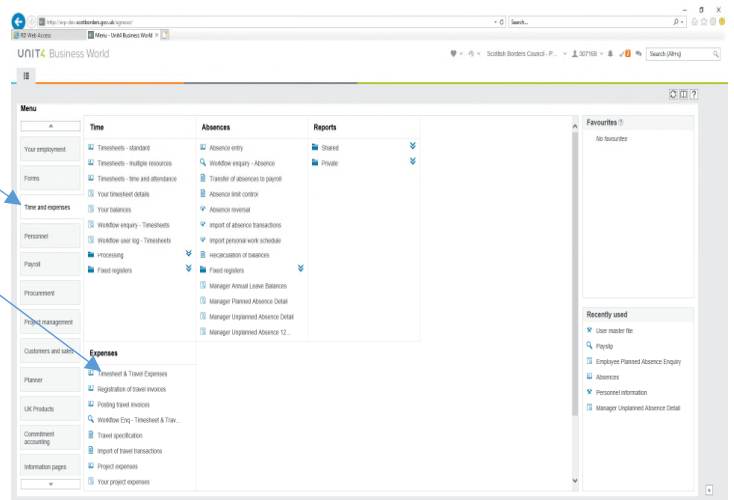
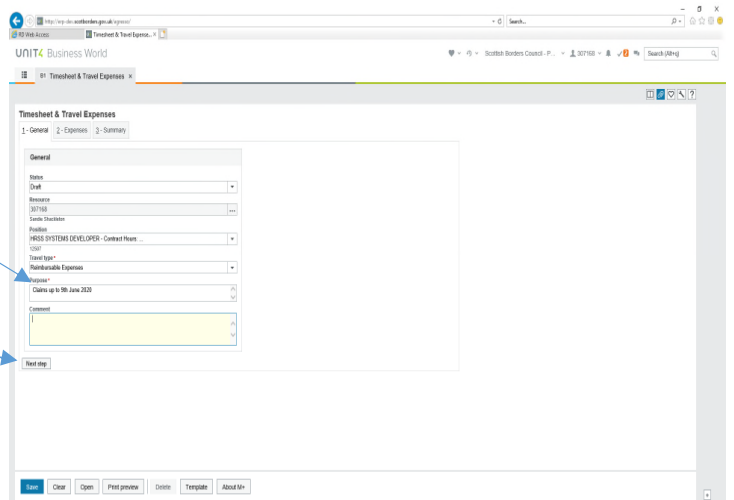


Expenses/Mileage Claims in Business World

To claim expenses/mileage within Business World, go to Time and expenses and click on Timesheet & Travel Expenses.

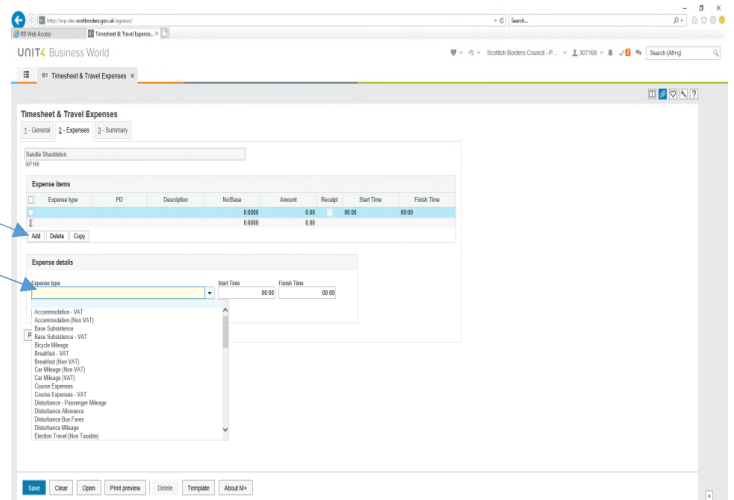


The Purpose field should be input with a title for the claim, e.g. 'Claims up to 9th June 2020'. This field is marked with a * which means it is mandatory and so must be filled out in order to continue with the claim. The comments field is optional and can be completed with additional information regarding the claim if required.



Once done, click Next step.

This will take you to the Expenses tab where you can input details of the expense/mileage to be claimed. Click Add to get to the Expense details section where you can input your claim.



Click the Expense type drop down list and select the relevant expense type for the claim you are making. If you are claiming for mileage you should select either Car Mileage (VAT) or Car Mileage (Non VAT) depending on whether you have a VAT receipt or not.

Once you have selected your expense type, make sure the Position field shows as the position the claim refers to (if you have more than one post). If you have only one post, the position field will default in with your post details.

Input a Description for the claim in the field provided and amend the date field to show the date the claim relates to.

If you have selected a mileage expense type, you must input the Total miles field with the total number of miles for the whole journey. The Unpaid miles field should then be input with any mileage that should not be paid (e.g. home to work mileage). The system will then calculate the total miles to be paid as Total miles minus Unpaid miles when the claim is processed through payroll.

If you select a non-mileage expense type, the monetary value of the expense should be input in the Amount field.

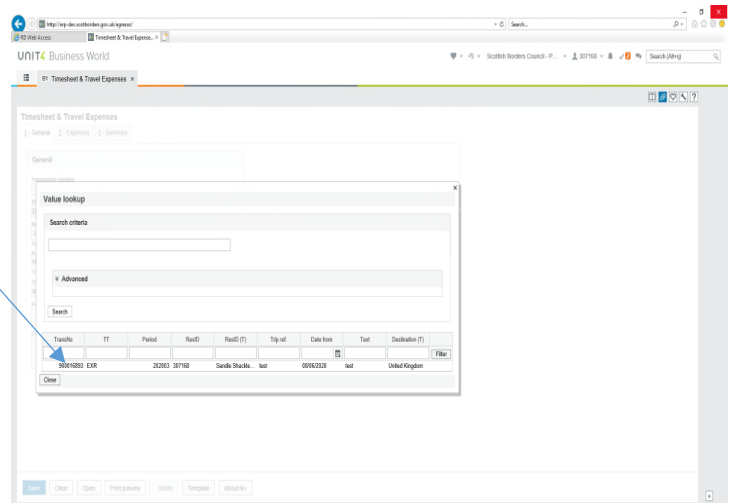
The GL Analysis section will default in the cost centre your position is linked to. If the claim is to be paid against another cost centre, this code should be changed here.

Once complete, you can click Add again and repeat the steps as above for any additional expenses to be paid as required.

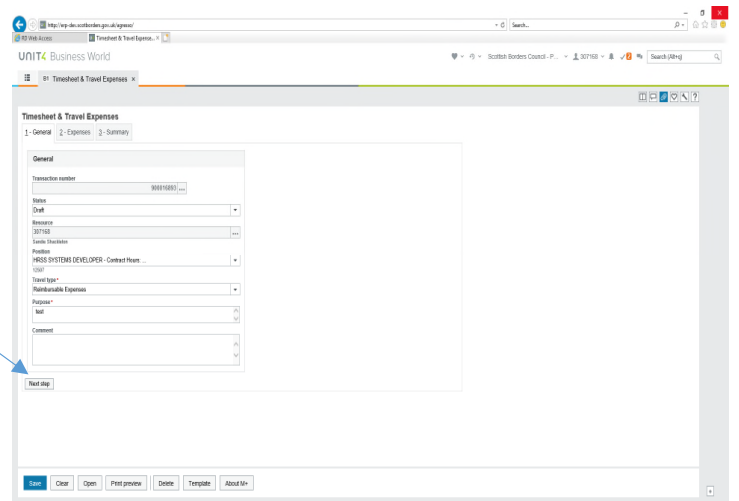
A claim form can be kept open as a draft form and expense lines added as and when required up until the point you want to send it for approval within the payroll deadlines. Click Save at any point to save the form as draft.

To access a form saved as draft, go to Time and Expenses – Timesheet & Travel Expenses then click Open.

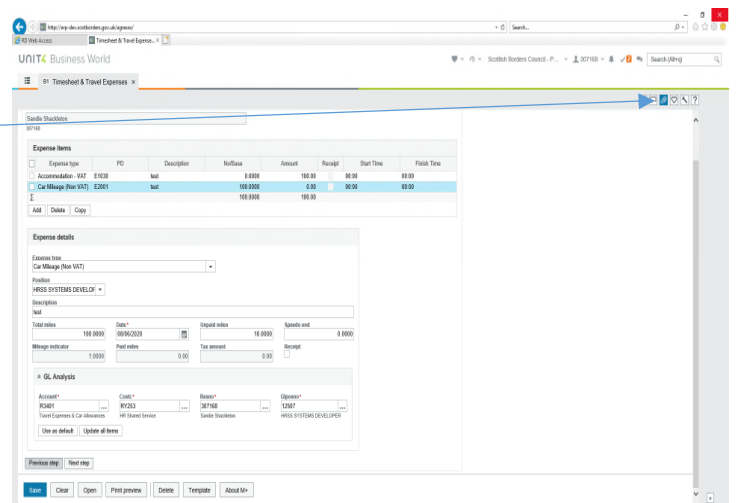
Any claim forms currently in draft will display and you can click on the relevant TransNo to open the claim.



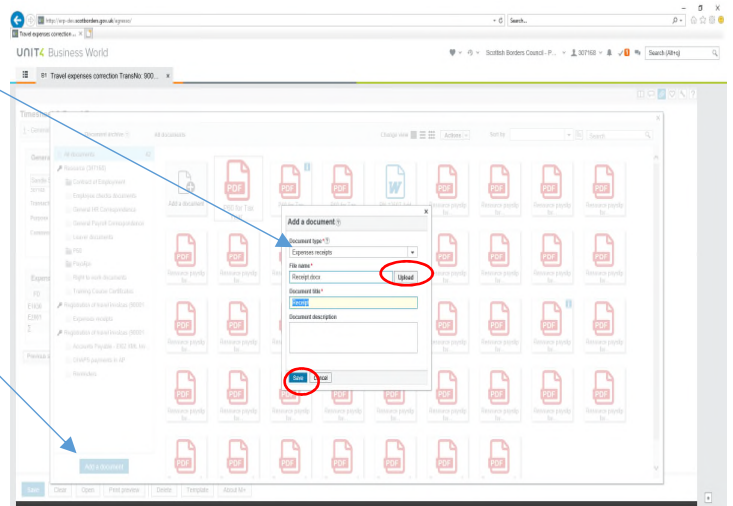
Click Next Step to take you back to the Expense details tab where you can then add further claim lines as required.



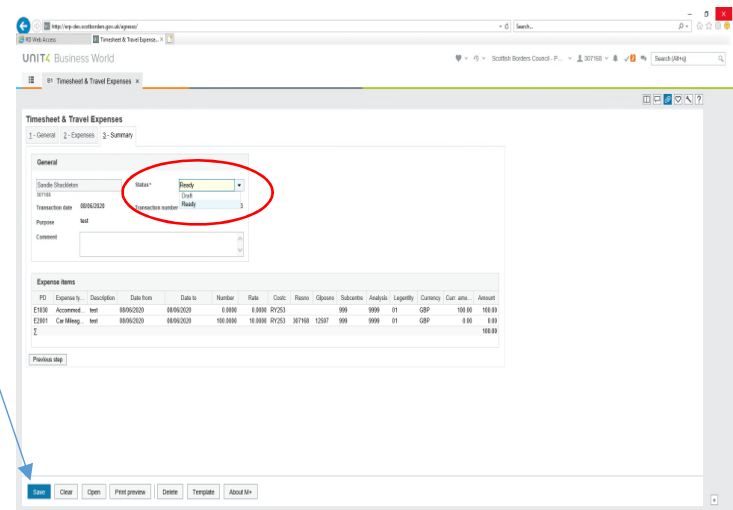
Any receipts etc relating to the claim can be uploaded to the claim either as a scanned copy or a photo of the receipt saved to your device. Click the Paperclip icon to the right of the screen.



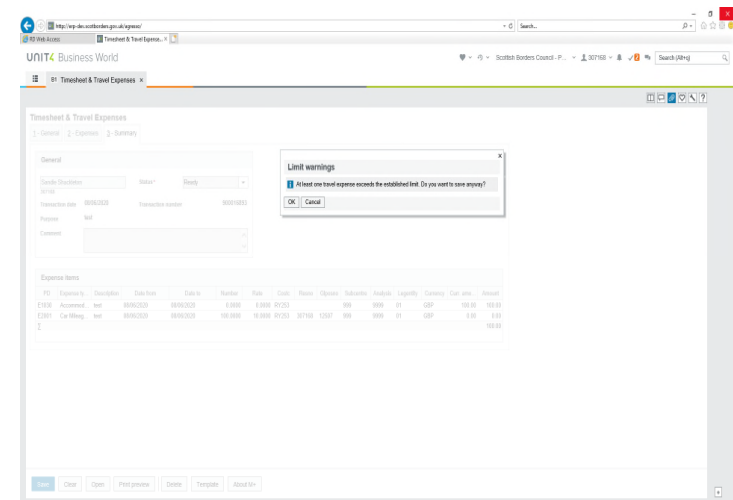
Click Add document, select Expenses receipts as the Document type and click Upload to find the file on your device. Once attached, click Save.



Once all claim lines have been added, click Next Step to move to the Summary tab. Amend the Status field from Draft to Ready and click Save.

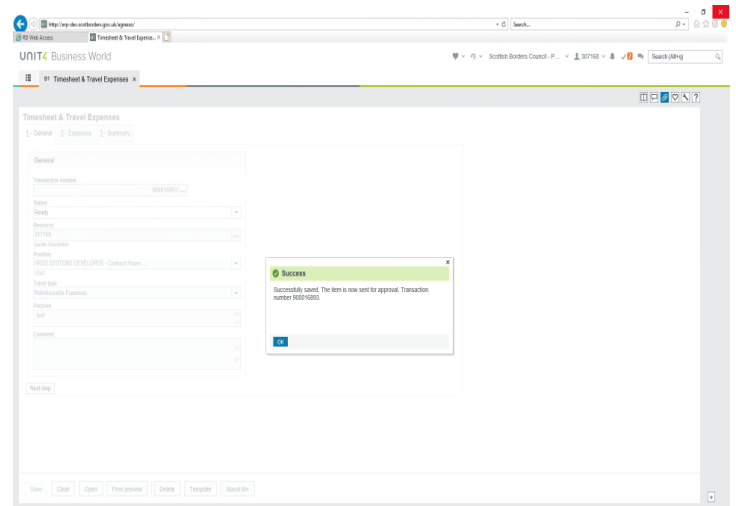


Warning limits have been set against relevant expense types in line with SBC's expenses policy. If one or more of your claim lines exceeds these limits, a warning will display when you try to save. This is just a warning and if you click OK, the whole claim will go for approval but it will be at your managers discretion whether this is approved or not. Your manager will also see this warning when they receive the approval task.

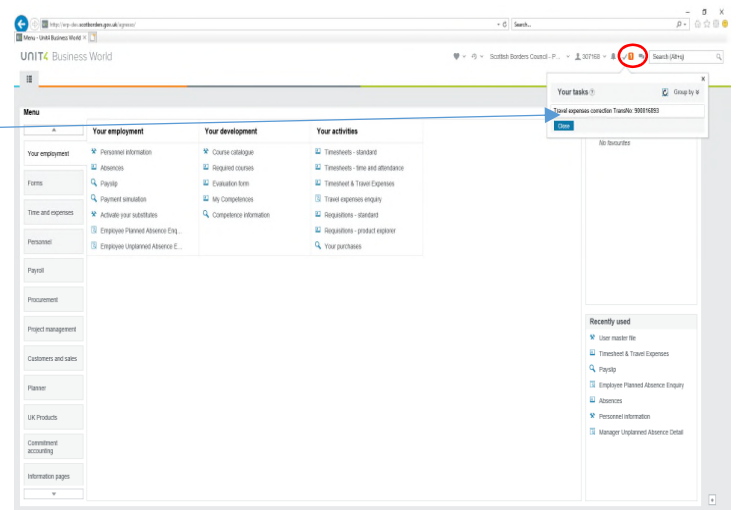


Once saved with a Ready status, you will receive a message to say the claim has been successfully saved and has been sent for approval.

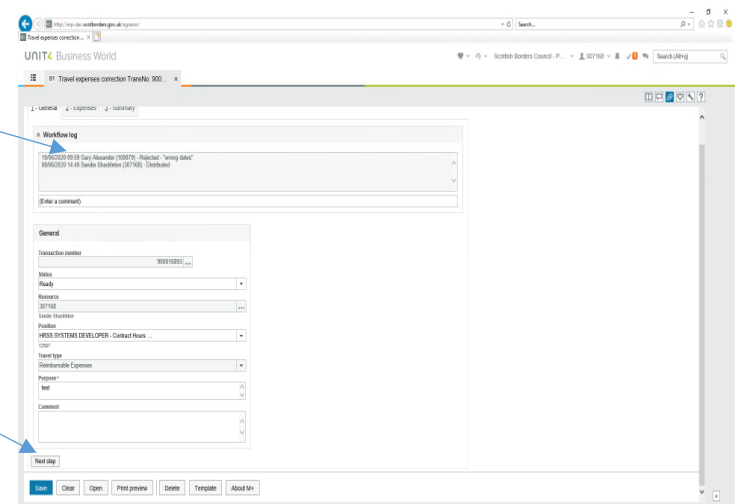
Your manager will then receive a task to either approve or reject the claim. If they approve it, you will receive an email notifying you that the claim has been approved and it will automatically transfer to payroll to be paid in the next available pay run.



If your claim is rejected, you will receive an expense correction task to action. Click the Tick icon at the top right of the screen and click on the TransNo to take you back into the claim form.



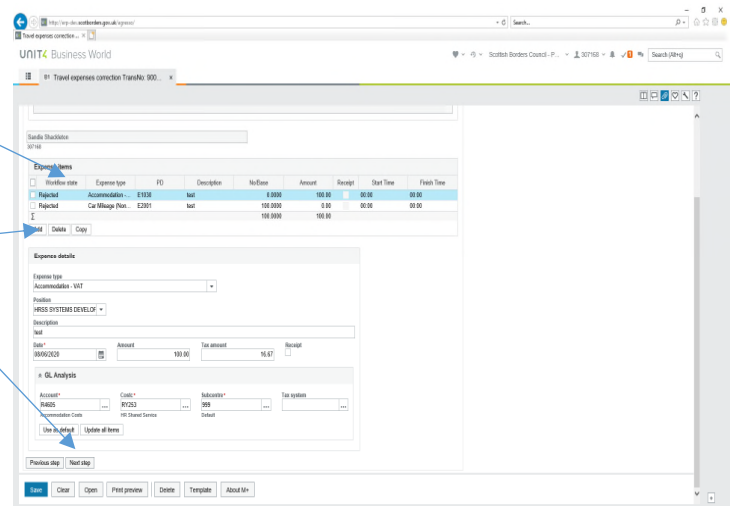
The workflow log will show you the comment left by your manager as to why the claim has been rejected. Depending on the issue, you can amend or delete the claim line and then resubmit. Click Next Step to take you back to the Expenses tab.



Click on the relevant expense item to bring up the details in the Expense details section. If the claim line requires an amendment, you can then make the necessary changes here.

If the claim line is to be removed altogether, tick the box next to the claim line in the Expense items section and click Delete.

Once the relevant changes are made, click Next step.



This will display the summary of the claim form. Make sure the Status field shows as Ready and click Save. This will then resubmit the claim for approval to your manager, as above.

