Payroll and Employee Services
Mileage and Expenses User Manual

Contents

1 Introduction

This document is a guide to using the **MyView Dashboard Mileage and Expenses Module**. This module enables employees to complete expenses claims online.

Employees are advised to refer to the **Travel and Expenses Guidance** that fully explains the principles and the basis on which mileage and expenses should be incurred and claimed.

1.1 What is MyView Dashboard?

MyView Dashboard is a web-based self-service system which supports the Council's objective of making processes more efficient and streamlined.

MyView dashboard is available 24/7 via the internet both internally and externally. MyView supports enhance navigation, usability and appearance that can be accessed using all smart devices. MyView can be accessed via desktop browsers such as Google Chrome and Microsoft Edge as well as Safari via iOS devices.

The dashboard supports the self-service functionality of the below:

- Customisable widgets that provide quick access to information
- View and update personal details including manager access to emergency contact details
- View, download and print payslips and P60 statements
- Update vehicle details e.g., Insurance end dates
- Update bank details
- Upload electronic documentation against HR record
- Submit mileage and expenses claims (as well as uploading receipts) including fully integrated experience with Google Maps as part of the process for claiming mileage
- Record, authorise and reject expense and leave submissions (for managers)
- View/submit/delete/approve annual leave and flexi leave requests
- Ability to view authorisation progress across all MyView Dashboard forms
- Access to HR/Payroll data via Reporting Services widgets (reports)
- Submit HR policy forms e.g., Code of Conduct, Vaccinations
- Submit contractual changes via My People Establishment Changes (for managers)
- Provide links to third party systems e.g., MyWorkforce, DLDS
- Undertake delegated MyView duties (submission/authorisation) on behalf of others

Documentation to support the use of MyView Dashboard / Frequently Asked Questions are available via www.durham.gov.uk/MyView

1.2 What is the MyView Dashboard Mileage and Expenses Module?

This module enables employees to complete mileage and expenses claims online.

Managers can authorise mileage and expenses claims. However, not every manager is able to authorise mileage and expenses claims. Only specific managers have been allocated the authorisation role.

If you feel that you should be able to authorise mileage and expenses claims, you should contact your line manager who will need to verify that you can authorise claims for those who report to you.

Your line manager should email MyView@durham.gov.uk to request that the expenses authorisation role be added to your post.

The Mileage and Expenses claim form has limits on expenditure types that will generate a warning message when trying to claim over the limit. **MyView will not automatically block a claim that is above the set amount. It is the manager's discretion as to whether to authorise/reject the claim.**

Managers are encouraged to take additional consideration of claims made outside of a **90-day period** of incurring the expenditure particularly if there a valid reason for the delay (e.g., long term sickness). An excessive workload is not an acceptable reason for failing to submit a claim within the desired timescale.

Claims should be submitted and authorised for payment on or before the 10th of the following month unless otherwise notified. Claims received after the deadline will be processed for payment in the following pay period. **No advance payments will be issued**.

All employees should submit their claims promptly, preferably during the month following the incurring of the expenditure. Employees are advised that mileage and expenses can be entered and saved daily (or entered and saved as time allows) but should be submitted for authorisation **monthly**.

Employees have the option to claim the following via MyView:

- Accommodation and Subsistence Expenses
- Business Mileage (using integrated Google Maps - see section 1.3)
- Business Mileage – Out of Hours
- Excess Travel/Disturbance Mileage
- Other Operational Expenses
- Removal, Lodging and Separation Expenses
- Travel Expenses (not car mileage)

1.3 MyView Google Maps

The Expenses maps functionality provides a fully integrated experience with Google Maps as part of the process for claiming Business Mileage incurred within normal office hours.

The integration of Google Maps into the Business Mileage claim form simplifies the user experience by speeding up the claims process. The use of the Google Maps integration provides benefits to the employee claiming mileage, the authoriser and to the Council in processing/paying accurate mileage claims.

Employees can quickly enter their journey route and are confident that the mileage generated is representative of the journey they made. The Council benefits from both the authoriser having a visual representation of the journey when authorising and the number of miles claimed is true representative of the journey made. The auto-calculation of mileage for journeys recorded will reduce the potential for over/under estimation of mileage incurred.

The Google Maps interface provides address suggestions as the employee starts to input the information and will also automatically capture the employees home and work locations, therefore home to office (work location) mileage can automatically be deducted from mileage claims where appropriate to do so.

The Google Maps interface is fully device responsive and will work on a range of devices (including PC/Mobile/Tablets). It is recommended to use the Google Chrome internet browser when using MyView through a windows device and Safari internet browser via macOS desktop devices. Mobile devices support use of Google Chrome via Android and Safari via iOS.

Where excess travel and/or out of hours business mileage is incurred, users are still encouraged to use Google Maps to calculate the correct number of miles that should be claimed.

The total number of miles claimed via Google Maps will be 'naturally' rounded. For example, 39.86 miles calculated by Google Maps will appear on the expenses claim form as 40 miles. Employees are unable to overwrite/change the calculated mileage.

1.4 Features available in the Mileage and Expenses Module

The MyView Dashboard Mileage and Expenses Module has five key features:

- Functionality of Google Maps to plan and create a journey as part of an expenses claim.

- Claimants should attach receipts to their expenses claim form. These receipts can be scanned and uploaded before being attached to the claim header (e.g., a VAT petrol receipt) or to each line of a claim (e.g., a car parking ticket). **Managers should ensure that appropriate receipts have been attached to the electronic claim form before authorisation.**

- You can view the authorisation progress of your claim form as well as being able to view details of previously authorised/rejected forms via MyView Form History (see section 4 Form History – View Authorisation Process). This includes audit details of who authorised/rejected your form and when this took place.

- Managers can partially authorise expenses claim forms rather than having to reject the whole claim if there is an issue with individual line(s).

- You can claim business mileage and excess travel separately using the different expenses groups available on the expenses claim form. **Managers should ensure that excess travel and business mileage claims have been recorded appropriately before authorisation.**

1.5 Further Information

If you would like any further advice or would like the document in an alternative format, please contact the MyView Team within Payroll and Employee Services using the below contact details:

- Email via: **MyView@durham.gov.uk**
- Telephone via **03000 269 919**

2 Changing / Updating Vehicle Details

The **Employee Vehicles** module enables employees to enter the details of vehicles against which they are claiming mileage. When an employee changes their car, the module enables the new vehicle details to be entered prior to making their expenses claim. Entering the vehicle details enables the registration number to be selected in the car mileage section of the expenses claim form.

Note: Payroll and Employee Services will set up your user class, so you are able to claim but responsibility on setting up (and maintaining) vehicle details rests with employee.

The module can be accessed via clicking on the **[Employee Vehicles]** link on the left-hand navigation panel.
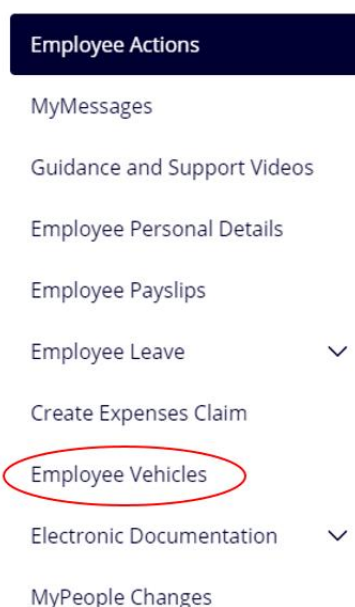
The module main page lists all vehicles set up against your employee record including current and historic entries. The information displayed includes the start and end dates, default vehicle flag, registration number and the vehicle description. You can view data on any listed vehicle by clicking the registration number link. Vehicle data in read-only mode is presented in a series of pages.

Note: Current vehicles are listed with [close] in the End Date column. **You should only close a vehicle if it is no longer used.**

If you do not provide updated insurance/vehicle details to cover the period of your next claim, MyView will not be updated therefore any claim being submitted (post-dating the insurance expiry) would therefore be against out-of-date vehicle details which would contradict the disclaimer. The new vehicle insurance details submitted would override the existing entry in the system.

It is the responsibility of the employee to provide a copy of their covering insurance documentation to their manager. It is the responsibility of the manager that upon notification of a vehicle/insurance details amendment that they check that the employee has valid insurance documentation which includes Business Use cover before authorising subsequent claims.

2.1 Adding a Vehicle

To add a new vehicle:

Click **[Add new vehicle]** to display the Add New Vehicle section.

Add Car Registration and click **[Next].**

If the vehicle already exists, you will be asked to enter details relating to another vehicle. On basis the vehicle already exists you would just edit the existing vehicle by selecting the Registration from the list of vehicles displayed that are already linked to your record.

If the vehicle does not already exist on the database, subsequent wizard pages contain fields which must be completed for the new vehicle holding.

Enter the vehicle holding registration details:

- **Effective Date**: Enter in the effective date of the vehicle i.e., when the vehicle needs to be used from (date can be selected via Calendar or typed in)
- **End Date**: Leave Blank when adding a new Vehicle
- **Vehicle Replacing**: If the new vehicle is replacing a previous vehicle, then select the vehicle you wish to be replaced from the drop-down menu
- **Is your previous vehicle still available to you?** If your previous vehicle is still available for you then tick the checkbox, otherwise leave blank
- **Is this your default vehicle?** Please tick the checkbox if the new vehicle is your primary vehicle.

Click **[Next]** for Vehicle Detail and complete the following fields:

- **First Registered**   *e.g. 30/09/2014 (Date can be selected via Calendar or typed in)*
- **Make**   *e.g. Volkswagen*
- **Model**   *e.g. Golf*
- **Ownership**   *e.g. Privately owned car*
- **Fuel Type**   *e.g. Diesel.*
- **Engine Size**   *e.g. 1999 If unknown refer to:* https://vehicleenquiry.service.gov.uk/
- **CO2 Value**   *Defaulted to 999 **(do not amend)***
- **Electric Range**   *To be completed if you have selected **Electric** as the **'Fuel Type'***

Click **[Next]** and complete the following P11D Detail fields:

- **Vehicle Type**   *e.g., Car*
- **Transmission**   *e.g., Manual*
- **List Price**   *Defaulted to 0 **(do not amend)***
- **Accessories Value (New)**   *Defaulted to 0 **(do not amend)***
- **Accessories Value (After New)** *Defaulted to 0 **(do not amend)***

Click **[Next]** and complete the following Ownership fields:

- **Road Fund Band** - Select 'Not Applicable' option
- **Road Fund Due** - Leave blank
- **Insurance Due Date** - Enter the **insurance renewal date** for the vehicle (date can be selected via date calendar or be typed in)
- **Mot Due Date** - Enter the **MOT renewal date** for the vehicle if applicable (date can be selected via date calendar or be typed in)

Click **[Submit]** to submit the vehicle details. The new vehicle will now be displayed on the module main page.

2.2 Closing a Vehicle

Vehicles listed with **[close]** in the End Date column on the module main page can be assigned an availability end date. Click **[close]** to run the Close Vehicle Holding wizard. The wizard consists of one screen, containing a mandatory **[Closing Date]** field. Enter the end date for the vehicle and click **[Submit].**

The change is displayed on the module main page with an end date entered against the selected vehicle.

In the event of entering a closing date against the wrong vehicle please contact the MyView helpdesk via email to MyView@durham.gov.uk quoting your employee number and the corresponding vehicle registration details that require amendment.

2.3 Updating Vehicle Insurance Expiry Date

Managers and employees will receive an email from MyView Alert to notify that the employee's insurance cover is due to expire. These notifications will be sent 30 days, 14 days, and 2 days before the insurance expiry date.

If you do not update MyView (via the Employee Vehicles Module) to show that the vehicle is no longer used or that you have renewed your vehicle insurance, you will continue to receive these notifications.

To update the vehicle insurance expiry date of a current vehicle, click on the **[Registration]** of the vehicle you want to update.

Vehicles

Start Date	End Date	Default	Registration	Description
01/08/2021	01/08/2022	Y	ABCD123	AUDI A1 0.0 Petrol

Click **[Next]** until you reach the Ownership details screen which holds the **[Insurance Due Date]** field where you can input the revised insurance expiry date. Click **[Submit].**

Road Fund Band   Petrol CO2 up to 150

Road Fund Due Date

Insurance Due Date   01/06/2022

MOT Due Date

Cancel   << Prev   Next>>   Submit

2.4 Transferring a Registration Plate

If you have a new vehicle but have transferred the registration plate from another vehicle that is already set up in MyView, you should email MyView@durham.gov.uk with details of the new vehicle so that this can be updated. **You will be unable to set up the new vehicle if the registration plate is registered against another vehicle that is already set up in MyView.** Please do not record the vehicle registration with slight amendments to avoid this procedure.

- **Private Car *Reg***   *e.g. ABC 123*
- **First Registered**   *e.g. 30/09/2015*
- **Make**   *e.g. Volkswagen*
- **Model**   *e.g. Golf*
- **Fuel Type**   *e.g. Diesel*
- **Engine Size**   *e.g. 1999 If unknown refer to: https://vehicleenquiry.service.gov.uk/*
- **Vehicle Type**   *e.g., Car*
- **Transmission**   *e.g., Manual*
- **Ownership**   *e.g., Privately owned car*
- **Insurance Renewal**   *e.g., 20/02/2017*

3 Making a Mileage and Expenses Claim

To start an expense claim, click on the **[Create Expenses Claim]** link from the left-hand navigation panel.

Employee Actions

MyMessages

Guidance and Support Videos

Employee Personal Details

Employee Payslips

Employee Leave   ⌄

Create Expenses Claim

Enter the initial information for the claim header, selecting your relevant post from the drop-down list and entering a description and claim reason. **Employees with multiple posts are reminded to select the correct post when creating a new claim.**

Create Expense Claim

New Claim

Enter your claim form information here

Position	Description
Payroll and Employee Services Officer ⌄	

Done ✓

You should state the month and year of claim (e.g., July 2021 Business Mileage) in the **[Description]**.

You are encouraged to submit claims on a **monthly** basis. To this end, using a standardised naming convention across your claim forms will help you keep track of what you have claimed and make it easy to follow your claim history in Form History.

Click **[Done]** to close the header and continue to the rest of the form. You can re-open the header to adjust the contents by clicking the **[Form Info]** button in the top left of the claim form.

The new claim form is then presented. It is important that before submitting any claims that employees are aware that the claim is submitted in accordance with the onscreen submission disclaimer.

Add one or more lines of expenses to the claim form by clicking on the **[Add Line]** button.

July 2021 Business Mileage Claim PES Team Leader   ✎ Form Info

Add Line +

10

For each line, you can record the Date of Claim and select the type of expense via the **[Group]** dropdown. Depending on the expenses group selected, you will be able to select the expenses **[Type]** and record a suitable description.

The expenses claim form has seven different expenses groups to submit the appropriate line of expenses:

Employees have the option to claim the following via MyView:

- Accommodation and Subsistence Expenses
- Business Mileage (using integrated Google Maps see section 1.3)
- Business Mileage – Out of Hours
- Excess Travel/Disturbance Mileage*
- Other Operational Expenses
- Removal, Lodging and Separation Expenses
- Travel Expenses (not car mileage)

Click on **[Add Claim Attachments]** to upload a receipt against the claim header. These receipts can be scanned and uploaded before being attached (e.g., a VAT petrol receipt). **Managers should ensure that appropriate receipts have been attached to the electronic claim form before authorisation.** Attachment file name length for receipts cannot exceed 32 characters.

3.1 Making a Claim – Business Mileage

The mileage and expenses claim form supports interaction with, and generation of, Google Maps routing. An employee creating new mileage claims is presented with an interface where they can enter journey details with multiple way points (additional steps in the journey). The claimant is then presented with a Google Maps route of the journey, with associated mileage.

After creating the claim from (refer to start of section 3), select the 'Business Mileage' option from the **[Group]** dropdown list.

Record a suitable claim line description in the **[Description]** field (e.g., Green Lane to Southfield Lodge to Green Lane) ensuring that you provide sufficient detail about the claim, such as times and destinations so that your manager can validate the claim.

Select **[Create Journey]** to record journey details for the mileage claim using the Google Maps interface.

The journey screen will already hold details of your home address and work location using information held against your HR record.

Please note:

- If your **Home** address is **incorrect**, this should be updated via MyView. To update your address, exit the mileage claim and go to **Employee Personal Details** on your MyView menu.

- If your **Work** address is **incorrect**, or **missing**, your manager will need to submit a MyWorkforce Request to update your post holding location.

When submitting a mileage claim, please ensure you check these details for accuracy - if you still believe these are inaccurate please contact myview@durham.gov.uk so that your home and work location addresses can be validated to ensure it calculating the correct number of private (home to office/work location) miles.

Note: data has been omitted from the below screen shot for data protection purposes.

If you are searching for a location and it is missing/incorrect or duplicated within Google Maps, or if there are multiple similar locations appearing in your search results, please email MyView@durham.gov.uk with the details of the missing location/address so that we can make the request to update the map where required. However, this request may take up to **14 calendar days** for Google to evaluate. The MyView team will endeavour to let you know when the map has been updated.

If your home or work address is not being identified, then the system will be unable to calculate Home to Office (work location) mileage which is needed to populate private miles on the claim line.

If your **home** or **work** location address is not being identified, then this means that it cannot be located on the Google Map. In this instance, the MyView Team may need to send a request to Google to update the map where required.

Please email MyView@durham.gov.uk with the details of the missing location/address so that we can make the request to update the map where required. However, this request may take up to **14 calendar days** for Google to evaluate. The MyView team will let you know when the map has been updated.

You should record all steps of your journey using the location fields available. The Google Maps interface provides address suggestions as you type. It is recommended that you use postcodes (where known) when searching for locations.

You can continue to add additional locations to the journey if required by selecting **[+ Add New Step]** (maximum of 27 steps permitted per claim line).
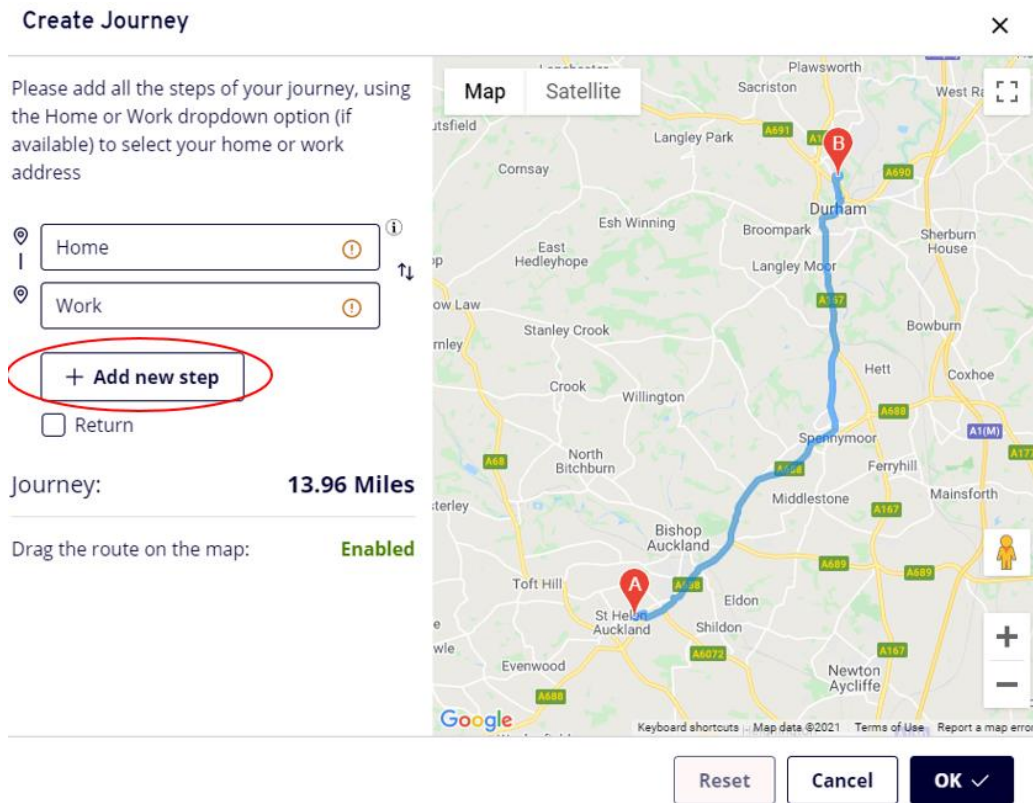
If three or more addresses are entered, the Swap Steps button (shown below) is no longer available. However, you can still drag and drop the addresses to reorder the journey.

Journey steps can also be removed by selecting the **X** icon:

Note: the drag and drop are not available on mobile devices.

Previously entered addresses can be deleted by clicking the delete icon button in each address line. If reordering of the journey is required on a mobile device, we recommend that you delete the addresses that are in the wrong order and then re-enter the address details in the correct order.

Once your journey details have been recorded, click **[OK].**

The **[Journey]** field will automatically record the total mileage to be claimed in the **[Mileage]** field.

The mileage to be claimed is the Actual Mileage minus the Private Miles indicated in the **[Mileage]** field. Any business mileage submitted **must** have **[Calculate Private Miles]** ticked (the system will automatically have this boxed ticked upon entering the journey).

Select the **[Taxable]** check box if the claim line should be identified as taxable.

Private Miles calculates any 'home to office (work location)' mileage incurred. During a normal contracted day of work an employee is unable to claim, "home to office (work location)" mileage as this is deemed as "ordinary commuting". For example, when an employee travels from home directly to a meeting away from the HQ/Base, the scheme only allows the additional mileage travelled to be claimed. If the journey from home to normal workplace is 5 miles, but the journey from home to the meeting is 8 miles, the employee would only be able to claim payment of 3 miles.

Please refer to the below example.

Example A:

Employees HOME is Bishop Auckland, and WORK location is County Hall (14 miles)

The claim will auto-deduct the miles between the employees' HOME and WORK location.

Note: The total number of miles claimed will be 'naturally' rounded. For example, 39.86 miles calculated by Google Maps will appear on the expenses claim form as 40 miles. Employees are unable to overwrite/change the calculated mileage.

3.2 Edit Business Mileage Journey Calculated via Google Maps

After the Google Maps journey has been created, the **[Edit Journey]** button is displayed, and the remaining entry fields for the claim form are displayed. The mileage values are display-only.

You can return to the Google map and edit the journey further by selecting the **[Edit Journey]** button.

3.3 Using Return Journey Flag in Google Maps

You can flag a return by ticking the Return flag in the journey screen. This will automatically double the miles on the claim form.
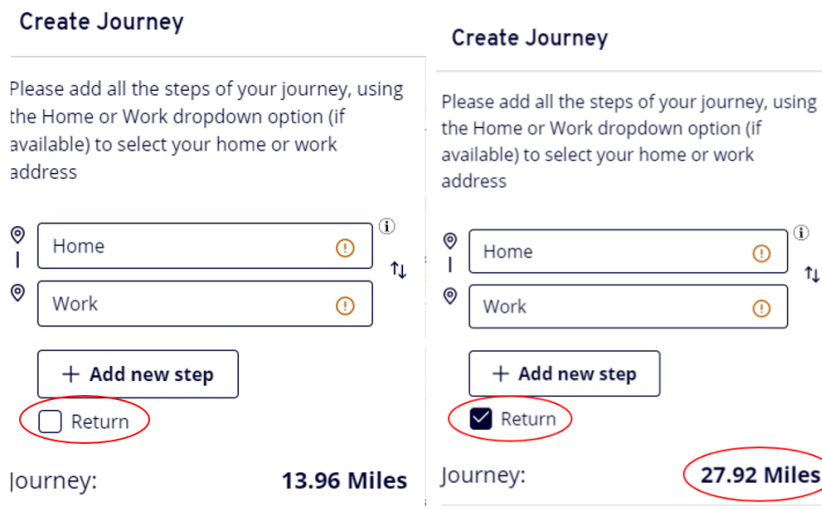
3.4 Route Modification via Google Maps

You can "drag" the route generated by Google Maps, allowing you to interact with the map and amend the route if necessary. You will need to provide justification for the route change, such as reporting a road closure.

This option will be particularly helpful if you were unable to take the google recommended route (quickest, most direct route) due to roadworks or other unavoidable reasons. In such cases, you can select the route on the map itself and re-route the journey. Simply select the blue line on the map and drag the route accordingly. You can zoom into the map if required using the + / - icons.

When a journey has been adjusted, you are required to provide a reason for the modification. You will be unable to proceed with the journey until the reason field has been populated.
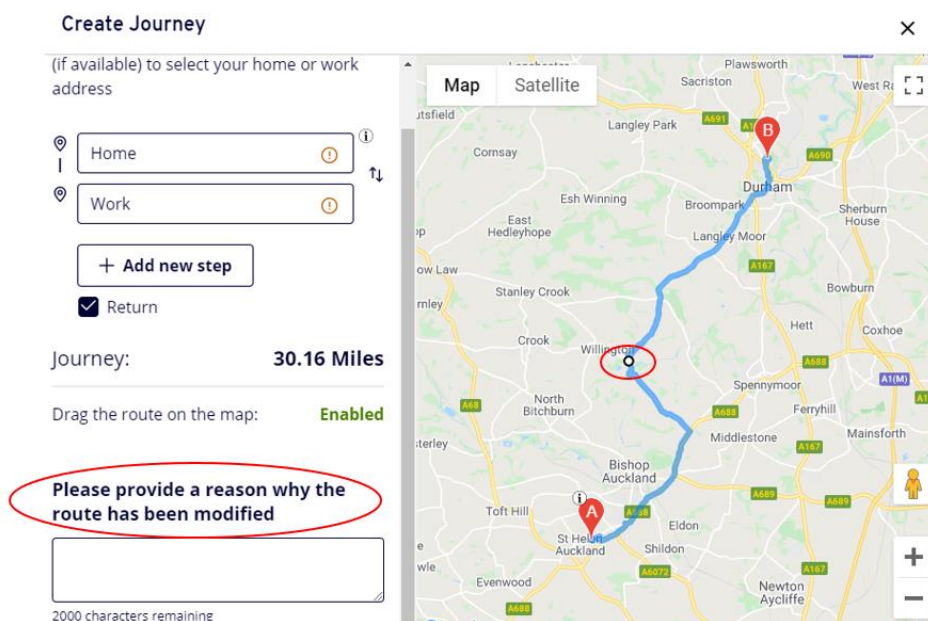
Click the **[OK]** button to return to the main claim form. Any miles calculated in the Google Maps window automatically populate the claim form.

Please note: Google Maps interface is fully device responsive. However, it is not possible to drag and drop any address entries to re-order the steps of the journey on mobile devices. Google Maps does not support the drag route option on mobile devices; therefore, the route drag functionality is also disabled.

3.5 Making a claim – Business Mileage – Out of Hours

During a normal contracted day of work an employee is unable to claim Home to Office (work location) mileage as this is deemed as ordinary commuting. However, all business mileage can be claimed and are not subject to tax.

However, outside of normal office hours, "home to office" mileage can be claimed, **but in line with HMRC regulations it is subject to tax and National Insurance contributions.** HMRC regulations state that no tax relief is available for any of this expenditure because all journeys between home and permanent workplace are classed as "ordinary commuting".

In the scenario where the employee is travelling straight from Home to Meeting Location outside of normal office of hours (and the meeting location from the employees Home is further than the employees' normal home to office mileage), the employee would:

- claim the Home to Office (work location) business mileage as taxable mileage; and
- claim the Office to Meeting Location mileage as non-taxable business mileage.

The standard **'Business Mileage'** claim group is ordinarily set up to ensure that all claims for a single day are recorded on the same claim line. This is to ensure that private miles are correctly deducted in ordinary circumstances when claiming business mileage incurred during normal office hours.

This therefore means that where an employee needs to claim Home to Office (work location) mileage as taxable and the Office to Meeting Location mileage as non-taxable these will need to be claimed by selecting the '**Business Mileage – Out of Hours**' claim group rather than the 'Business Mileage' claim group so that two claims for the same date can be submitted on the same claim form.

Where the employees' home to meeting location outside of office hours is fewer miles than the employees' normal home to office mileage the employee should claim all mileage as taxable.

After creating the claim from (refer to start of section 3), select the '**Business Mileage – Out of Hours**' option from the **[Group]** dropdown list.

You will then be presented with the below fields to input the mileage manually (without integration of Google Maps).

You will need to record a suitable claim line description in the **[Description]** field (e.g., Green Lane to Southfield Lodge to Green Lane) ensuring that you provide sufficient detail about the claim, such as times and destinations so that your manager can validate the claim.

You will need to record the **[Actual Mileage]** and any **[Private Miles]** incurred as part of the journey. The mileage to be claimed is the **[Actual Mileage]** minus the **[Private Miles]** - indicated in the **[Mileage]** field.

Select the **[Taxable]** check box if the claim line should be identified as taxable (when appropriate).

- When claiming for private mileage (Home to Office) incurred outside of normal hours the taxable box **must** be ticked. The number of miles to be claimed should be recorded in the **[Actual mileage]** field whilst the **[Private Miles]** field should be left blank so that the full balance of private miles can be claimed as (taxable) mileage.

- Claiming the Office to Meeting Location mileage as non-taxable (using the above scenario) will be the same process, however the taxable flagged should not be selected.

The **'Business Mileage – Out of Hours'** claim group will allow you to add a duplicate line for the same date to claim both taxable and non-taxable miles out of hours.

3.6 Adding a VAT Receipt to a Mileage Claim Line

Where mileage allowance is claimed a VAT receipt must be retained that covers the cost of the fuel prior to the journey being undertaken for the purposes of HMRC and audit inspection. The **[VAT Receipt]** box should be ticked if you have attached a supporting VAT fuel receipt. If VAT receipts are not attached to the claim header or an individual claim line, the claim line should only be authorised and therefore paid on the basis that you will be able to provide them if requested to do so. Please note: VAT receipts are not required for electric vehicles.
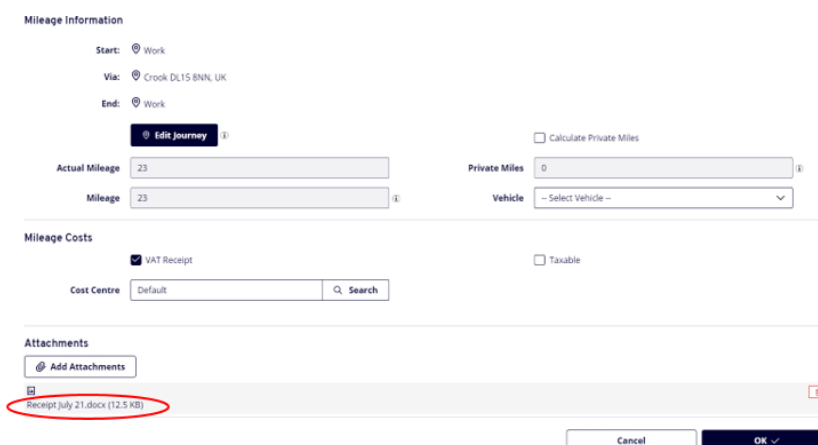
Click on **[Add Attachments]** to upload a receipt against the claim line. These receipts can be scanned and uploaded before being attached (e.g., a car parking ticket). **All receipts should now be attached to the claim form. Managers should ensure that appropriate receipts have been attached to the electronic claim form before authorisation.** Attachment file name length for receipts cannot exceed 32 characters.

3.7 Adding a Cost Centre to a Mileage Claim Line

Click **[Search]** if you need to use an alternative cost centre to your default post cost centre. You will be presented with a list of approved alternative cost centres. Select the appropriate cost centre from the available list. Upon selecting the alternative cost centre, you will see that the override cost centre code has been recorded on your claim.

If the required override cost centre is not listed, you will need to undertake the following tasks:

- Request required cost centre code via contacting your Service Accountant (Corporate Finance and Commercial Services).
- The Service Accountant will inform you of the appropriate cost centre as well as informing the ResourceLink Systems Administration Team so that MyView can be updated.
- Once MyView has been updated, this will then enable you to submit a claim against the appropriate alternative cost centre.
- You should then submit your claim selecting the appropriate alternative cost centre.

If using an override cost centre, the claim should be submitted separately to your standard monthly mileage claims. The override **[Cost Centre]** field is not to be used for recharging mileage claims against a previous post. All mileage claims should be submitted for payment before commencement

of a new post. For temporary changes to costing, such as working in a different area, arrangements for re-costing of mileage payments should be made via your Service Accountant.

3.8 Making a Claim – Excess Travel

An employee who is relocated and incurs additional travel cost resulting from excess travel is entitled to be paid an amount equal to the difference between the distance of travelling:
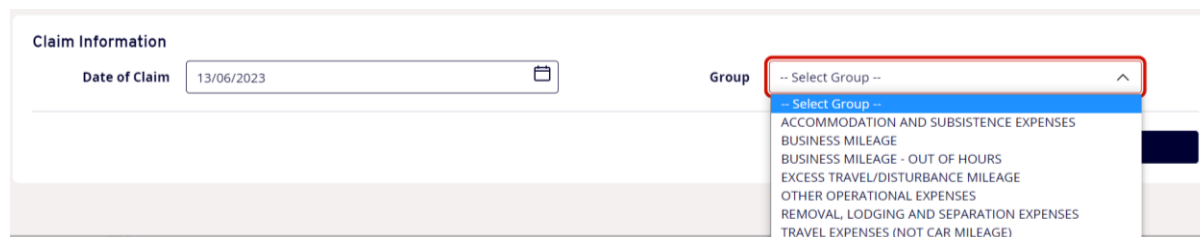
- From **home** to **new place of work**; and
- From **home** to **old place of work**.

The excess mileage can be claimed via MyView but in line with HMRC regulations it is subject to tax and National Insurance contributions.

Claimants are reminded that excess travel claims should be submitted separately to standard business mileage claims which should also be clearly marked with the appropriate description (e.g., Excess Travel July 2021 Mileage).

Managers should ensure that excess travel and business mileage claims have been recorded appropriately before authorisation and that an excess travel claim agreement form has been completed and sent to Payroll and Employee Services that covers the period of the excess travel claim – failure to do so may delay payment of the claim.

After creating the claim form (refer to start of section 3), select the '**Excess Travel/Disturbance Mileage**' option from the **[Group]** dropdown list.

You will then be presented with the below fields to input the mileage manually (without integration of Google Maps).

Record a suitable claim line description in the **[Description]** field (e.g., old work to new work). It is important that the journey description details the full excess travel journey details (to the new work base) whilst also indicating the previous journey (to the old work base). The number of miles to be claimed should be recorded in the **[Actual mileage]** field whilst the **[Private Miles]** field should be left blank so that the full balance of private miles can be claimed as (taxable) mileage.

You must ensure that you select the **[Taxable]** check box so that the claim line is identified as taxable.

3.9 Making a Claim – Expenses

After creating the claim from (refer to start of section 3), select one of the expenses groups from the **[Group]** dropdown list.

Select expenses **[Type]** before recording the following information against the claim line.

- **Description** (please also ensure that you provide sufficient detail about the claim such as times and destinations in order that your manager can validate the claim.)
- **Value**
- **Divisor** e.g., 3 bus fares of £4.80 could be entered once provided that 3 receipts are provided with the summary claim form once it has been submitted. The claim value in this example would £14.40.
- **Receipt** (this should be an appropriate reference that is also indicated on the hard copy receipt attached to the summary form).

The Mileage and Expenses claim form has limits on expenditure types that will generate a warning message when trying to claim over the limit. **MyView will not automatically block a claim that is above the set amount. It is the managers discretion as to whether to authorise / reject the claim.**

3.10 Editing / Copying / Deleting Claim Lines

The claim form summary has options that allow you to:

- Edit an existing claim
- Copy an existing claim line
- Delete an existing claim line

3.11 Submitting a Mileage and Expenses claim

If you have completed all lines of your claim, click **[Submit]** to send the form for authorisation. Click **[Yes].**

You will be provided with an on-screen notification to say that the claim has been submitted for authorisation:

'*Your claim has been submitted for authorisation. Please refer to the 'Form History' module to view the authorisation progress of your claim'.*'

If your submitted claim is not authorised/rejected within 7 calendar days, the claim is automatically rejected and will therefore need to be re-opened and re-submitted for authorisation.

3.12 Claims 'In Progress'

Should you wish to submit your claim at a later date, click **[Save]** to leave the claim form open so that it can be amended further before submission.

Your MyView dashboard displays a widget for 'In Progress' Forms.

Click on 'Expense Claims' to show a list of 'open' forms. Click on the link below to re-open a claim form. Clicking on the information button will bring up a summary of the claim.
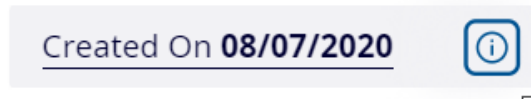
Once the claim form has been opened, you can then choose to add/edit the claim form or to **[Submit]**, **[Save]** or **[Delete]** the claim form.

If you choose to delete the claim form, you will be provided with an on-screen confirmation message asking you to confirm.

4 Form History – View Authorisation Progress

You can view the authorisation progress of your request as well as being able to view details of previously authorised/rejected forms. This includes audit details of who authorised/rejected your form and when this took place.

Click on the **[Form History]** link on the left-hand navigation panel.

Form History will display all forms previously submitted, filters will need to be selected initially to view certain forms or applying all filters to view all forms:

Select **Event Filter** to apply a filter to all form titles or only selected choice:

Select **Status Filter** to apply a filter to all forms or only selected choice:
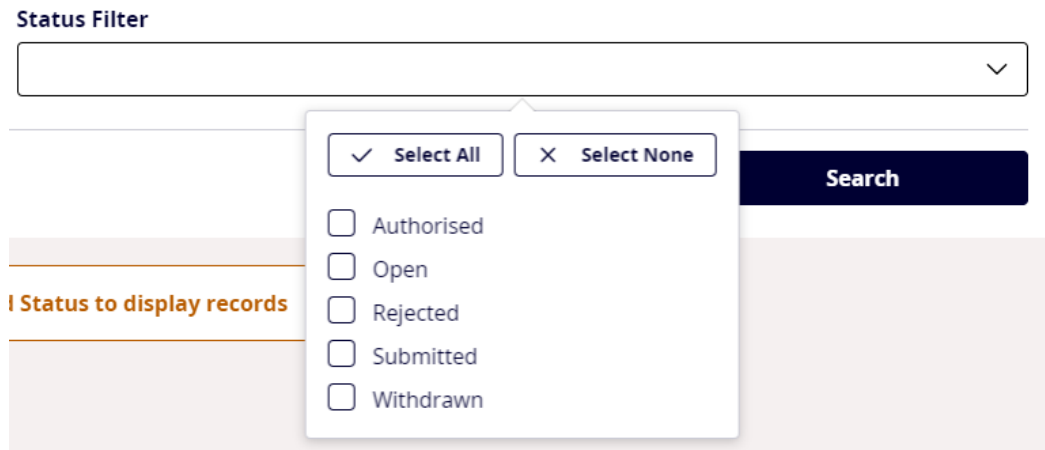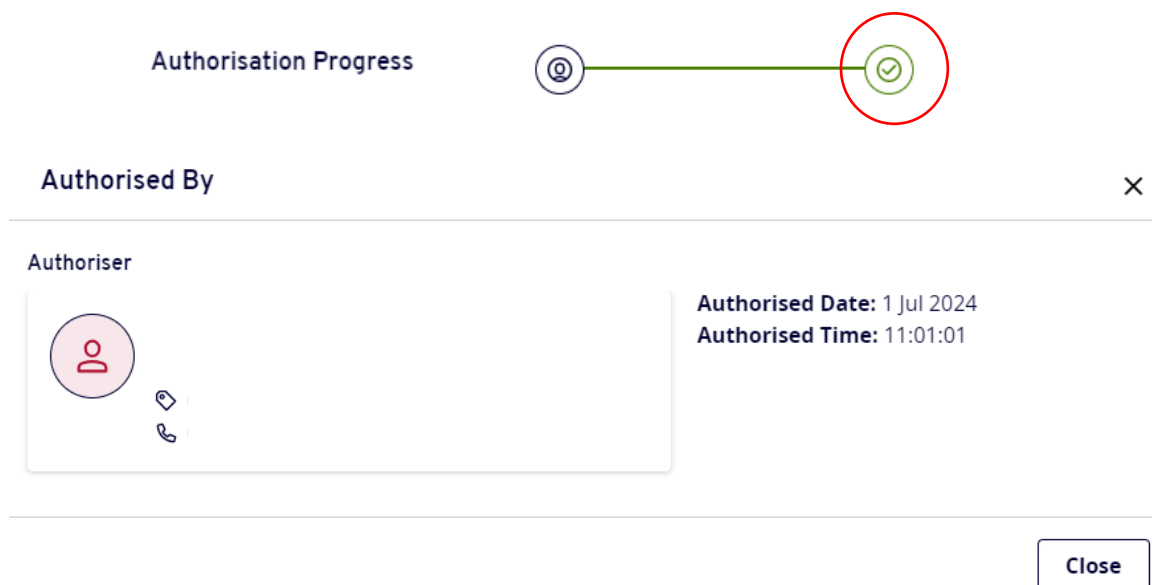
Status Filter

Once filters have been selected, please select the **Search** button, depending on the filter applied all forms will appear displaying the relevant status (Authorised / Submitted / Rejected / Withdrawn).

Click on the form name under **[Description]** to open the relevant form.

The form includes a section called **[Authorisation Progress].** Click on the green/orange icon to view authorisation status details. An authorised form will show a green tick whilst a submitted form will show an orange icon.

Once authorised, the status will change to authorised. If you wish to know the exact date and time of the authorisation, please expand the line by selecting the down facing arrow to the right. By selecting the green tick a box will appear to display the date and time of authorisation:

4.1 Withdrawing a Submitted Claim

Click on the **[Form History]** link on the left-hand navigation panel

Apply filter to **[Status]** selecting 'Submitted'.

Click on the form name under **[Description]** to open the relevant form

Click **[Withdraw]** to change the status of the form from 'Submitted' to 'Open'.

4.2 Partial Authorisation

Managers can partially authorise an expense claim form rather than having to reject the whole claim if there is an issue with individual line(s). Managers should refer to the MyView Dashboard MyPeople User Guide for guidance on authorising mileage and expenses claims.

Click on the **[Form History]** link on the left-hand navigation panel.

A claim form that has been partially authorised will have a form status of 'Mixed'.

Apply filter to **[Status]** selecting 'Mixed'.

Click on the form name under **[Description]** to open the relevant form

The original claim form will now be shown in two sections – rejected and authorised. Under the 'rejected' section select **[Reopen].**

You then have the option to edit the claim line(s) before resubmission. Click **[Submit]** to submit the claim line for authorisation.

Once resubmitted click on **[Form History]** from the left-hand navigation panel. The form status will still be shown as '**Mixed**'.

Click on the form name under **[Description]** to open the relevant form. The claim status of the resubmitted claim lines will have changed to **'Submitted'**.

5 Delegated Input of Mileage Claims

The ability to submit on behalf of another person is pre-determined within ResourceLink. Individual posts will have delegated responsibility to input claims on MyView on behalf of another employee. If you have any queries on delegated duties, please email MyView@durham.gov.uk.

If you have been set up to submit claims on behalf of another employee, click on the **[Delegated Duties]** link on the left-hand navigation panel.

Electronic Documentation   ⌄

MyPeople Changes

Delegated Duties

Form History

Employee Appraisals

Employee Training

Under **[Responsibilities]** you will see a list of the delegations available to you. Please select the appropriate responsibility.

Responsibilities

Description	Module
test :	Document View:Attendance Management Administration Leave Management

Select the appropriate employee from the delegation rule (you may have delegated access for more than one employee within the same delegation rule) by clicking on the relevant employee's name.

It is important to highlight that once you have selected the appropriate person from the list, there is no further reference to the person you have just selected.

Click **[Create New Claim].** You will then follow the same instructions as if you were submitting your own claim.

5.1 Delegating Responsibility to Authorise Claims

Managers should refer to the MyView Dashboard MyPeople User Guide.