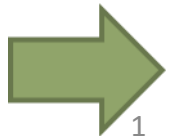




YOU ONLY NEED YOUR MOUSE FOR THIS TUTORIAL,  
YOUR KEYBOARD IS NOT REQUIRED.



SELECT THE ARROWS  
TO PROGRESS  
THROUGH SLIDES



# MYVIEW GUIDANCE NOTES FOR CAR MILEAGE AND EXPENSES

INDEX




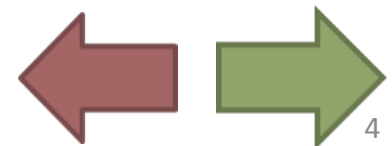
- These guidance notes will provide details on how to submit a Mileage and/or Expenses claim form through MyView.
- New claim – Mileage
- Before submitting claims, please check that your vehicle has been approved by your line manager. If your vehicle is not detailed on MyView, please refer to the guidance notes on registering your vehicle.
- **Please note** that **both** mileage and expenses claims can be submitted on the same form, they just need to be created on different lines.
- Once logged into MyView (Refer to the guidance notes which are available via the link on the main website page for login on instructions)



# INDEX

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- 6 – [Entering further details for the claim](#)
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N.B  
THE INDEX WILL BE  
ACCESSIBLE THROUGH ANY  
SLIDE, LOOK FOR THE  
 ICON AND CLICK  
TO RETURN TO THIS  
SCREEN.



Dashboard



View My Training/Absence

My Personal Details



Car Mileage and Expenses



Create New Expenses Claim

Form History

Mansfield DC Expenses Policy


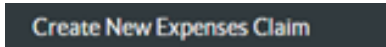
Ashfield DC Expenses Policy

Guidance Notes - Mileage/Exp

My Vehicles

Guidance on Adding a Vehicle

## How to access "Create a new expenses claim"

Click the  button from the left hand side of the screen.  
Then click 

**INDEX**



## Entering Details for the claim

ERICA  
H.R. Team Assistant -  
Recruitment

Dashboard > Create New Expenses Claim

### Create Expense Claim

#### New Claim

Enter your claim form information here

**Position**  
H.R. Team Assistant - Recruitment

**Description**

**Reason for Claim**

2000 characters remaining

Done ✓

Enter your details into the fields as above.

- Position – Make sure your job role is in the “position” box.
- Description – Enter the period of the claim for example “January 2017”
- Reason for Claim – Enter a general title such as “March claim for district Mileage”

For more details, click the ? icon at the top right hand corner.



## Entering further details for the claim

- Dashboard
- View My Training/Absence
- My Personal Details
- Car Mileage and Expenses
- Create New Expenses Claim
- Form History
- Mansfield DC Expenses Policy
- Ashfield DC Expenses Policy
- Guidance Notes - Mileage/Exp
- My Vehicles
- Guidance on Adding a Vehicle

### New Claim

Enter your claim form information here

Position

H.R. Team Assistant - Recruitment

Description

March 2017 Mileage and Expenses Claim

Reason for Claim

March claim for District Meetings

1967 characters remaining

Done ✓

When you have added in all of the relevant detail, please check your details and then click  .



## Mileage or Expenses?

March 2017 Mileage and Expenses Claim H.R. Team Assistant - Recruitment

Form Info ?

Claim Information

Date Select Date

Group -- Select --

Add Line +

Select the **Add Line +** icon to enter the date of the claim and the type of claim.



March 2017 Mileage and Expenses Claim H.R. Team Assistant - Recruitment

Form Info ?

Claim Information

Date Select Date

Group -- Select Group --

Cancel OK ✓

Click Select group, and you'll see that you can either choose car mileage or expenses.

***Select which tutorial you want  
to view first***

**MILEAGE**

OR

**EXPENSES**

**INDEX**






# CAR MILEAGE TUTORIAL


## Create Expense Claim

March 2017 Mileage and Expenses Claim H.R. Team Assistant - Recruitment Form Info ? ↺ ↻

---

**Claim Information**

**Date** 01/03/2017 


**Group** Car Mileage 

**Description** MDC to ADC and return - Attending meeting with finance  
1946 characters remaining

---

**Mileage Information**

**Mileage** 12

**Vehicle** HA110WE 

**Passengers**

---

**Mileage Costs**

☒ VAT Receipt

Cancel OK ✓



Enter in the mileage you did on your travels. Then if you have more than one vehicle, select the vehicle you made the travel in and then add in the number of passengers (not including yourself). If you were the only one in the car, leave the field blank (as above).

The VAT receipt must be provided and attached to the final summary sheet. Please tick the ☒ VAT Receipt Icon to confirm provision. Failure to provide may result in late payment of claim. When you have entered in the relevant details, click OK ✓.

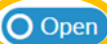







## Submitting the Mileage claim

Claim Information

Date: 01/03/2017  Group: -- Select Group -- 

Cancel OK ✓


 Total Lines: 1 Total Miles: 12 

Cost Centre:	Date	Group	Type	Value	
Default Cost Centre	01/03/2017	Car Mileage		12	   


Attachments:


Your Expense Claim


Total Lines: 1  
Total Miles: 12

Submit ✓  
Save 

Clear

Check through the details to confirm they are correct. To edit the claim, click the  icon and it will take you back to the previous screen.

You will notice that the status still shows as  as you are still making the claim.

If you are unhappy with the claim, click the  icon to delete the claim.

And to make another claim with the claim you have just made, click

Add Line +



## Submitting a Mileage claim Part 2

Claim Information

Date: 09/03/2017









Add Line +

Cancel

Submit ✓

Open Total Lines: 2 Total Miles: 24

Cost Centre: Default Cost Centre


Date	Group	Type	Value	
09/03/2017	Car Mileage		12	   
01/03/2017	Car Mileage		12	   

Attachments:

Your Expense Claim

Total Lines 2  
Total Miles 24


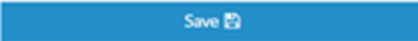
Submit ✓

Save 

Clear

This is what it looks like if you create a second claim, it will list them and you will also see a total of miles claimed.

When checked, click .

If you want to build up all of your claims, click  and then this claim will go to your form history for you to add claims on in the future. Click the  button for more information.



# Printing off your mileage claim

**i** Please print this summary, attach receipts (ensuring that your Line Manager has checked these for verification), and forward the summary to Payroll at:

Payroll  
C/O Human Resources  
Mansfield District Council  
Civic Centre  
Chesterfield Road South  
Mansfield  
Notts  
NG19 7BH

## March 2017 Mileage and Expenses Claim H.R. Team Assistant - Recruitment

[Form Info](#) [Help](#) [Print](#)

**Submitted** Total Lines: 2 Total Miles: 24

Cost Centre:	Date	Group	Type	Value	
Default Cost Centre	09/03/2017	Car Mileage		12	▼
	01/03/2017	Car Mileage		12	▼

### Your Expense Claim

Total Lines 2  
Total Miles 24

Withdraw

[Print Summary](#)

Your status will then say **Submitted** and this will be sent to your manager.

If you need to make a quick change or submitted it by accident, click 

Withdraw

.

Make sure you click [Print Summary](#) so you can attach the receipt and send/give that to your manager too.

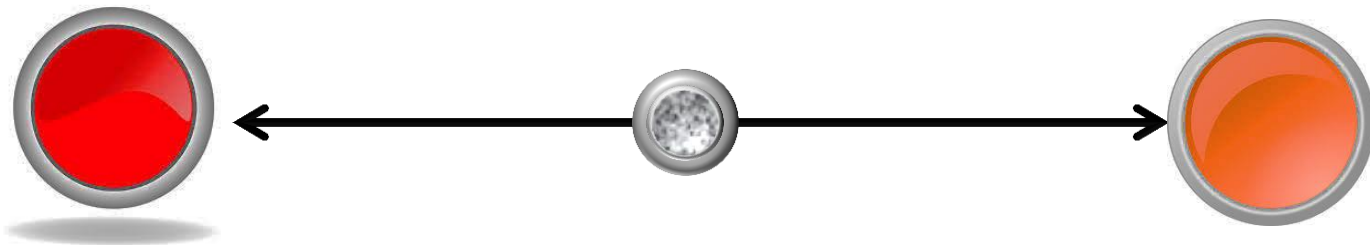
And that is the claim then created.




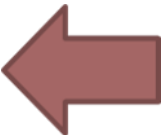
CLICK BUTTON TO  
SELECT OPTION

**Creating expenses claims**

**Creating Mileage Claims**



To exit the slideshow, click the  icon at the top left corner of your screen.



3/03/2017

APP\_TITLE

Please print this summary, attach receipts (ensuring that your Line Manager has checked these for verification), and forward the summary to Payroll at:

Payroll  
C/O Human Resources  
Mansfield District Council  
Civic Centre  
Chesterfield Road South  
Mansfield  
Notts  
NG19 7BH

Employee Number: 012345  
Employee Name: ERICA NERNIE  
Claim Number: 0000000788  
Claim Date: 30/03/2017

All figures in this claim are in Sterling

Claims against Default Cost Centre

Mileage Summary

Date: 17/03/2017

Description: Ashfield and back

15

Date: 17/03/2017

Description:

4

Total Mileage:

19

19

Total Mileage for claim:

Total Mileage for claim:

Total Mileage:

Description:

Date: 17/03/2017

Description: Ashfield and back

Date: 17/03/2017

Description:

INDEX

## Preview of your claim as a hard copy

This is what the print out should look like, attach this to your receipt and hand over to your manager for authorisation.

Your expenses print out will look very similar but it will show the total costs.



Click to return

## This is what the screen will look like

### New Claim



To create a new expense claim click on the 'Create New Claim' button.

Description: Enter the period e.g. November 2016

Reason for Claim: Enter type of claim e.g. Home visits

You will be able to save partially completed claims without actually submitting them for payment. When you are satisfied that you have completed your claim click on the 'Submit' button at the bottom of the expense form.


You will be able to see the details of any claims that you have saved or submitted for authorisation. You will also be able to see claims that have been authorised for payment or rejected by either your manager or the payment team.

Once your manager has approved your claim please print a copy of the submitted claim form and attach your receipts and send to the payment team.

***When you click on the  icon, this text will appear which will show you what you need to enter into the fields and it gives you guidance if you are unsure.***



# Expense Claim Tutorial



ERICA  
H.R. Team  
Assistant -  
Recruitment

Dashboard

View My Training/Absence

My Personal Details ▾

Car Mileage and Expenses ▴

Create New Expenses Claim

Form History

Mansfield DC Expenses Policy

Ashfield DC Expenses Policy

Guidance Notes - Mileage/Exp

Dashboard > Create New Expenses Claim

## Create Expense Claim

### New Claim

?

⌵

Enter your claim form information here

Position

H.R. Team Assistant - Recruitment ▾

Description



Expenses claim for March 2017

Reason for Claim

Expenses during period

1978 characters remaining

Done ✓

Similarly to the mileage claim, just enter the details of the claim and then click on . Then select .





## Adding all details to the expenses claim

### Create Expense Claim

Expenses claim for March 2017

H.R. Team Assistant - Recruitment

Form Info

Claim Information

Date

22/03/2017

Type

Travel Tax

Group

Expenses

Description

Train Fare from Mansfield to Nottingham and return for meeting at County Council

169 characters remaining

Costs and Receipts

Value

12.95


Receipt

1

Cancel

OK ✓

- Now enter the date select the group will be expenses.
- You will then be prompted to select the expenses type and explain what it was for in the description box, select OK again.
- Then add in the costs/value
- For each claim line you should have a receipt for the value being claimed.
- Please enter a number in the receipt box and write the number entered on the actual receipt so that it will correspond with the claim when checked. If no receipt is available for this claim, please leave the receipt box empty.
- All receipts should be attached to the final printed summary.
- Then select OK.

Please note: Click the  icon **In MyView** to access the glossary which will explain what all the field types are.



## Reviewing the expenses claim before submission

Expenses claim for March 2017 H.R. Team Assistant - Recruitment

 Form Info



### Claim Information

Date

Select Date



Group

-- Select Group --



Cancel

OK ✓

 Open

Total Lines: 1 Total Value: £12.95



Cost Centre:

Default Cost Centre

Date

Group

Type

Value

22/03/2017

Expenses

Travel Tax

£12.95



Attachments:

### Your Expense Claim

Total Lines

1


Total Value

£12.95

Submit ✓

Save 

Clear

This is the same as the mileage claim, if you are happy with the claim, submit. If you want to add another claim, select  or if you want to edit the claim you have just made, select the pencil icon.

Select  to continue.



# The summary of the submitted expenses claim

## View Expense Claim

**i** Please print this summary, attach receipts (ensuring that your Line Manager has checked these for verification), and forward the summary to Payroll at:

Payroll  
C/O Human Resources  
Mansfield District Council  
Civic Centre  
Chesterfield Road South  
Mansfield  
Notts  
NG19 7BH

### Expenses claim for March 2017 H.R. Team Assistant - Recruitment

[Form Info](#) [?](#) [↻](#)

**Submitted** Total Lines: 1 Total Value: **£12.95**

Cost Centre:	Date	Group	Type	Value
Default Cost Centre	22/03/2017	Expenses	Travel Tax	£12.95

#### Your Expense Claim

Total Lines 1

Total Value **£12.95**

[Withdraw](#)

[Print Summary](#)


As you can see, when a claim is submitted, the status is showing as submitted, if you want to cancel the claim, select withdraw.

Please print the summary and then attach all receipts and give it to your manager.

That is an expenses claim submission now complete.



## The form history – Where all saved claims go to



ERICA  
H.R. Team  
Assistant -  
Recruitment

Dashboard

View My Training/Absence

My Personal Details ▾

Car Mileage and Expenses ▴

Create New Expenses Claim

Form History

Mansfield DC Expenses Policy

Ashfield DC Expenses Policy

Guidance Notes - Mileage/Exp

My Vehicles

[Home](#) > [Dashboard](#) > [Form History](#)

Form History

Keyword Search

Date from

Date to

Event Filter

Status Filter

Clear search

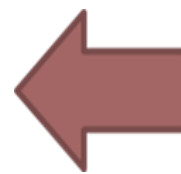
Search

Results per page: 20 ▾ Showing 19 results

Description	Event	Status	Raised Date ▾
<a href="#">dffggh</a>	Expense Claims	Open	30 Mar 2017 ▾
<a href="#">New Claim</a>	Expense Claims	Submitted	30 Mar 2017 ▾

To View form History, click the tab which is under “Create new expenses claim” and this will show you all of the claims you have saved or made, you can filter them just to show the open claims or rejected.

INDEX



Return to expenses claim