

GP Trainee e-Expenses User Guide

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Logging In

Logging in to the website

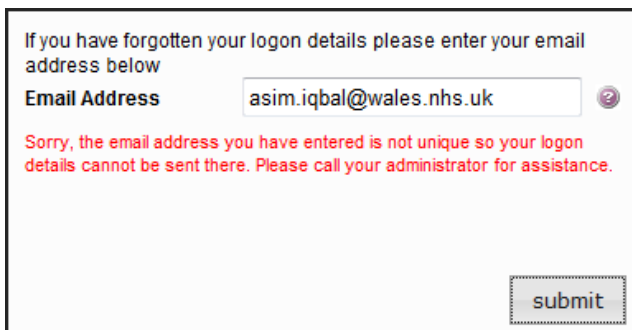
Website Address: www.sel-expenses.com

Company ID: NHSWales120
Username: Your Employee Number
Password: As per the initial set up

Setting up a password

1. Click on the “Forgotten Details” option on the homepage, enter your email address and click “Submit”. Follow the instructions in the email that follows to set up your password and log in.

N.B If you are in receipt of the following message please contact the Help & Support Team and they will generate the password reset email for you.



If you have forgotten your logon details please enter your email address below

Email Address

Sorry, the email address you have entered is not unique so your logon details cannot be sent there. Please call your administrator for assistance.

submit

Register

We have disabled this feature on the homepage and the Help & Support Team must be contacted directly for an account to be set up.

Checking & Amending Your Details

The details we are holding on your e-Expenses account have automatically been transferred from your ESR record. If your details are incorrect on e-Expenses then you can inform us and your ESR record will also be updated by the Help & Support Team.

How to view your details

1. On the homepage navigate to *My Details > Change My Details* to view your account information.

How to change your details


1. Raise a support ticket (details below) to amend your home address and work address.

If you recently changed departments and have a new approver for your expense claims, you will also need to raise a ticket to notify us.


How to update your vehicle details

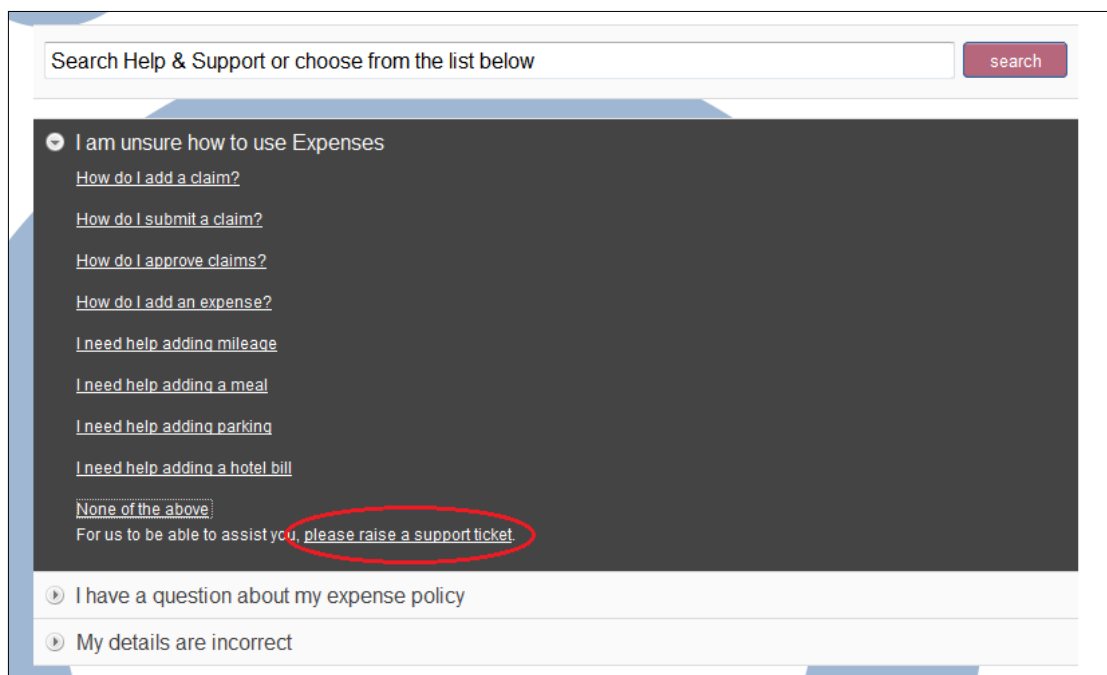
1. If the vehicle details are incorrect then navigate to *My Details > Add Vehicle*. The vehicle will need to be activated by the Help & Support Team before you can input your expense items but this will be done automatically within one working day.

How to change your password

1. You can click on the  icon on the sidebar on any page to change the password.

How to raise a support ticket

1. Click on  icon on the left sidebar.
2. Click on any of the categories to expand the section.
3. Click on “None of the above” and you will see the option to raise the ticket:



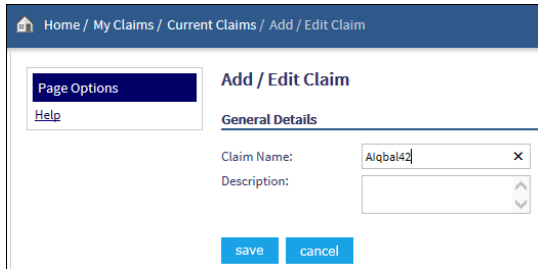
4. Enter a subject and description of the query or change of details. The option to add an attachment is also available.

Adding Expenses

Please note: All journeys MUST start at your home or current place of work.

How to create a claim

1. When you login for the first time you will need to create a claim in which your monthly expenses will be saved. On the homepage click on “Add New Expenses” and the following screen will appear.



The system will automatically generate a Claim Name when a new claim is being created and the Description field is optional. **Click Save.**

After you submit a claim you will need to create a new one for the following month by repeating this process.

How to add expenses

1. On the “Add/Edit Expense” page:

The screenshot below shows a completed expense for a Business Mileage journey from UHW, Cardiff to Morrision Hospital, Swansea. Please read on for step by step details.

Please note: If you are unsure which expense items you need to use or what you are entitled to claim for, please read the ‘What Mileage Can I Claim For’ section further on in this guide (page 8).

Page Options

[Clear General Details](#)

[Help](#)

My Expense Items

Select an item below to add it to your expense sheet:

- GP Home to HQ Mile.
- Heavy and Bulky Eq..
- Medical Business Mil.
- Medical Indemnity I..
- On Call Home to Bas.
- Parking (Non Study)
- Pedal Cycle Miles
- Public Transport Fare
- Road Tolls
- Study - 24 Hour Meal.
- Study - Accommoda.
- Study - Course Fees
- Study - Lunch Allow..
- Study - Mileage
- Study - Non Comme.
- Study - Over 10 Hour.
- Study - Parking
- Study - Public Trans.
- Study - Road Tolls
- VTS Mileage

Add Expense

General Details

Date: ? Claim: ?

Reason: ?

Other Details: ?

Medical Business Mileage

+ [Add new vehicle](#)

	From	To	Distance	Details	Passengers	Heavy/Bulky Equipment
1	UHW, University Hospital of W	Morrision Hospital, Heol Maes	43.05	43.05	<input type="text"/>	<input type="checkbox"/> X
2	Morrision Hospital, Heol Maes	UHW, University Hospital of W	43.16	43.16	<input type="text"/>	<input type="checkbox"/> X
3	<input type="text" value="from"/>	<input type="text" value="to"/>	<input type="text" value="miles"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> X

[Return to start address](#)

[View the recommended route and directions on a map](#)

[Home to office deduction rules apply](#)

Names of Passengers and Job Titles:* ?

e-Expenses GP Trainee Guide

2. Enter the date that the expense was incurred into the Date field or select it from the calendar.
3. Select a reason from the list.
4. Select a mileage item from the list on the left side of the page by ticking the box. You can select multiple items, e.g. if you are claiming mileage and parking then both boxes can be ticked as long they relate to the date you have input in Step 2.
5. Click into the "From" field and enter your starting location. This will be your current place of work or your home address and you can select the relevant icon to populate the address for you.

You can also input the following depending on the type of address you are looking for:

- Post codes: This will display all addresses attached to that postcode with Royal Mail.
- Street Name: This will display all addresses under that name in the UK and you can continue to narrow the search results by typing in the city/town.
- House number and street name: As above.
- Business Names: You can search for any registered businesses and this will include all health related addresses such as hospitals and surgeries.

6. Once you have completed a journey step, i.e. entered a location in the "From" and "To" fields, the mileage will be automatically calculated based on the fastest route.

Please note: You can enter as many journeys steps as required that relate to the date you have entered in Step 2. If you have expenses for a different date then do not enter them here and continue to follow these instructions until Step 10.

7. For items where a monetary amount is to be reimbursed, e.g. Parking, Course Fees, Medical Indemnity Insurance, input the amount as indicated below.

For these items you will be required to upload receipts and instructions for this are on Page 6

8. **Click Save.**


9. On the “Claim Details” page you will see a summary of the expense items that you have saved:

The screenshot shows a web interface for 'Claim Details'. At the top, there is a navigation bar with 'Home / My Claims / Current Claims'. On the left, there is a sidebar with 'Page Options' including 'New Expense', 'Claim List', 'Change View', 'Print', and 'Submit Claim'. The main content area is titled 'Claim: Alqbal30' and 'Claim Details'. Under 'General Information', it lists 'Claim Name: Alqbal30', 'Claim Total: £45.78', 'Claim Description', and 'Number of Items: 2', 'Amount Payable: £45.78'. Below this is a table of 'Expense Items' with columns for 'Date of Expense', 'Expense Item', 'Reason', 'Other Details', 'Number of Miles', and 'Amount Payable'.


Date of Expense	Expense Item	Reason	Other Details	Number of Miles ▲	Amount Payable
03/07/2017	Parking (Non Study)	Official Duties			£5.00
03/07/2017	Medical Business Mileage	Official Duties		86.21	£40.78
				86.21	£45.78

10. Select “New Expense” under “Page Options” to enter expenses for a new date and repeat from Step 2.


How to copy and paste an expense item

1. On the “Claim Details” page click on the  icon on the same row as the item you want to copy. This will open the “Copy Item” page and allow you to change the date of the item whilst keeping the rest of the information the same. This is ideal for repeat journeys/expenses.


How to edit an expense item

2. On the “Claim Details” page click on the  icon on the same row as the relevant item. If the incorrect expense item was used then you can select the correct one from the list box on the “Add/Edit Expense” page.

How to delete an expense item



1. On the “Claim Details” page click on the  icon on the same row as the relevant item to delete the single expense item. You will receive a prompt so that the item is not accidentally deleted.

How to view the journey steps on a mileage item

On the “Claim Details” page click on the  icon on the same row as the relevant item to produce a pop-up that will details the journey for that date. There is a close button you can click on once you have finished.

How to upload a receipt on the website

If you do not have the facility to upload, the paper receipt can be submitted to your manager but clarify this with them first. The Expenses Department no longer require receipts to be submitted to them.

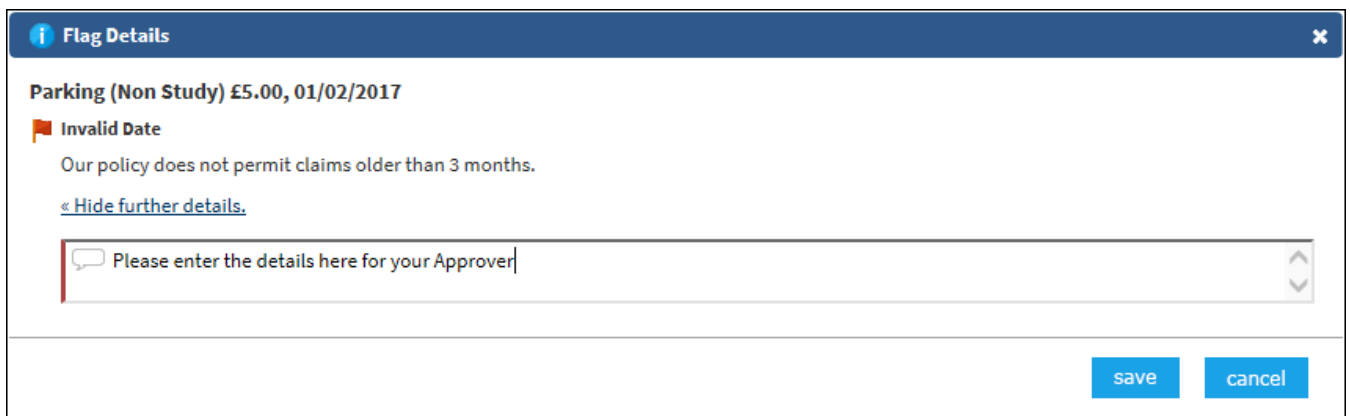
1. On the “Claim Details” page click on the  icon on the same row as the relevant item.
2. On the “Manage Receipts” page click on the expense item that you want to upload the receipt to.
3. Browse and select the file that requires uploading. This can be an image file, a PDF document, Word, Excel etc.
4. Once you have selected the file it will be uploaded automatically. Click ‘Save’ on the page.
5. On the “Claim Details” page the icon will now change to  and you can click on this to view the receipt.

Flags and Limits

Some expense items will be flagged on your claim that will require additional detail before you are able to proceed:


- If the expense item is over 3 months old at the point of entry or submission.
- If the set limits for subsistence, e.g. accommodation or meal allowances, have been breached.

The pop up box below will appear automatically when you save an expense that is flagged. Complete the further details and click Save.



Flag Details

Parking (Non Study) £5.00, 01/02/2017

 **Invalid Date**

Our policy does not permit claims older than 3 months.

[< Hide further details.](#)

Please enter the details here for your Approver

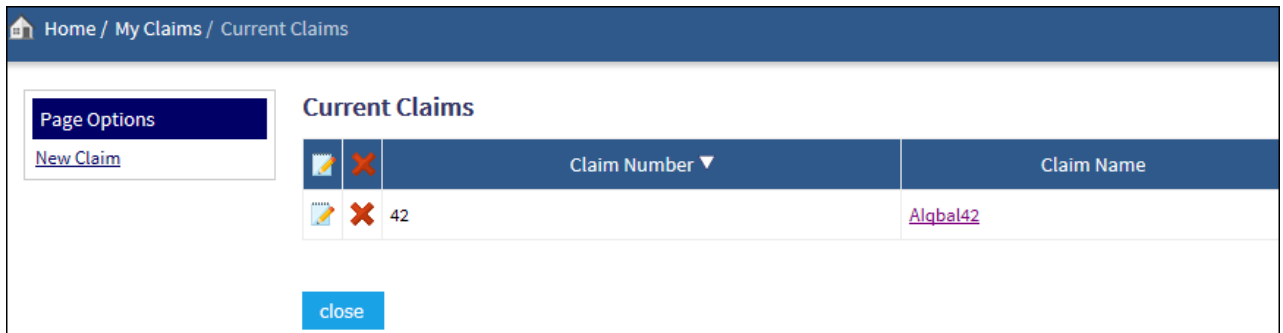
save cancel

Submitting Claims

We recommend one claim to be submitted per month (or two if you have a study leave claim as well), containing expense items from the first to the last day of the calendar month. Claims will need to be submitted by your last working day of the month.

How to access the claim from the homepage

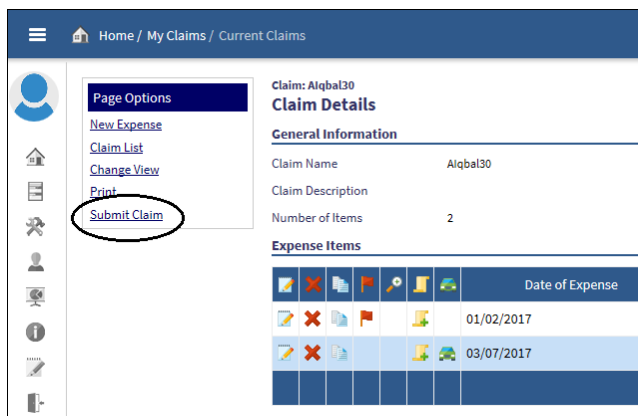
1. Click on *My Claims > Current Claims* and ensure you click on actual claim name (Alqbal42 in the example):



How to submit the claim

1. On the Claim Details page select “Submit Claim” under the Page Options on the left side of the page.

Please note: If you have any flagged expense items then you may be asked to provide further detail if this has not already been provided.



2. Read the declaration and click “I Accept”.
3. The Claim Details page will now be updated with a Claim History section and the approver will receive an email asking them to approve the claim.

How to unsubmit the claim

1. On the Claim Details page click on the “Unsubmit Claim” option. This can only be used if the approval has not begun the approval process, otherwise a message will appear to prevent you from doing so.

Warning: There is no warning message when you attempt to unsubmit the claim so please take care not to click this by mistake.

What Mileage Can I Claim?

GP Trainees who are based in Hospitals or GP Practices are entitled to claim different types of mileage and these have been detailed below.

All GP Trainees are required to apply for study leave on Intrepid prior to claiming the expenses for them.

Important: You must ensure that all study related expense items are in a separate claim to non-study item to ensure there are no delays to the approval of your claim. You can submit multiple claims per month.

Excess Travel

All GP Trainees will be entitled to claim Excess Travel if their current place of work is further than their Base Hospital. The All Wales Relocation policy states in section 6.7:

“New employees who cannot find suitable accommodation or do not opt to move in the course of their rotation and who would otherwise be eligible for the reimbursement of relocation costs may be reimbursed their extra daily travelling expenses up to the maximum allowance...

Under paragraph 315 of the Terms and Conditions of Service a rotational postholder can choose not to move on taking up their second or subsequent posts in the rotation.

Excess travel will be calculated as home to new hospital mileage minus home to base hospital mileage.”

If you wish to claim Excess Travel you will need to apply for a separate expenses account and the application form can be found here:

<http://www.wales.nhs.uk/sitesplus/955/page/85349>

GP Trainees based in a Hospital

Expense Item	What Journeys Can I Claim?
Medical Business Mileage	You can use this item to claim all journeys with the following exceptions: <ul style="list-style-type: none">- Home to Current Place of Work (and vice versa)- Journeys to VTS locations- Journeys for On Calls/Out of Hours work- Journeys to undertake courses or exams
On Call Home to Base	You are entitled to claim the journeys for On Calls/Out of Hours work
VTS Mileage	You are entitled to claim the full distance to your VTS location, even if you travel directly to or from your home address. This must only be used for journeys to and from your VTS location.

GP Trainees based in a Practice

There may be instances where you undertake house visits and are required to travel to a VTS location. Some examples have been provided further below on what you are entitled to claim.

Expense Item	What Journeys Can I Claim?
Medical Business Mileage	You can use this item to claim all journeys with the following exceptions: - Home to current place of work (and vice versa) - Journeys to VTS locations - Journeys for On Calls/Out of Hours work - Journeys to undertake courses or exams
GP Home to HQ	You can claim your Home to Practice distance up to a maximum of 10 miles per single journey (20 miles return). This can only be claimed on days you undertake an official journey, i.e. house visit or VTS Please note: You can only claim Excess Travel or GP Home to HQ. You will need to choose one option depending on which is financially beneficial and you can contact the Expenses Team who can help determine this for you.
On Call Home to Base	You are entitled to claim the journeys for On Calls/Out of Hours work
VTS Mileage	You are entitled to claim the full distance to your VTS location, even if you travel directly to or from your home address. This must only be used for journeys to and from your VTS location.

Example 1 – House visit & VTS journey

Home > Practice > House Visit > Practice > VTS Location > Home

Expense Item	Entry
GP Home to HQ	Input your Home to Practice distance (maximum of 10 miles)
Medical Business Mileage	Input: Practice > House Visit > Practice
VTS Mileage	Input: Practice > VTS Location > Home

Example 2 – Branch practice & house visit

Home > Branch Practice > House Visit > Branch Practice > Home

Expense Item	Entry
Medical Business Mileage	Input: Home > Branch Practice > House Visit > Branch Practice > Home

How to Claim GP Home to HQ Mileage

1. I have started and finished my journeys at my current place of work.

Claim your home to current place of work (return) distance using the “GP Home to HQ” expense item (up to a maximum of 10 miles per single journey).


2. I have travelled from home directly to a location other than my current place of work (or I have travelled from a location directly to my home)

- I. Input your journeys using “Medical Business Mileage” and click Save.

E.g. Bridge Street is the house visit

	From	To	Distance Details	
1	home	20 Bridge Street, Newport, NP	11.48	11.48
2	20 Bridge Street, Newport, NP	Beechwood Surgery	2.00	2.00

When you travel to a location en-route to your home or current place of work, the system will automatically enforce the “lesser of” rule to your mileage calculation in line with Section 280.a in the Medical & Dental T&Cs

- II. Click on the  icon on the Claim Details page to view the journey steps after you have saved the Medical Business Mileage expense.

In the example below the Reimbursable Distance for the first journey step has been automatically reduced as the system has calculated the distance from Beechwood Surgery to 20 Bridge Street (1.91 miles) as being lower than Home to 20 Bridge Street (11.48 miles)

Start Address	End Address	Number Miles	Recommended Distance	Reimbursable Distance
Home	20 Bridge Street, Newport, NP20 4AN	11.48	11.48	1.91
20 Bridge Street, Newport, NP20 4AN	Beechwood Surgery, Newport, NP19 8HL	2.00	2.00	2.00

- III. Below is a breakdown of the journey steps to determine the entitlement of Home to HQ miles:

Journey Step	Expense Item	Miles Travelled	Miles Reimbursed	Notes
Home to 20 Bridge Street	Medical Business Mileage	11.48	1.91	Business Miles Travelled <i>minus</i> Business Miles Reimbursed = GP Home to HQ Miles
	GP Home to HQ		9.57	
20 Bridge Street to Practice	Medical Business Mileage	2.00	2.00	
Practice to Home	GP Home to HQ	13.78	10.00	Capped at 10 miles