Guide to Claiming Reimbursement of Mileage in Employee Self Service (ESS) referred to as Paid Mileage

Before making a claim, please familiarise yourself with the Council's *Scheme for Payment of Travelling Expenses, Subsistence Allowances and Redeployment Expenses* policy available on Inform.

This policy should be read in conjunction with the *Council's Driving on Council Business Policy* that ensures risks associated with driving on Council business are effectively managed.

To claim, log into your ESS account. If you have not already done so, please add in your Vehicle details from 👤 View profile in the top left-hand corner under your name and scroll down to the bottom to the section **Private vehicles** and click **Add vehicle**. The start date must cover the first claim made but for completeness, use 1st April 2022 or the date you commenced employment with the Council, if later than this date.

If you try to make a claim before entering your Vehicle details, a warning message will appear ❌ No vehicles found

You can add more than one vehicle and should tick ☑️ Default vehicle for expenses on the vehicle you will make claims against.

Your manager is responsible for entering your Driving licence and Insurance details and once this takes place the Insurance information feed through to the Vehicle page. Until this takes place it will default to No. At this early stage, it will not prevent you from claiming paid mileage but moving forward, in a few months, this information will be required before claims can be made.

Insurance checked

No

Insurance expiry date (dd/mm/yyyy)

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From the Homepage, go to the 🖥️ My pay option from the left-hand pane and then to the Time & expenses option **My pay** Time & expenses from the middle section.

Please note: claims for journeys undertaken prior to 1st December 2022 should be made using the spreadsheet provided and passed to your manager for authorising. Your manager will arrange for this to be passed onto your Chief Officer who will need to approve and forward to payroll with an accompanying note to explain why the claim is over three months old. Payroll cannot process without this information.

Before you make any claims, you will note the message *No paid mileage details have been added yet* and as you start to make claims, a history of claims will build up and you will be able to check if the claim has been authorised.

Click **+ Add paid mileage**

Add in the date you are claiming for (you cannot proceed without this) by using the calendar or typing directly into the field.

If you have more than one position, choose the position you wish to claim reimbursement against. It is important you select the correct position to ensure your mileage is costed correctly.

Your Vehicle registration will pull through automatically and the Scheme is RCT Casual Rate which is also pre-populated.

The paid mileage reimbursement is based on the shortest journey and uses Post Code to Post Code functionality. You will need the post codes of where you are travelling from and to. There are no favourite or standard journeys you can choose from; this is something the software company are still working on, and this will be available in a future release. If you do not have the post code, you can type the street name and Town into the Start location but there is no guarantee you will be able to find the location, the exact post code is always the best option.

Please note: you should familiarise yourself with the examples set out on page 2 & 3 of the travel policy to ensure the shortest route is undertaken.

Enter the post code you are travelling from and choose the full address from the drop-down list. If you type in the Start location post code and then move directly to the destination

post code without choosing the full address, the claim will not process and this cog will appear. Click in the top left-hand corner on the RCT logo and the following message will appear:
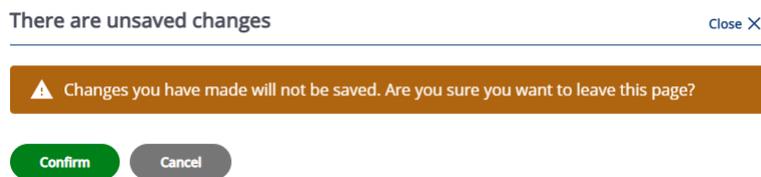
You must choose Confirm and start again.

Once you have entered the Start location and chosen the full address, enter the post code of your destination and choose the full address in the same manner.

You can claim for several journeys in one day by choosing the next destination post code and full address if you are moving from one meeting / address to another.

The CALCULATE button will show you a map of the journey and the total miles but you still need to SAVE the claim and SUMBIT once you are ready to send on for authorising. If you SAVE the form, you have not submitted and can add on additional journeys. Once you have competed the journeys for that day, SUMBIT to send to your authoriser.

If you SUBMIT a claim too soon and have another journey to claim, the system will allow you to sumbit another claim for the same day.

You can also remove a journey and delete a claim, either before submitting or whilst it is awaiting authorising. Care should be taken if you remove a journey or delete a claim whilst it is at the awaiting authorising stage, and you should advise your manager if you make these changes.

Once the claim has been authorised by your manager, you cannot make any changes but can view the authorised claims.

Understanding the status of your claims from the paid mileage summary page:

The Start and End dates can be amended if you are searching for previous claims.

In Progress:

- Provisional – you have saved the claim (can add to it at this stage) but you have not submitted for authorisation
- Awaiting authorisation – you have submitted the claim for authorisation, but the claim has not been authorised
- Refused – your manager has rejected the claim and you should make the adjustments and resubmit or delete if the claim is not required

Authorised:

- Authorised – your manager has authorised the claim

Paid mileage claims are daily and should be submitted for authorising on a regular basis (daily if possible but at least weekly). As described above, the claim can be saved and revisited but each day has to be submitted separately. There is no provision to send one claim for all journeys undertaken for the month.

Please note: your manager may reject a claim if there are queries. Rejecting one day has no bearing on the other days in the month as the claims are individual.

You will receive an email alert if your manager rejects a claim and should either delete the claim if it was made in error or amend and resubmit for authorising as described above:

In exceptional circumstances, such as a road closure or temporary roadworks, claimants can increase the mileage calculated using the override miles field. For example, if the calculated journey is 25.7 miles and the correct distance is 30 miles, enter 30 in the Override miles field and SAVE / SUBMIT. The summary will show the calculated miles of 25.7 but payment will be made based on the 30 miles claimed as an override.

Claims Paid:

You are advised to claim as you are making the journeys, i.e., daily if possible but do not leave longer than a week. Submit your claims for authorising as you are making the claims to enable your manager to authorise in the same manner, i.e., daily or weekly. If you claim in this manner and everything is authorised, in your pay on 15th should be mileage for the previous month, up to month end.

There is no set deadline as with Envoy expense but, as mentioned several times in the guide, please claim and submit regularly and this should ensure you receive mileage reimbursement one month in arrears, i.e., journeys undertaken in February, up to the last working day, should be included in March's pay.