

# How to create and submit a travel claim

# In Employee Self Service, select 'Travel and Expenses'

Employee Self Service

**Employee Services**

Map | Directory | Index

- My Processes**  
In this area, you can use the Status Overview service.
- Life & Work Events**  
Forms and related documents for the events that occur during your employment with us including annual leave.
- Salary Statement**  
In this section you can view your salary statement.
- Personal Information**
- Appraisals, Learning & Development**  
View your appraisal and manage your learning and development activities.
- Recruitment & Selection**  
In this area you will be able to search and apply for posts.
- Travel and Expenses** ←
- Employee Relations**

**Related Links**

**Most Frequently Used**

- Create Expense Report
- Traveler Work Center
- Personal Profile
- Contractual Change
- Create Leave Request
- Learning Portal
- Status Overview
- Salary Statement
- Leave Overview
- Appraisal Document
- Work Life Balance

# Select 'Create Expense Report'

The screenshot displays a web application interface for Employee Self Service. At the top, there is a navigation bar with links for Home, Employee Self Service (highlighted), Manager Self Service, Worklist, HR, Specialist, Reporting, Help & Support, and Learn. Below the navigation bar, the page title is "Employee Self Service" and the main heading is "Travel and Expenses". A "Back" link is visible. The main content area is titled "Service Map" and contains two sections: "Overview" and "Standard Journey". The "Overview" section includes a blue car icon, a link for "Create Expense Report" (highlighted with a red arrow), a link for "Traveler Work Center", and a description: "View, Create and Edit Travel expense claims, and Print or Display your Travel Statements." The "Standard Journey" section includes a blue car icon, a link for "Standard Journeys", and a description: "This is where you can find a list of standard journeys between HSC locations."

The first page that opens is where you set the claim period i.e. one month

The screenshot shows a web form for entering claim details. At the top, there are navigation buttons: 'Previous Step', 'Enter Receipts', 'Save Draft', and 'Start Over'. Below these are 'Calendar of Trips' and 'Attachments (0)'. The form is divided into several sections:

- General Data:** Contains 'Start Date: \*' (01.07.2013) and 'End Date: \*' (30.07.2013). Red arrows point to the date and time input fields. A callout box states: 'Please enter a start time of 8:00 and an end time of 17:00, as these times are used as part of the validation process for your claim.'
- Destination:** A dropdown menu showing 'Great Britain'.
- Additional Information:** Contains 'Reason:' (July 2013) and 'Comment:'. A red arrow points to the 'Reason' field, with a callout box stating: 'The reason entered is for your reference only i.e. July 2013'.
- Cost Assignment:** Shows '100.00 % Cost Center H0H800 (HRPTS TASK GROUP), Company Code H001 (BSO)' and a 'Change Cost Assignment' button.
- Mileage:** Shows 'Total Distance: 0 Mile' and an 'Enter Mileage Details' button. A red arrow points to this button.

Enter the dates and times of the claim and the reason for the claim . This is all that is needed. Select Enter Mileage Details

Enter your first journey detail on the open line and select the validate button which will open the rest of the form

Employee Self Service

### Change Expense Report ( 73 )

1. General Data   a Mileage Details   2. Enter Receipts   3. Review and Send   4. Completed

Employee Mrs Gemma Schumacher ( 00047765 )   Start Date 01.07.2013   End Date 30.07.2013

Previous Step   Accept   Save Draft   Start Over

Calendar of Trips

Total Distance Driven: 0 Mile

#### Mileage Details

New Entry   Copy   Delete

Date	Miles Driven	Passengers	*Start Location	*End Location
03.07.2013	5	No passengers	BSO	HSC Leadership Centre

[Standard Journey Lookup](#)

**VALIDATE**

Mileage Reimbursement Group: Admin & Clerical

Vehicle Class: Standard Upto 1000cc   Mileage Type:   License Plate:   Comment: \*

When the form opens you will need to complete the Mileage Type, Licence Plate and Comments box. The Vehicle Class and Mileage Reimbursement Group will already be set

Employee Self Service

General Data Mileage Details General Data Enter Receipts Review and Send Completed

Employee Mrs Gemma Schumacher ( 00047765 ) Start Date 01.07.2013 End Date 30.07.2013

Previous Step Accept Save Draft Start Over

Calendar of Trips

Total Distance Driven: 5 Mile

Mileage Details

New Entry Copy Delete

Date	Miles Driven	Passengers	*Start Location	*End Location
03.07.2013	5	No passengers	BSO	HSC Leadership Centre

Standard Journey Lookup

VALIDATE

Mileage Reimbursement Group: Admin & Clerical

Vehicle Class: Standard Upto 1000cc

Mileage Type: Business Mileage

License Plate: MR656 TY

Comment: \*  
return journey  
ESS/MSS Awareness session

Accept Accept and New Entry Change Cost Assignment Copy Delete

BSO &Regional Orgs  
Licence Plates  
should be input  
without spaces

The comment should include the  
reason for travel, places visited if  
multiple and passenger name if  
applicable

Select Accept and New Entry to open a new  
row to enter further journeys

Once you have entered all the journeys select 'Accept' to move to the next stage

Employee Self Service

Total Distance Driven: 170 Mile

**Mileage Details**

New Entry Copy Delete

Date	Miles Driven	Passengers	*Start Location	*End Location
03.07.2013	5	No passengers	BSO	HSC Leadership Centre
10.07.2013	80	No passengers	BSO	Tower Hill, Armagh
17.07.2013	5	No passengers	BSO	HSC Leadership Centre
24.07.2013	80	No passengers	BSO	Tower Hill, Armagh

[Standard Journey Lookup](#)

VALIDATE

Mileage Reimbursement Group: Admin & Clerical

Vehicle Class: Standard Upto 1000cc

Mileage Type: Business Mileage

License Plate: MR565 TY

Comment: \*  
return journey  
ESS/MSS Awareness Training

Accept Accept and New Entry Change Cost Assignment Copy Delete

Accept Save Draft Start Over

Please note you can also select Save Draft once you have completed an entry to save your work and return to it at another stage

You will return to the homepage where you should select Enter Receipts to either add receipts and/or submit your mileage claim

Employee Self Service

1 General Data 2 Enter Receipts 3 Review and Send 4 Completed

Employee Mrs Gemma Schumacher ( 00047765 )

Previous Step **Enter Receipts** Save Draft Start Over

Calendar of Trips Add to Enter Receipts

**General Data**  
Start Date: \* 01.07.2013 09:00  
End Date: \* 30.07.2013 17:00

**Destination**  
Country / Region: Great Britain

**Additional Information**  
Reason: July 2013  
Comment:

Cost Assignment: 100.00 % Cost Center E0A943 (ASST DIR FINANCE), Company Code E001 (Western - HS) Change Cost Assignment

**Mileage**  
Total Distance: 170 Mile Enter Mileage Details

You will see your total miles claimed for



# Choose the type of claim that you are making from the Expense Type menu

The screenshot shows the 'Employee Self Service' interface for 'Change Expense Report ( 73 )'. The process is in the 'Enter Receipts' step. The employee is Mrs Gemma Schumacher (0004776) with a start date of 01.07.2013 and an end date of 30.07.2013. The 'Receipts in This Expense Report' table has one entry with an amount of 0.00. The 'Expense Type' dropdown menu is open, showing various options, with 'Car Parking Fees' highlighted by a red arrow.

Employee Self Service

### Change Expense Report ( 73 )

General Data   Enter Receipts   Review and Send   Completed

Employee Mrs Gemma Schumacher ( 0004776 )   Start Date 01.07.2013   End Date 30.07.2013

Previous Step   Review   Save Draft   Start Over

#### Receipts in This Expense Report

New Entry   Copy   Delete

No.	Status	Expense Type	Receipt Amount	Receipt Currency	Receipt Date	Amount	Local Currency	Paper Receipt	Origin
001		Car Parking Fees	0.00	British Pound	01.07.2013	0.00	British Pound	<input checked="" type="checkbox"/>	Entered Manually

Previous Step   Review   Save Draft   Start Over

A form will open relating to the type of claim you are making, fields marked with \* are mandatory

Employee Self Service

### Change Expense Report ( 73 )

1 General Data 2 Enter Receipts 3 Review and Send 4 Completed

Employee Mrs Gemma Schumacher ( 47765 ) Start Date 01.07.2013 End Date 30.07.2013

Previous Step Review Save Draft Start Over

#### Receipts in This Expense Report

New Entry Copy Delete

No.	Status	Expense Type	Receipt Amount	Receipt Currency	Receipt Date	Amount	Local Currency	Paper Receipt	Origin
001		Car Parking Fees	3.00	British Pound	03.07.2013	0.00	British Pound	<input checked="" type="checkbox"/>	Entered Manually

Tax Code: Exempt from input VAT

From Date: \* 03.07.2013 To Date: \* 03.07.2013

Description:

Document No.:

Business Purpose: \* ESS/MSS Awareness Training

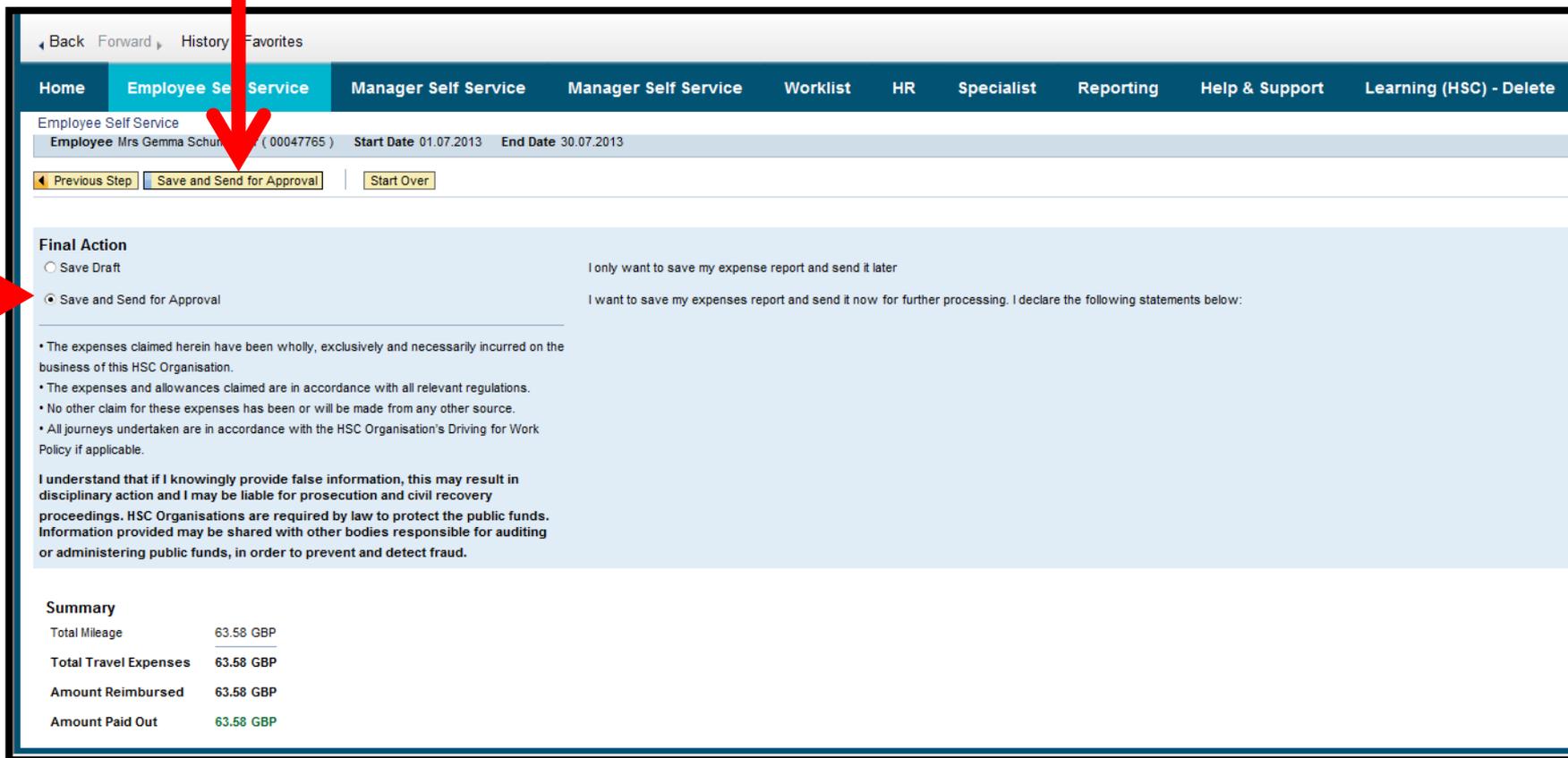
Comment:

Accept Accept and New Entry Change Cost Assignment Enter Itemization Check Copy Delete

Select either 'Accept', 'Accept and New Entry' or 'Save Draft' depending on the action you want to take. To move to submission select Accept



A summary of your claim will be shown. Change the radio button to 'Save and Send for Approval' and select the 'Save and Send for Approval' button



The screenshot shows a web application interface for 'Employee Self Service'. At the top, there is a navigation bar with links: Home, Employee Self Service (highlighted), Manager Self Service, Manager Self Service, Worklist, HR, Specialist, Reporting, Help & Support, and Learning (HSC) - Delete. Below the navigation bar, the user's name 'Employee Mrs Gemma Schurmann (00047765)' and dates 'Start Date 01.07.2013 End Date 30.07.2013' are displayed. A row of buttons includes 'Previous Step', 'Save and Send for Approval' (highlighted with a red arrow), and 'Start Over'. The main content area is titled 'Final Action' and contains two radio button options: 'Save Draft' and 'Save and Send for Approval' (selected with a red arrow). Below the radio buttons, there is a declaration section with a list of terms and conditions, followed by a warning about providing false information. At the bottom, a 'Summary' table is displayed.

Summary	
Total Mileage	63.58 GBP
Total Travel Expenses	63.58 GBP
Amount Reimbursed	63.58 GBP
Amount Paid Out	63.58 GBP

Please note you can also select Save Draft and return to review/ edit/ submit your claim at another stage

If the claim has been successfully submitted you will see two green ticks. Your claim will now be in your expense approver's worklist for them to approve or reject.

The screenshot shows the 'Employee Self Service' interface. At the top, there is a navigation bar with 'Employee Self Service' selected. Below this, the page title is 'Employee Self Service'. The main content area is titled 'Change Expense Report ( 73 )'. A progress bar shows four steps: 1. General Data, 2. Enter Receipts, 3. Review and Send, and 4. Completed. Below the progress bar, the employee information is displayed: 'Employee Mrs Gemma Schumacher ( 00047765 )', 'Start Date 01.07.2013', and 'End Date 30.07.2013'. There are two buttons: 'Previous Step' and 'Save and Send for Approval'. Below this, there are two green checkmarks with text: 'Expense report 0000000073 was saved' and '100.00 % will be assigned acc. to trip costs assignment guidelines'. A 'Display Expense Form' button is located below the checkmarks. At the bottom, there are two more buttons: 'Previous Step' and 'Save and Send for Approval'. Red arrows point to the 'Display Expense Form' button and the two green checkmarks.

You can also select the Display Expense Form to view a PDF version of your claim which can be printed