journey
5. Postcode (to) - enter the post code of where your journey ended
6. Purpose of journey - briefly explain the reason for your journey
7. Passengers - enter the number of passengers in the car if applicable

8. Return - if it was a return journey, click in this box
9. Actual mileage - you must enter the actual miles travelled. Please note that if you clicked on the return box, you will still have to enter your return mileage
10. Miles claimed - this is the number of miles you travelled excluding your home to office mileage (if your journey started or ended at home)
11. Receipt - if you have a VAT receipt for fuel, click on the receipt box. You can attach an image of the receipt on the Review and Submit screen.
12. Cost code (Non-Default) - this should be left blank unless the claim needs to be paid from a cost code other than your default cost code.
13. When you have entered the claim details, click on the 'Commit to Claim' button. The claim details will be recorded and will appear in the 'Mileage Claim Details' area of the screen. The input row will now be clear for you to input a new claim line if required.

Other Expenses:

Select the 'Other Expense Entry' tab if you need to claim expenses other than mileage:

1. Date - use the calendar icon to select the date you incurred the expense.
2. Expense Type - choose from the claim types displayed in the drop-down list.
3. Reason for Expense - add the reason for the expense.
4. Amount - enter the amount of the money incurred for the expense (you do not need to enter the £ symbol).
5. Receipt - click on the box if you have a receipt. You can attach an image of the receipt on the Review and Submit screen.
6. Cost code (Non-Default) - this should be left blank unless the claim needs to be paid from a cost code other than your default cost code.
7. When you have entered the claim details, click on the 'Commit to Claim' button. The claim details will be recorded and will appear in the 'Other Expense Claim Details' area of the screen. The input row will now be clear for you to input a new claim line if required.

On-screen buttons to help make entering your claim information quick and easy

To use the following buttons, you will need to click the 'Select' box on the relevant row within the 'Claim Details' area of the screen:

- 'Copy Row' - copies the information in the selected row and displays it in the claim input row. This is useful if, for example, you make regular journeys to the same location, as you can then just change the date of travel.
- 'Delete Row' - will remove the selected row altogether
- 'Update Row' - allows you to update the selected row and make any required changes. You will need to click on the 'Commit to Claim' button again for your amendments to take effect.
- 'Clear Input Row' button - if you have started to enter a claim line but do not wish to continue, clicking this button will make the input row blank.

When you have finished entering your claim information you have several options:

'Save for later' button - allows you to save your claims. You can then make changes or add additional claims for that month at a later date. Your claim will be listed in the table at the bottom of the Expenses Home Page. The status of the claim will be 'Saved for Later'.

Refer to the 'To check or update an existing claim or view your claim history' section for guidance on how to progress a 'saved for later' claim.

'Confirm Claim Details' - when you click on this button you will be taken to the 'Review and Submit' screen. You should check the information you have input. If you need to make any amendments to the claim, select 'Edit Claim Details', which will take you back to the previous screen.

You can attach copies of your receipts by using the 'Add Attachment' button at the bottom of this page. Please refer to the Receipt section for details of how to attach receipts.

If the details of your claim are correct, click on the 'Submit claim' button. The claim will be submitted to your line manager for approval. You will receive a confirmation e-mail when it has been approved.

To check or update an existing claim or view your claim history

- The table at the bottom of the Expenses Home Page lists your claim history. The status of the claim will be displayed, for example, 'Complete', 'In Progress', 'Saved for Later', 'Submitted for Approval', 'Returned for Correction', 'Rejected' or 'Error'.
- To access a claim, click in the 'Select' circle next to the appropriate claim, and then click on the 'View Claim Details' button.
- For claims that have not yet been submitted, you can then click on the 'Edit Claim Details' button and make changes/add claim rows as necessary.
- If required, you can export a summary of all your Self-Service claims by clicking 'Export Claim Summary'. Or you can export the full details of an individual claim by selecting a claim and clicking 'Export Claim Details'.

Receipts:

You are required to submit receipts with your expense claims, for example, fuel receipts and receipts for car parking tickets. Your manager may ask to check your receipts prior to approving your claim. VAT receipts are required for most expenses (including fuel) and have a VAT number.

By providing VAT receipts for fuel, Kent County Council can claim back the VAT. **If you do not provide a VAT receipt for fuel and the receipt box on the claim is not ticked, the reimbursement you receive will be reduced to compensate for the non-recovery of VAT.**

Attaching receipts to your Self-Service claim:

You will need to scan or take a photo of your receipt/s and save these files to the device (computer/tablet/smart phone etc) that you will use to log onto Employee Self-Service and enter your expenses.

On the Expenses Review and Submit screen, go to the Attachments section at the bottom of the page. Hover over the 'Add Attachment' button and an 'Add Attachment' pop-up window will appear. Complete the following steps:

- Attachment Type: this must be set to 'File'.
- Title: provide a title for the receipt e.g. Petrol receipt

- File: click on the Browse button to open the 'Choose File to Upload' window. Find the document you wish to attach and click on Open.
- Click on Save. A confirmation message will advise that the attachment has been added successfully.
- The attachment details will be displayed within the Attachments section on the Review and Submit screen.
- You can attach further receipts as required. You can update or delete attachments that you have already added.

When you submit your claim, the receipt attachments will be included. Your manager will be able to view and check these as required.

If you do not attach copies of your receipts to your Self-Service claim, your manager may ask to check your hard copy receipts. Once your claim has been approved, you must submit the receipts using a pre-printed expense envelope. On the reverse of the expense envelope fill in:

- Your Expenses Reference Identifier (a reference code displayed on the screen when you make your claim. This is also confirmed on the submission confirmation screen and on the Expenses Home Page.
- Your Oracle Assignment Number (OAN) that this claim has been made against
- Your name
- The month and year the claim is for

When sending the expense envelope, place it in the internal post system if possible. The envelopes are pre-paid so can be sent in the external post if required. Before sending the original receipts, you should take copies if you need these for your own records.

To request a supply of expenses envelopes, you need to raise an HR related call in Service Now (refer to the Help & Support section below on how to do this).

Help and Support:

If you have any technical issue, log into Service Now and raise a call by selecting the 'ICT' Service on the left hand side of the screen or alternatively use the 'Chat' function. If you are not able to access Service Now, e-mail ICTservicedesk@cantium.solutions and they will raise a request on your behalf.

If you have an HR related query, log into Service Now and raise a call by selecting the 'Human Resources' Service on the left hand side of the screen or alternatively us the 'Chat' function.

