

## How to Submit Car Mileage and Expenses Claims

[Video Guidance is also available by clicking here.](#)

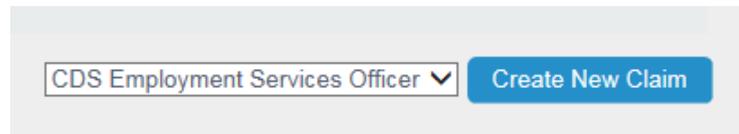
### How to Complete a New Claim

- Log into MyView and click on **New Car Mileage / Exp Claim**.



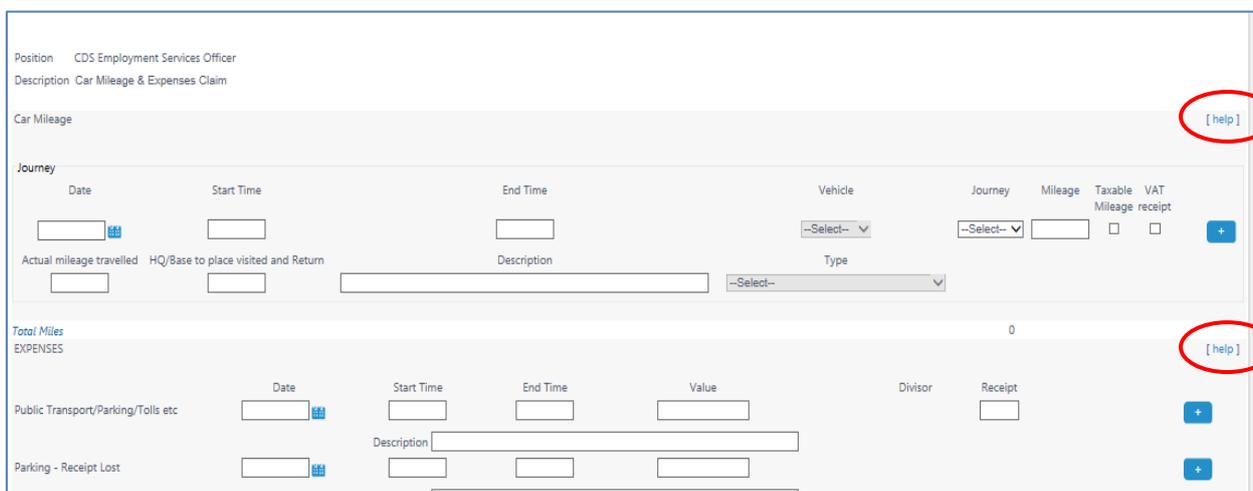
The Car Mileage and Expenses Module will display.

- If you have more than one post, please ensure you select the correct post from the drop down list.
- Click on **Create New Claim**.



The Car Mileage and Expenses form will open as shown below. Before you submit your first claim, please ensure you have read and comply with the information in the Travel and Subsistence Policy.

- Click **[help]** to view on screen instructions which are available within this module to assist with the completion of the form for mileage and expenses claims.

A screenshot of a web form titled 'Car Mileage & Expenses Claim'. The form is divided into several sections. At the top, it shows 'Position: CDS Employment Services Officer' and 'Description: Car Mileage & Expenses Claim'. Below this is a 'Car Mileage' section with a '[ help ]' link circled in red. The 'Journey' section contains a table with columns for Date, Start Time, End Time, Vehicle, Journey, Mileage, Taxable, and VAT Mileage receipt. Below the table are fields for 'Actual mileage travelled', 'HQ/Base to place visited and Return', 'Description', and 'Type'. A 'Total Miles' field shows '0'. The 'EXPENSES' section has a '[ help ]' link circled in red and contains a table with columns for Date, Start Time, End Time, Value, Divisor, and Receipt. Below the table are fields for 'Description' and 'Receipt Lost'.

## Mileage Claim

- **Date** - Click on the calendar icon next to the date field and select the date of your journey.
- **Start Time/End Time** - Insert the start and finish times of your journey using the 24 hour clock, you do not need to insert an hour/minute divider.

| Journey    |            |          |
|------------|------------|----------|
| Date       | Start Time | End Time |
| 01/03/2017 | 14:00      | 15:00    |

- **Vehicle** - Your vehicle registration number will show in the vehicle box, if you have more than one vehicle registered with us for business mileage, click on the down arrow and select the vehicle you require for this journey.
- **Journey** – Please ignore this field.
- **Mileage** - Please leave this blank as the field will automatically populate using the "lesser of" rule. For more information about the "lesser" of rule, please click on the link to the guidance at the top of the screen.
- **Taxable Mileage** - if you are travelling from home, and the lesser of has not been claimed, the mileage is taxable, you should click on the check box for Taxable Mileage and a tick will appear.
- **VAT receipt** – Tick this box to confirm that you have a valid VAT receipt for fuel covering the mileage on your claim form.

| Vehicle | Journey    | Mileage | Taxable Mileage                     | VAT receipt                         |
|---------|------------|---------|-------------------------------------|-------------------------------------|
| KM09XPE | --Select-- | 0       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

- **Actual mileage travelled** - Insert the number of actual miles travelled.
- **HQ/Base to place visited and return** - Insert the number of miles which have been or would have been travelled had you gone from base (your normal place of work as per your contract of employment) to the place(s) visited and return. If you are travelling from home and return, outwith normal working hours e.g. to an evening meeting or in an emergency call out situation, your Actual Mileage Travelled and HQ/Base to place visited and return should be the same, and claim the mileage as taxable by clicking the box marked "taxable".

| Actual mileage travelled | HQ/Base to place visited and Return |
|--------------------------|-------------------------------------|
| 5                        | 15                                  |

- **Description** - Provide a description of all journeys travelled including a reason for the journey e.g. Pullar House to Loch Level Community Campus and return for Meeting or Home to Falkirk for Meeting, then to base.
- **Type** - Click on the down arrow and select the mileage scheme appropriate to your terms and conditions.
- To enter another journey click on the **[+]** button.

- Once you have made all your entries for mileage, if you have no Expenses to claim, click on **[Submit]**.
- You will be shown a summary screen showing the details of your claim as shown below. You should print this off, attach your receipts and retain it for 7 years as per HMRC regulations.

|                          |  |
|--------------------------|--|
| Employee Number          |  |
| Employee Name            |  |
| Post                     | CE Information Systems & Development Off |
| Claim Number             | 0000001175                               |
| Claim Date               | 07/09/2011                               |
| Claim for the following: |  |
| <b>EXPENSES SUMMARY</b>  |  |
| EXPENSES                 | 11.67                                    |
| <b>TOTAL EXPENSES:</b>   | <b>11.67</b>                             |
| <b>MILEAGE SUMMARY</b>   |  |
| Date                     | 11/04/2011                               |
| Description              | bbbbbbbbbbbbbbbbbbbbbbbbbbbbbb           |
|                          | 50                                       |

Once your request has been authorised/rejected by your budget manager, an e-mail will be sent informing you of the decision.

You can partially complete your form and **Save** it at any point, then go back to it at a later date to fill in further details. We would advise that you save your form frequently, so that if you make an error and need to remove a line, when you hit **[Reset]** you don't lose all of your information. Please note you have to submit your claim for payment. Saving your claim does not trigger a submission to your Manager.

### Expenses Claim

- **Date** - Click on the calendar icon next to the date field in the category required, subsistence, parking, meals etc., and select the date your expenses were incurred.
- **Start Time/End Time** - Insert the start and end times using the 24 hour clock, you do not need to insert an hour/minute divider

The start and end time field is set up to automatically reject if the end time is earlier than the start time, which may not be the case if you arrive at a hotel at 7pm and leave at 9 am the next morning. If you are claiming for a hotel stay, please insert an end time later than the start time even if this is not the case as the processing will recognise that this is valid for a hotel stay. If you are staying for more than one night, you only need to input the start date of your stay.

- **Value** – Insert the value you are claiming. For a hotel stay insert the value for the whole of your stay, excluding alcohol and tips, as per Council policy, you can see this by clicking on the link at the top of the screen.

| EXPENSES                           |                                  |                      |                      |                      |                      |                      |
|------------------------------------|----------------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
|                                    | Date                             | Start Time           | End Time             | Value                | Divisor              | Receipt              |
| Public Transport/Parking/Tolls etc | <input type="text"/>             | <input type="text"/> | <input type="text"/> | <input type="text"/> |                      | <input type="text"/> |
|                                    | Description <input type="text"/> |                      |                      |                      |                      |                      |
| Parking - Receipt Lost             | <input type="text"/>             | <input type="text"/> | <input type="text"/> | <input type="text"/> |                      |                      |
|                                    | Description <input type="text"/> |                      |                      |                      |                      |                      |
| Subsistence (Hotels)               | <input type="text"/>             | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

- **Divisor** - If your stay was for more than one night, insert the number of nights. The system then calculates a per night rate which it checks against the Council maximum amount claimable per night.
- **Receipt** - insert a receipt number against this expense, something as simple as 01, 02, 03 will be sufficient. You should write the number on your receipt and attach it to the summary of your claim when you print it out.
- **Description** - add a note to explain a description of the claim “Train Ticket to Glasgow for Conference” to provide more information for your budget manager.
- To enter another expense claim click on the **[+]** button
- To remove a line you have inserted accidentally, click on the **[+]** button at the end of the row. This will generate a new blank line and also insert a **[-]** on the previous row so it can be removed.
- Once you have made all your entries, and your claim is complete, click on **[Submit]**.
- As before, you will be shown a summary screen showing the details of your claim.
- Click on **[Continue]** which will take you back to your claims history page.

## How to Check Historical and Current Claims

There are two ways to view historical claim information and to check the current progress of your mileage and expenses claims; through the **Car Mileage and Expense Modules** and the **Form History** function.

### Module Access

- Click on **New Car Mileage / Exp Claim**
- This will show all your claims and what status they are at (*Open/ Submitted/ Authorised/ Rejected/ Withdrawn*) as shown in the example overleaf.

**Car Mileage & Travel Expenses Claims [ You have 2 claims ]**

This area is for Car Mileage/Motorbike and expenses claims only. You cannot claim for Excess Mileage or Bicycle Mileage through MyView.

To start a new claim, select your post (if you have more than one, click on the down arrow) in the box at the bottom right of your screen, then click **Create New Claim**.

You can only use MyView to claim for your current post so if you are leaving the Council or changing posts you must claim for your mileage before your leaving date or before the end date of your current post.

If this is the first time you have claimed mileage/expenses whilst working for Perth & Kinross Council, you will need to create a vehicle record. Click [Back] and go to the Your Vehicles section and follow the guidance.

You can link to the Council's policies and procedures by clicking on the links in the top right hand corner of the screen.

Please note, only the value of expenses eg meals etc will show below, this screen does not show cash values for mileage.

If you are a manager and you have accessed this area via My People, you can access historical claims for any member of staff within your team. Click on the form number to view full details of their claim.

[PKC Travel & Subsistence Policy](#)  
[PKC Travel & Subsistence Toolkit](#)  
[MyView Mileage & Expenses Guidance](#)  
[MyView Single Status Car User Types](#)  
[MyView Errors & Warnings Guidance](#)  
[MyView Manager's Checking Process](#)  
[MyView Car Mileage/Travel Expenses Q&As](#)  
[MyView Manager's Guide to Auth/Rejection](#)

| Open       |            |                              |       |
|------------|------------|------------------------------|-------|
| Date       | Form       | Description                  | Value |
| 23/03/2017 | 0000051000 | Car Mileage & Expenses Claim | 0.00  |

| Rejected                                       |            |                              |       |
|--|------------|------------------------------|-------|
| Date   | Form       | Description                  | Value |
| <input checked="" type="checkbox"/> 06/04/2017 | 0000051503 | Car Mileage & Expenses Claim | 75.00 |

Any forms which you have saved but not yet submitted will be shown in the **Open** panel on your MyView Mileage and Expenses area.

- Click on the claim form number to reopen the request. This will display the form so you can continue to save mileage and expenses prior to submitting.

| Date       | Form       | Description                  |
|------------|------------|------------------------------|
| 23/03/2017 | 0000051000 | Car Mileage & Expenses Claim |

- If you have any forms which have been rejected, and you would like to resubmit, click on the form number and click on **Re-open** at the bottom of the form. This will allow you to amend the required information and then resubmit.

|  |            |             |       |       |   |    |   |
|--|------------|-------------|-------|-------|---|----|---|
| Afternoon Tea  |            | Description |       |       |   |    |   |
| Evening Meal   |            | Description |       |       |   |    |   |
| <input checked="" type="checkbox"/> Subsistence (Hotels)   | 06/03/2017 | 08:00       | 23.00 | 75.00 | 1 | 01 |   |
| <b>WARNING!</b> - This claim has exceeded the maximum limit as defined by the expenses policy. Maximum value for this item is £ 69 |            |             |       |       |   |    |   |
| Total for EXPENSES   |            |             |       | 75.00 |   |    |   |
|  |            |             |       |       |   |    | <input type="button" value="Back"/> <input style="border: 2px solid red;" type="button" value="Re-open"/> |

## Form History

- You can use the MyView Form History module to withdraw a claim that has been submitted and also check the progress of claim authorisations.
- Click here for further guidance on how to use [Form History](#).