

Schools expenses and submission

- View expenses claim form information for all staff
 - Ability to enter a new expense claim on behalf of a school employee
1. How to process an expense claim for an employee – see below
 2. Create a new claim form and complete
 3. Attach receipts
 4. **Claim submission – Please follow this final step to ensure payment**

Select employee >

Select Payroll information > New expense claim

LINKS

> Employment Details/Changes > Personal information > Attachments and Letters > Checks & Right to Work

> Learning/Training > Leaver information > Absence - Holiday & Other > Absence - Sickness

> Absence - Maternity/Paternity **▼ Payroll information**

☰ ☰

Fast input - Temporary input only View/Amend Temporary Input (Current month) View Temporary Input (Historical months)

Temporary element details - New View expense claim View expense receipts **New expense claim** Add expense receipts

Time & Expenses claim submission Time & Expenses claim summary

Time & Expenses claim

The screenshot shows the 'Time & Expenses claim' form. At the top, there is a field for 'Employee name'. Below this is a dark header bar with 'Time & Expenses claim New' and a 'MENU' dropdown. To the right of the header are icons for refresh, print, and upload. The main form area contains several fields: 'Start date' with a calendar icon, 'Job title' with a dropdown menu showing 'Job title (position)', and 'Claim template' with a dropdown menu. A red box on the left contains the following text: 'Start date – date of expense', 'Claim template Drop down select', 'Ealing Exp & Mileage', and 'Select' with a 'NEW' button. Red arrows point from the text in the red box to the corresponding fields in the form. At the bottom of the form is a blue 'NEW' button.

Claim template

Time & Expenses claim New MENU 🔄 🖨️ 📎

Employee:

Job title:

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Expense Claim Form

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

Select drop down to access list of expense types

| Element | Date | Receipt Number | Detail of Expense | Amount |
|-------------------------------|------|----------------|-------------------|--------|
| <input type="text" value=""/> | | | | 0.00 |

SAVE

Complete claim form - example

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Expense Claim Form

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| Element | Date | Receipt Number | Detail of Expense | Amount | |
|-----------------|---|----------------|-------------------|--------|----------------------------------|
| Tube/Bus Travel | <input type="text" value="01/06/2020"/> | 1 | meeting | 2.00 | <input type="text" value="+ -"/> |
| | | | | 2.00 | |

SAVE **DELETE** **NEW**

To add a new line/additional entry Select **+** or to delete a line select **-** and **SAVE**

Attach receipt/s

***** Important: Please ensure receipts are attached prior to approving the claim**

The screenshot shows the 'Expense Claim Form' interface. At the top, there is a header with 'Employee name' and a notification 'Changes have been saved.' Below the header, the form includes fields for 'Employee name', 'Job title (position)', 'Reference: EEXP0000000704', and 'Payroll: MSCH'. A navigation bar at the top indicates 'Time & Expenses claim Ealing Exp & Mileage'. A sidebar on the right contains a 'Document attachments' section with a 'Notes' field and a paperclip icon. A red box highlights the paperclip icon with the text 'Attach receipt Select Paperclip icon'. Another red box highlights the 'Document attachments' section. Below the form, there are links for 'Page 1 | Page 2 | Page 3' and 'Expense Claim Form'. A table at the bottom shows a list of expenses:

| Element | Date | Receipt Number | Detail of Expense | Amount | |
|-----------------|------------|----------------|-------------------|--------|-----|
| Tube/Bus Travel | 01/06/2020 | 1 | meeting | 2.00 | + - |

Complete Document attachment

The screenshot shows the 'Document attachment details' form. The form includes fields for 'Document', 'Document type', 'Last updated date', 'Last updated time', and 'Filename'. A 'Select a file ...' field is followed by a 'Browse...' button. A green 'SAVE' button is located at the bottom. A red box highlights the 'Document' field with the text 'Document - Name of receipt'. Another red box highlights the 'Document type' field with the text 'Document type - select drop down - select Expenses receipt'. A third red box highlights the 'Select a file and Browse for attachment and' text with the text 'Select a file and Browse for attachment and'. A green 'SAVE' button is also highlighted.

Document attachment details receipt LESS

Fast input - Temporary input only | View/Amend Temporary Input (Current month)

View Temporary Input (Historical months) | Temporary element details - New | View expense claim

View expense receipts | New expense claim | Add expense receipts

Time & Expenses claim submission | Time & Expenses claim summary

Document receipt

Document type Expenses Receipts

Last updated date 03/08/2020

Last updated time 17:41

Filename Expenses Train TEST.pdf

Replace by ... Browse...

DOWNLOAD SAVE DELETE NEW

and 


Time & Expenses claim Ealing Exp & Mileage MENU

Employee:

Job title:

Reference: EEXP0000000704

Payroll: MSCH

Attached receipt highlighted in blue 

Page 1 | Page 2 | Page 3

Expense Claim Form

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| Element | Date | Receipt Number | Detail of Expense | Amount | |
|-----------------|--|----------------|-------------------|--------|-----|
| Tube/Bus Travel | <input checked="" type="checkbox"/> 01/06/2020 | 1 | meeting | 2.00 | + - |
| | | | | 2.00 | |

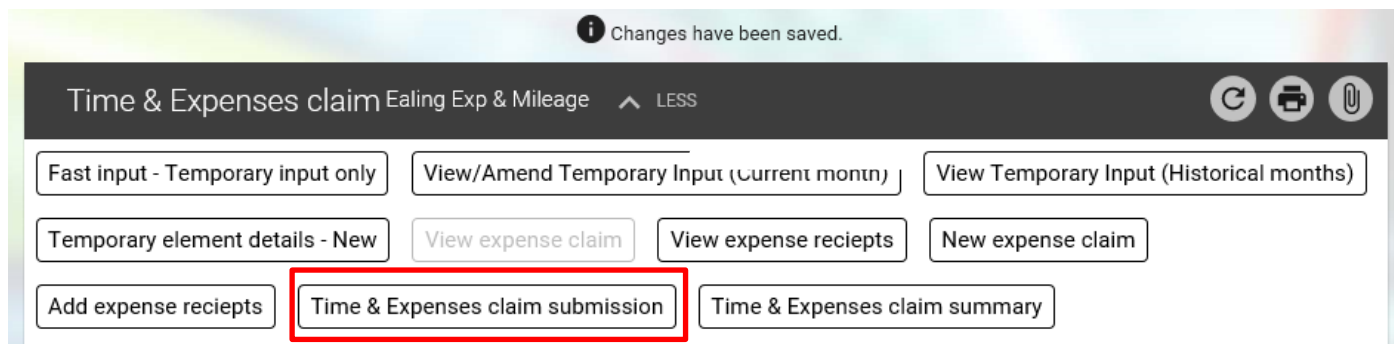
SAVE DELETE NEW

Claim is now SAVED as "Provisional" status

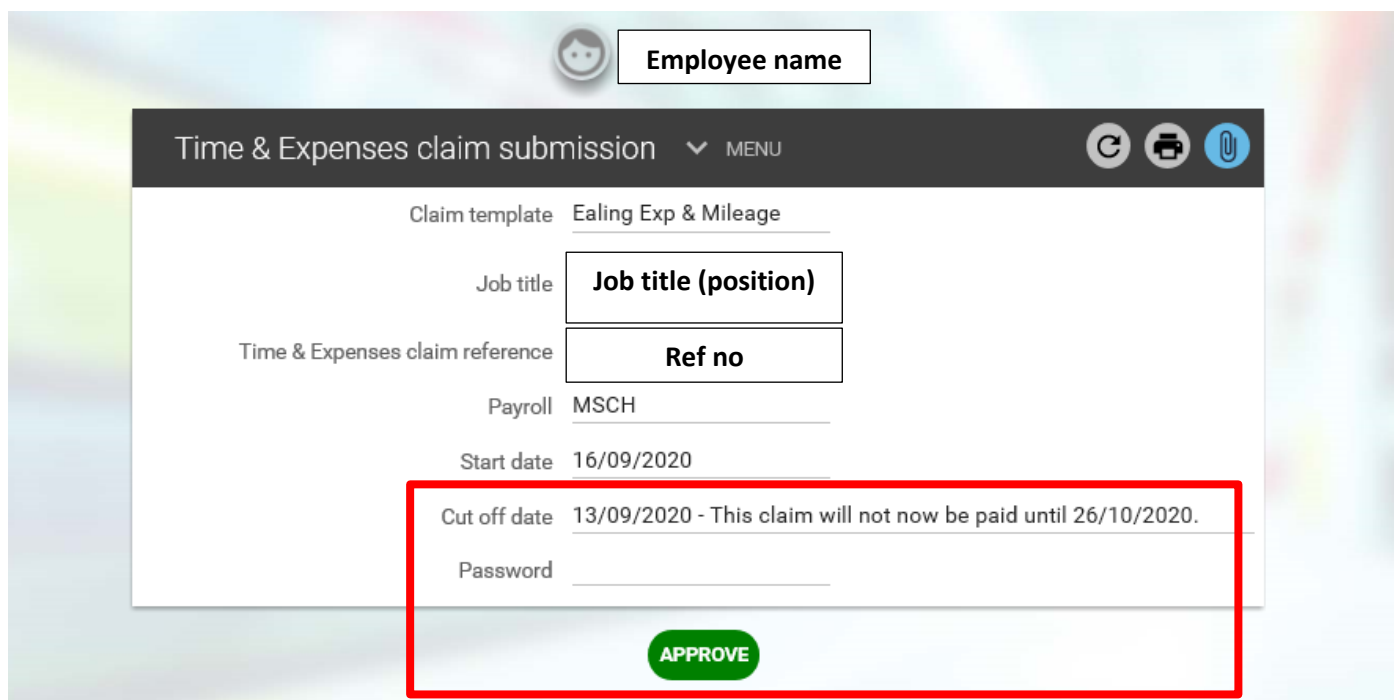
Please follow the final stage Time & Expenses claim submission to ensure the claim is submitted for payment

***Important* – please ensure you SUBMIT the claim**

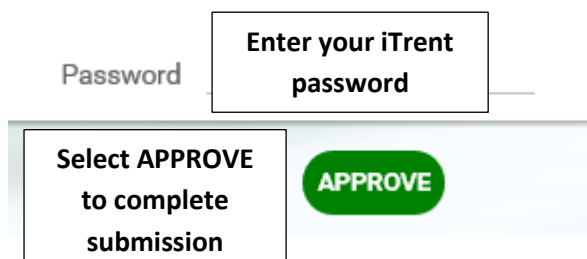
Select Time & Expenses claim submission



If receipts were not attached at the claim stage you can still attach them here prior to approval



- Cut off date – this will auto populate detailing the payment date



Once approved, the payment is held in temporary pay elements awaiting the next pay run