

Managers guide to authorising Reimbursement of Mileage referred to as Paid Mileage in iTrent

Staff are advised before making a claim, to familiarise themselves 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.

Please refer to the Claimant user guide for full details on how to claim; this guide covers the manager's responsibilities.

Managers are responsible for entering the Driving licence and Insurance details for staff within the core system, using the Manager role. To do this, access the employee's record in iTrent and on the front page, click on the Personal information link

Personal information

and the two links below are present:

Driving licence details Vehicle Insurance Details

For the next three months, staff will be able to claim mileage without the licence and insurance details however, managers are required to update the information for all staff claiming mileage and should do so over the next three months. After this period, audit checks will be placed on the fields and managers will be contacted if the information is missing from the records.

As with Envoy expense, the end date of the licence should be one year from the date you enter the details. The licence should be checked annually and the date moved on one year each time the check is undertaken. The team are working on email alerts to remind managers when the dates are due to expire and further information will follow.

A Managers' responsibilities in relation to staff undertaking business journeys are set out in section 7, page 9 & 10 of the Driving on Council Business policy. Appendix 3 on page 22 sets out the different licence categories and there is a checklist on page 27 (age 27 (Appendix 4) for managers to follow when checking driving licences.

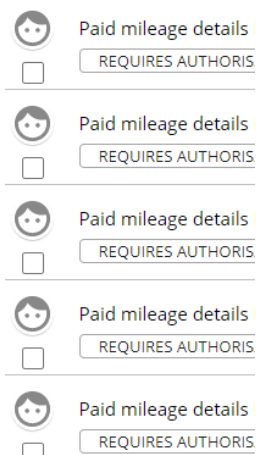
To check if you have mileage claims to authorise, on the homepage in iTrent, you have a tile:


My to do list (0) / Processes (0)



If you have authorising, a number will appear in the *My to do list* tile on the homepage as shown here My to do list (5) / Processes (0)

Click on the above header and you will be taken to the list of tasks for authorising.



To go to the task and check the details before authorising, click on the arrow at the end of the entry 

Check the details and to authorise, go to the Authorisation section at the bottom of the page and in the Authorisation status field, choose Authorised and SAVE.

You will be taken back to the task list and will note the entry has disappeared. Continue authorising claims for your team and log in on a regular basis to check for authorising.

If an employee has to travel further than the calculated shortest journey, there is an override miles field and reason for you to check.

To reject a claim, choose the Authorisation status Not authorised, provide a reason and SAVE. The employee will receive an email to confirm the claim has been rejected and will need to take the appropriate action which is covered off in the claimants guide.

Please ensure you log into iTrent on a regular basis, i.e. daily or weekly as you will need to authorise claims on a regular basis and not once a month as with the previous system, Envoy expense.

The new Paid mileage functionality in iTrent enables users to claim daily and submit for authorising on a daily basis and it is recommended that authorisers, where possible, authorise on a regular basis to ensure the mileage is reimbursed in the following month's pay.

Authorising in iTrent is achieved by using a workflow group for the team (sub section) and where possible, there are two authorisers per team to ensure there is adequate back up should one authoriser not be available.

Authorising managers can redirect tasks in iTrent during periods of annual leave but having two authorisers per team (sub section) will ensure no authorising is missed, even if tasks are not redirected.

Please note: all authorisers within the team (sub section) receive the same tasks, but as the tasks are authorised by the manager, they disappear from the page of the other authoriser /

s. If you are aware that a manager is on leave, the other manager (this may be a chief officer) in the group will need to take responsibility and authorise the paid mileage to ensure the staff receive the reimbursement in a timely manner, in the next available pay.

Unlike the Envoy expense system, there is no provision to submit a monthly claim for authorising at the end of the period. The claims are daily and will be submitted by staff during the course of the month and should be authorised in the same manner.

If you reject one daily claim, it will have no bearing on the other claims for that month as the claims are individual.

Authorising claims for Payment:

Please authorise on a regular basis, daily if possible but try not to leave it longer than a week. If this has not taken place, please ensure that all authorising takes place by the last working day of the month, and this will ensure your staff receive reimbursement in the following month's pay.

There is no set deadline as with Envoy expense but, as mentioned several times in the guide, authorising on a regular basis will ensure your staff receive mileage reimbursement the following month, i.e., claims authorised for journeys undertaken in February, up to the last working day, will be reimbursed in March's pay.