



myHR User Guide

Employee Guidance

Version 3.0
Date: October2023

Document Control

Issue	Published	Software version	Comments
1.0	November 2021	10.41	
2.0	February 2022	10.42	ESS updated and introduction of Special Leave
3.0	October 2023	10.46.01	Update password reset process to link into MFA security

Table of contents

<u>Introduction</u>	3
1. <u>Logging in to myHR</u>	4
2. <u>Home Page Overview</u>	4
3. <u>Navigation Features</u>	6
4. <u>Utility Menu</u>	7
4.1 <u>My Profile</u>	7
4.2 <u>Change your Password</u>	8
4.3 <u>Useful Links</u>	8
4.4 <u>Settings</u>	8
4.5 <u>Preferences</u>	8
4.6 <u>Dark Mode</u>	9
4.7 <u>Logging Out</u>	9
5. <u>My Profile</u>	9
5.1 <u>My Personal Details</u>	9
5.2 <u>Confidential Information – Sensitive Information</u>	10
5.3 <u>Contact Information</u>	11
5.4 <u>Friends & Family – Emergency Contacts</u>	11
5.5 <u>Bank Details</u>	12
5.6 <u>Private Vehicles</u>	12
6. <u>My Employment</u>	13
7. <u>Talent currently not available</u>	14
8. <u>Home – Dashboard</u>	14
8.1 <u>Latest Company News</u>	14
8.2 <u>Summary Cards – Other Absence</u>	14
9. <u>My Time</u>	15
9.1 <u>Other Absence (Special Leave)</u>	16
9.2 <u>Creating a New Other Absence</u>	16
10. <u>My Pay</u>	17
10.1 <u>Payslips & P60s</u>	17
11. <u>Benefits – currently not available</u>	18
12. <u>Time and Expenses</u>	18
12.1 <u>Making a Claim</u>	19
12.2 <u>Attaching Receipts</u>	23
12.3 <u>Submitting a Claim</u>	24
12.4 <u>Attaching a Receipt to a Submitted Claim</u>	25
12.5 <u>Cancelling a Claim</u>	27
12.6 <u>Resubmitting a Rejected Claim</u>	28
13. <u>Excess Travel Expenses</u>	29
13.1 <u>Making a Claim</u>	30
14. <u>Resetting your Password</u>	31

Introduction

Welcome to myHR the East Lothian Council employee self-service portal.

myHR is a secure web-based application that provides you with the opportunity to:

- Access your online payslips and P60s.
- View and amend your personal details such as your address and contact information.
- View and amend your bank account details.
- View your current employment details and your working pattern/s.
- Allows you to submit time and expense claims and Special Leave applications.

If you have any queries regarding the accuracy of the personal or employment information held about you, please email HR at hr@eastlothian.gov.uk In the email please include your name, employee number and the nature of your query.

Password Security

The system holds personal and confidential information and for that reason, all passwords must be secure. You should not share your password with anyone, and you should always log out of your account when you have finished.

Data Protection

The data contained in the system and its usage is subject to relevant legislation and East Lothian Council's Data Protection Policy and Procedure as well as the EU General Data Protection Regulation (GDPR).

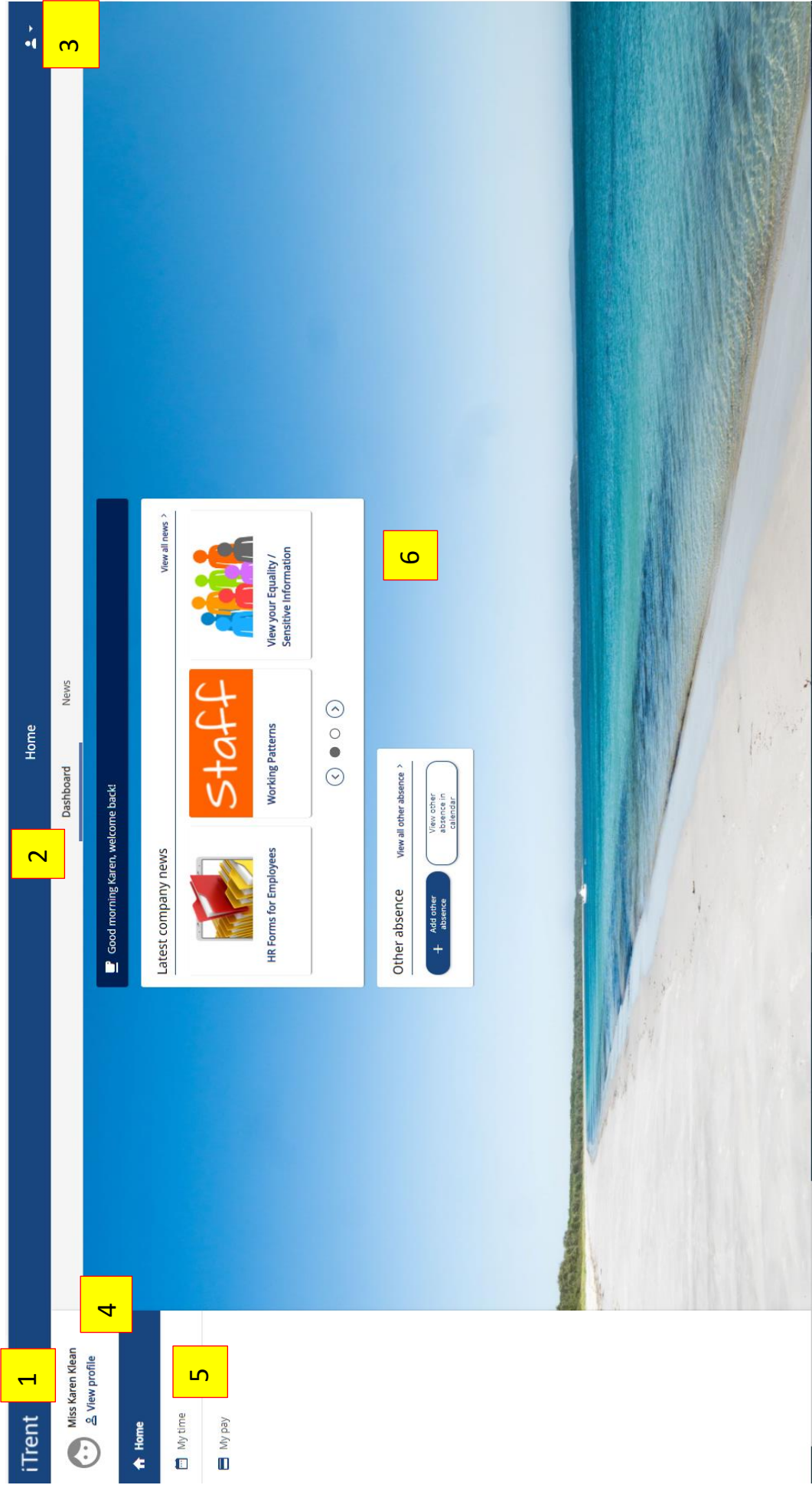
1. Logging in to myHR

- If your **ELC log-in** details are linked to your account, use this **Web link:**
https://ce0372li.webitrent.com/ce0372li_ess
- If you use your **personal email address** to access your account, use this **Web Link:**
https://ce0372li.webitrent.com/ce0372li_iss

2. Home Page Overview

When you first log in to myHR you will see the Home Page. The Home Page is made up of the following sections:

Name	Detail
1. Logo	When you click on the 'iTrent Logo' you will go back to the Home Page.
2. Section name	The section names My profile, Home, My time and the My pay headers connects you to the area you have navigated to.
3. Utility menu	When opened will show useful links and settings.
4. My Profile	Clicking on the 'View profile' link will take you to the 'My profile' page.
5. Navigation	Shows the items you can access. When accessing myHR via your phone these items will be shown at the bottom of the screen.
6. Content area	Displays the data within the section being viewed by you.



3. Navigation Features

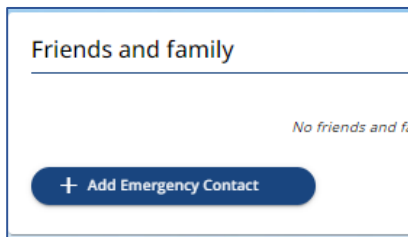
Navigation options: Action buttons, links and backlinks

Depending on the area you are in the content area may contain action buttons, links and backlinks to view information.

➤ Action buttons

When you select an action button e.g. **+ Add Emergency Contact**. A new page will open and will allow you to enter the information.

Please remember to click 'Save' when you make any changes.



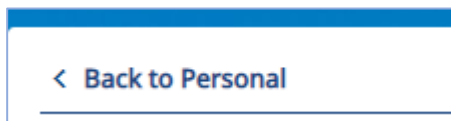
➤ View buttons / links

When you click on a button or link e.g. **'View other absence in calendar'** you will be taken to a new page.



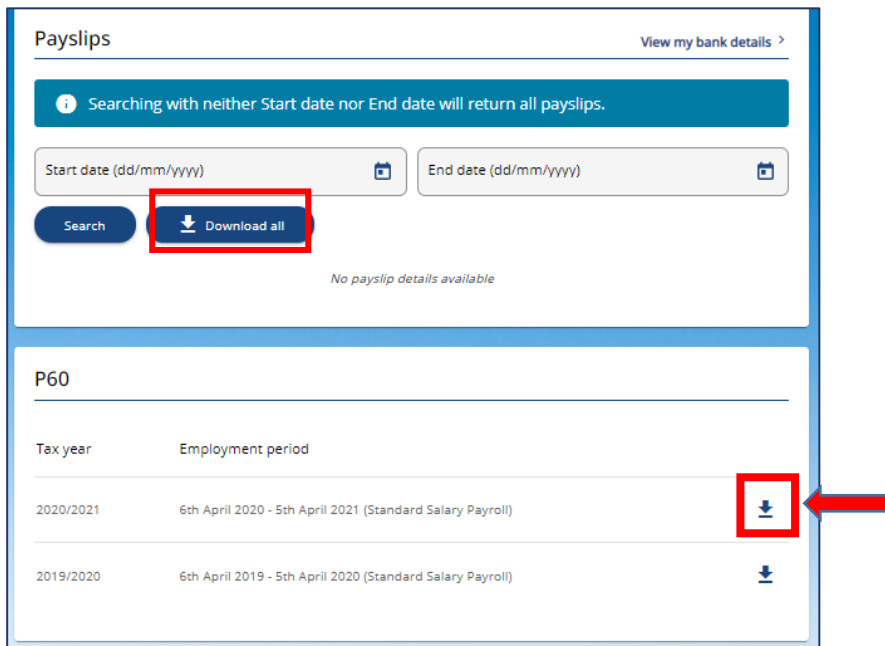
➤ Backlinks

When the page contains a backlink you will see it in the top left corner of the screen. Clicking this link will take you back to the previous page.




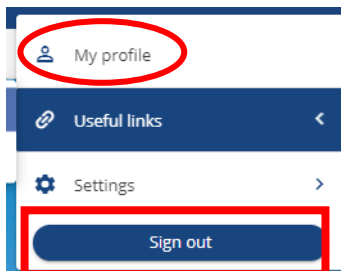
➤ Downloads

You can download your P60s and payslips. Select the document you want to download. **Click** on the **'download'** button. You'll see a spinning wheel which shows the process is running and once completed the file will be available in your download folder.



4. Utility Menu

The **'Utility menu'** can be accessed by clicking on this icon  Which you will find in the top right-hand corner of the screen.



The menu contains quick links to the **'My profile'**, **'Useful links'** and the **'Settings'** sub menu. To log out of your myHR account you come here and **click 'Sign out'**.

4.1 My Profile

Clicking on this link will take you to the **'My profile > Personal'** page.

4.2 Change your Password

Click on **'Change password'**, a new page will appear. Enter your current password and then enter and confirm your new password, **click 'Save'**.

Please note: the format for passwords.

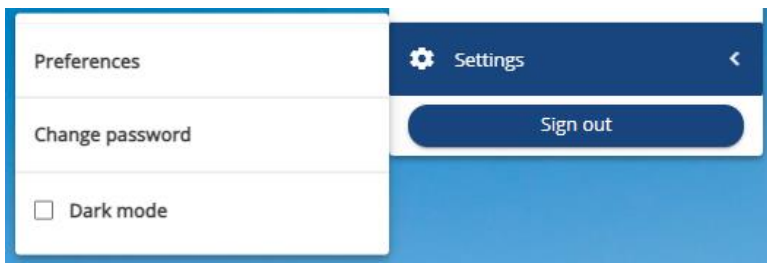
4.3 Useful links

When you hover over the **'Useful links'**, a sub menu of links will appear.



4.4 Settings

When you hover over the **'Settings'** link, a sub menu of options will appear.



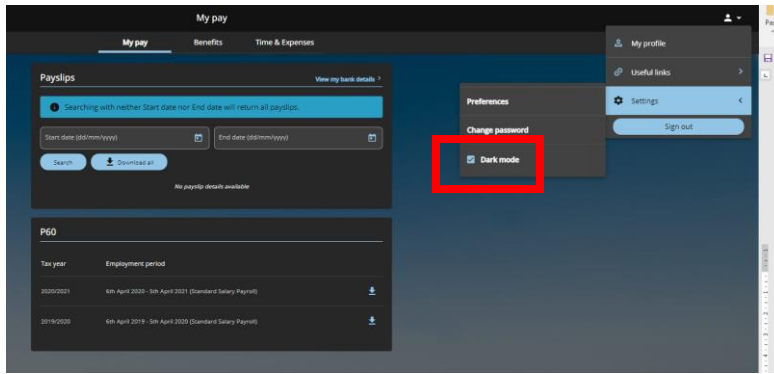
4.5 Preferences

To change the date or language format preference when logging in to myHR click on **'Preferences'** a new page will appear. Make the required changes and then click **'Save'**.


A change will not take effect until you log out and then log back in to myHR.

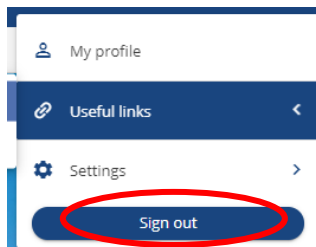
4.6 Dark Mode

When you tick the checkbox against **'Dark mode'**. Your myHR will change to show a light on dark mode.



4.7 Logging Out

Click on this icon  (which you will find in the top right-hand corner of the screen). This will open the 'Utility menu'. To log out of your myHR account **click** on the 'Sign out' button.



5. My Profile

The profile area is split into 3 sub areas tabs: 'Personal', 'Employment' and 'Talent'.

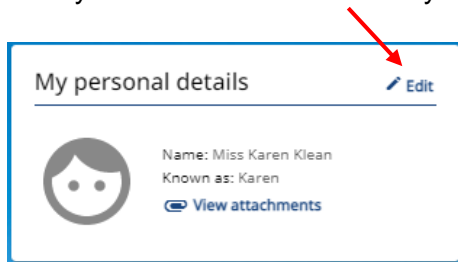
When you make a change to any of your details remember to click save.

Card Name	Details
My personal details	<p>This displays your details. Such as name, date of birth, organisation start and Reckonable (Continuous) service date.</p> <p>Buttons available: Change your name details.</p> <p>Please note: when you see a 'Greyed out' field then you cannot make any changes and only have read access.</p>
Confidential information	<p>Displays your 'Sensitive information' which you can update.</p>
Contact Information	<p>This shows your contact information. Should you need to make any changes, then using the available buttons go and edit the required areas.</p> <p>Buttons available: + Add Address + Add Contact Details</p>

Friends and family	Lists all your emergency contacts. Using the available button, allows you to edit the information. Button available: + Add Emergency Contact
Bank details	You will see the headings Account name, Bank name and Sort code and your details will be shown below these headings. When you hover over any of your details they will turn into hyperlinks. Clicking on anyone will open your bank details into full view, which will allow you to update.
Private Vehicles	If you have a vehicle linked to your account you will see its details. Clicking on any of your cards details will open into a new screen and show your car details in full view. Please note: you cannot change any details of your vehicle. If you have any queries, then please email the HR Systems Team hrpayrollsystem@eastlothian.gov.uk

5.1 My Personal Details

When you **click** on the **'Edit'** link you will be taken to a new screen.

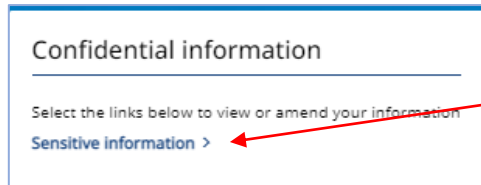


Fields highlighted with a **red *** are mandatory and must be completed.

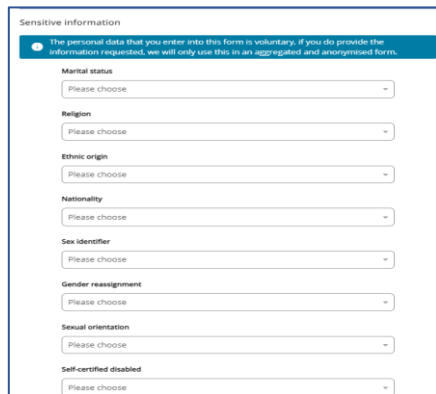
Any changes you make please ensure you click the **'SAVE'** button. Or, press **cancel** to leave the page without making changes.

'Greyed' out fields cannot be changed.

5.2 Confidential Information (Sensitive information)

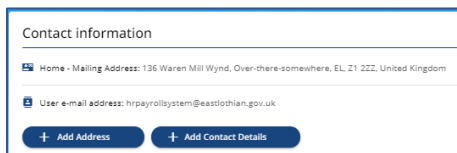


When you **click** on the '**Sensitive information**' link a new screen will open.



When you complete and/or update any fields in this form **click** the '**SAVE**' button at the bottom of the form before exiting.

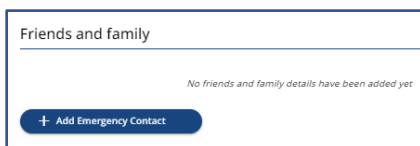
5.3 Contact Information



You will see your current address and contact information are displayed.

- To view your address simply **click** on any part of the address. This will take you to a new screen that will show your address in full view.
- To update your address, **click** the '**+ Add Address**' button and enter your new address. Then **click** '**SAVE**'.
- To view your contact details, **click** on the contact details. A hyperlink will take you to a new screen that will show your contact details in full.
- From this screen you can make changes, **click** '**SAVE**' before leaving the page.
- If you want to add additional contact details, click '**+ Add Contact Details**' and using the drop-down field select the type of contact then enter the details and **click** '**SAVE**'.

5.4 Friends and Family (Emergency contacts)



To view your emergency contacts details, **click** on their details. A hyperlink will take you to a new screen that will show you their details in full.

If you want to add a new contact, **click** '**+ Add Emergency Contact**'. You will now see the Emergency contact form you can complete.

Fields highlighted with a **red *** are mandatory and must be completed.

Any changes you make please ensure you click the **'SAVE'** button. Or, press **cancel** to leave the page without making changes.

5.5 Bank Details

Bank details		
Account name	Bank name	Sort code

Your bank details will be displayed. **Click** on any of your bank details which are hyperlinks, and you will be taken to a new screen.

Any changes you make to your bank account will take immediate effect. The sort code will be validated using a list held within the Payroll system.

When entering a sort code and **an error message appears telling you that an 'Invalid sort code has been entered'**.

This usually means the sort code has never been used before so just requires the Employment & Rewards Team to add the new sort code to the system list. To contact the team email payrollforms@eastlothian.gov.uk giving your employee number, name and the sort code.

PLEASE NOTE: if you change your bank account details near to a pay date the payment may have already been processed and sent to your **old account**.

5.6 Private Vehicles

Private vehicles				
Vehicle registration	Make	Model	Driver start date	Driver end date
KAZZ KLN	BMW	320D Sport	01 Aug 2021	

You will see any vehicle/s that have been attached to your myHR account following **Driver and Vehicle Information Solutions (DAVIS)** clearance. To find out more about **DAVIS** click [HERE](#)

To see your vehicle details in full click on any of your vehicle details and you will be taken to a new screen,

Please note: you **cannot** change any details about your vehicle. If you wish to speak to someone about your car then email your query to hrpayrollsystem@eastlothian.gov.uk

6. My Employment

This table will show all cards available to the **'My profile => Employment'** page, what each card contains, and the available buttons.

Period of employment	Position	Department
01 Jun 2019 - present	Senior Business Support Assistant - Test	Support Unit - Test

You will see a table showing your current post/s you have within the Council. To see a position in more detail simply click on any part of the position details, they are hyperlinks so will take you to a new page that will show you your chosen job in more detail.

All fields in the form are **'Greyed out'** so you have **'read only'** access.

If you have any questions, in the first instance contact your Line Manager. Or email Human Resources at hr@eastlothian.gov.uk

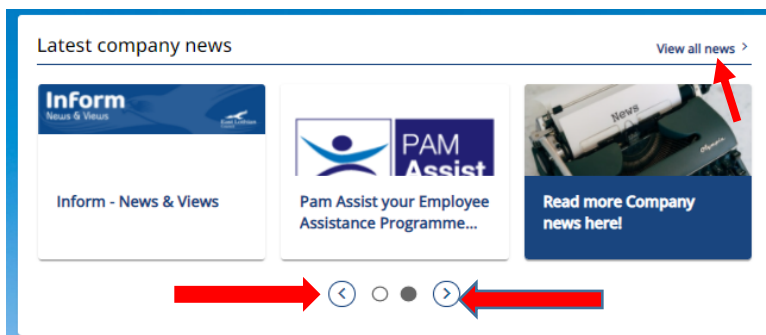
7. Talent

This option is currently not available.

8. Home – Dashboard

8.1 Latest Company News

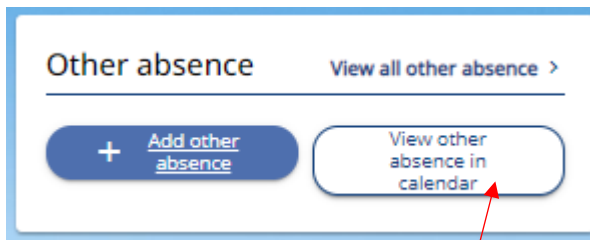
At the top of the **'Home => Dashboard'** page, you will see **'Latest company news'**. Clicking on the arrows or page controls below the news items will move you to the next article.



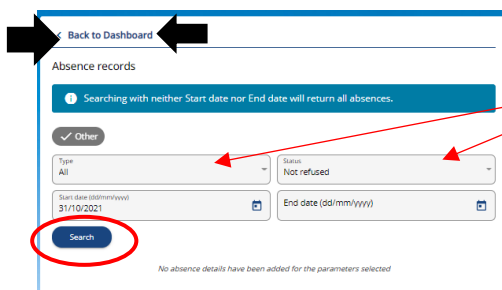
Clicking on the **'View all news'** link in the top left-hand corner of the **'Latest company news'** will display all available company news items.

8.2 Summary Card/s

This card contains a quick link button to view **'Other absence'** details.



When you **click** on the **'View other absence in calendar'** button a new screen will appear.



When in this screen you can create your search criteria just by clicking on the dropdown option arrows, or by changing the date fields.

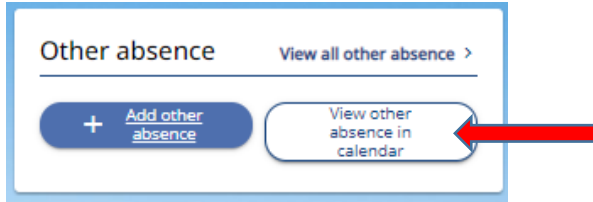
Click 'Search'

The system will return all absences that match your search criteria.

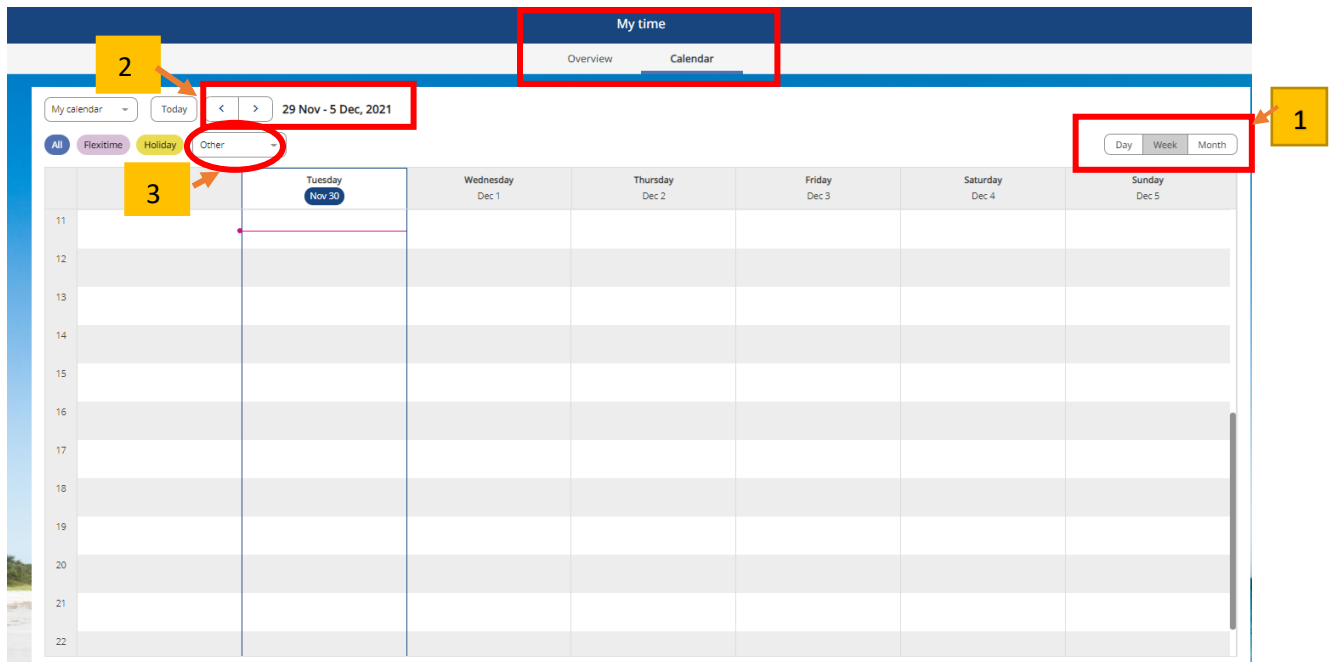
To go back to the **'Dashboard'** click on the **'Back to Dashboard'** link found in the top left-hand corner.

9. My Time

When you **click** on 'View other absence in calendar' you will be taken to 'My time' => 'Calendar'.

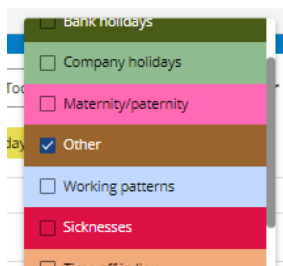


The system defaults to the current day. However, you can search by day, week or by month using the option buttons in the top right hand corner of the calendar.



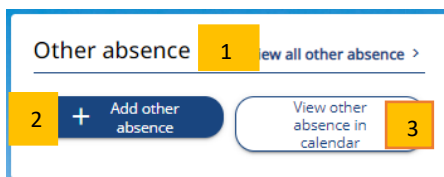
Navigating around the calendar

1. You can search by day, week or by month.
2. Using the search arrows you can go back a day, week or view an entire month. All you need to do is choose how you want to view the information. The example above shows us searching by 'week'.
3. Click on 'Other', a dropdown box will appear with a list of absence types to choose from. Tick the box/es you want to search by.



9.1 Other Absences - Special Leave

To view or submit a Special Leave request go to **'My time => Other absence'** or click on the **'Other absence'** summary card on the Home Page.



1. To view previous special leave absences, **click on 'View all other absence'** complete the search criteria and then click **'Search'**.
2. To create a new special leave request, click on **'+ Add other absence'**.
3. To view previous special leave periods, click on **'View other absence in calendar'**.

9.2 Creating a New Other Absence (Special Leave) Request

To start a new request, click on **'+ Add other absence'**. The 'Other absence details' form will open. All fields of the form are **mandatory** and must be completed.



Before submitting your request, please ensure you have read the [Special Leave Policy](#) and that your request complies with the policy.

Navigating around the 'Other absence details' form

All fields in this form are mandatory and must be completed.

When finished **click 'SAVE'**. The form will close and your request will be sent to your Line Manager.

1. **Absence type** – select the section of the Special Leave Policy/Adverse Weather Policy you are making your request under.
2. **Absence reason** – the list is dynamic and based on the option selected in **Absence type**.
3. **Absence period** – select either **Part day**, **Full day** or **More than one day**. You must complete the additional fields that appear to confirm the date/s & time/s of your request. All time/s must be completed using the 24 hour clock (e.g 1pm = 13:00hr).
4. **Notes** – enter as much detail as possible about your request. Your manager will need this information when reviewing your request.

When you submit your request, you will receive an email confirming your request has gone to your Line Manager. Your Line Manager will receive an email telling them to review your request.

Once your manager has reviewed your request, you will receive an email telling you if your request has been authorised or not.

10 My Pay

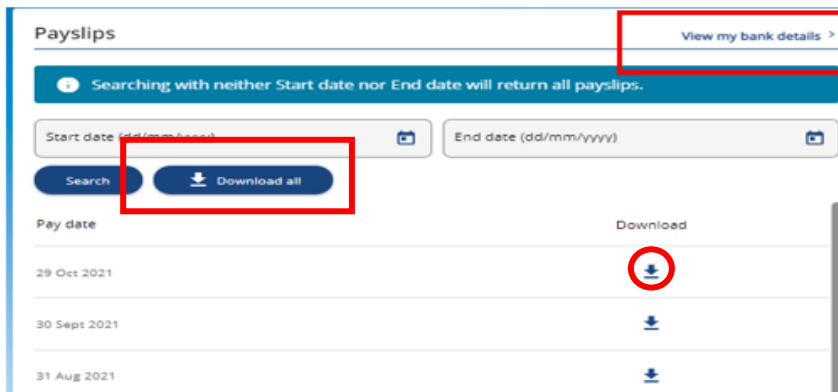
The table below shows the cards available to the 'My pay => My pay' page. The table details what each card contains, as well as available action buttons.

Card name	Details
Payslips	<p>You will see a list of all your payslips. There is also a search function available which will allow you to search between a specific pay period to find the payslips that fall into your search request.</p> <p>Once selected a payslip can be viewed and/or downloaded.</p> <p><u>Buttons available:</u></p> <p>View my bank details Download all Download</p>
P60	<p>Your P60s will be in date order. To download, select the row or the download icon this will trigger the file to download onto your machine.</p> <p><u>Buttons available:</u></p> <p>Download</p>

10.1 Payslips and P60s

The 'Payslips' card will list all your payslip/s in date order from the newest to the oldest.

In the top right-hand corner of the card contains a quick link to your bank details. Which can be found in 'My profile => Personal' tab.



To download a specific payslip, without viewing it **click** on the 'download' icon at the end of the row. This will generate the download to your device.

You do have the option to download ALL your payslips. However, depending on how many payslips you have may take sometime.

East Lothian Council

Karen Khan
128 Waverley Wynd
Over-Rose-somewhere
E5
21 222

East Lothian Council

PRIVATE AND CONFIDENTIAL

Payable 30/11/2021

Payroll Name	Standard Salary Payroll	Tax Period	8
Employee Name	Karen Khan	Tax Code	not/na/
Reference No.	999992	N.I. Number	Y05699D
Payments		N.I. Category	Period: 30/11/2021 / 30/11/2021
Deductions		Offtime paid to	30/11/2021
		This Period	

11 Benefits

This option is currently unavailable.

12 Time & Expenses

To view or submit a claim go to **'My pay => Time & Expenses'** page.



Before you can make a claim for business mileage, your personal and vehicle details must be registered on the Driver and Vehicle Information Solutions system (DAVIS). Once your details have been approved on DAVIS. Your vehicle information will be added to your myHR profile. Only once both processes have been completed will you be able to submit a claim for business mileage.

How do I Register?

To register your vehicle on DAVIS send an email to the Transportation Team at driverlicence@eastlothian.gov.uk attaching a copy of your driving licence.

The registration process only affects employees who intend to claim for business mileage. If you claim is for 'Other Expenses' i.e. public transport tickets then there is no need for you to register your vehicle.

My pay

My pay Benefits **Time & Expenses**

Time & Expenses

✓ In progress Authorised

Start date (dd/mm/yyyy) 01/10/2021 End date (dd/mm/yyyy) 30/11/2021

Search

Claim name	Start date	Reference	Cut off date	Status
Travel and Expenses Claim	01 Nov 2021	EXP0000001584		Provisional

Summary

+ Add claim

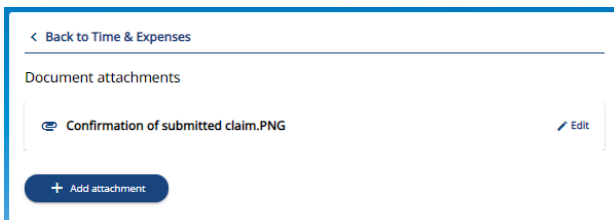
The system defaults to claims **'In progress'**. These claims can be **'Provisional'** claims which are claims that have still to be submitted to your Line Manager. Or **'In progress'** claims which are claims that you have submitted to your Line Manager for approval but have still to be authorised.

Navigating around the Time & Expense home page

1. To view **'In progress'** claims or **'Authorised'** claims tick the relevant button.
2. To search by date, **click** on the calendar icons, select the date range and then **click 'Search'**.
3. Clicking on the **'Summary'** button will show your claim in more detail.
4. Clicking on the **'Paperclip/Attachment'** icon will allow you to view and add receipts.
5. To start a new claim, **click '+ Add claim'**.

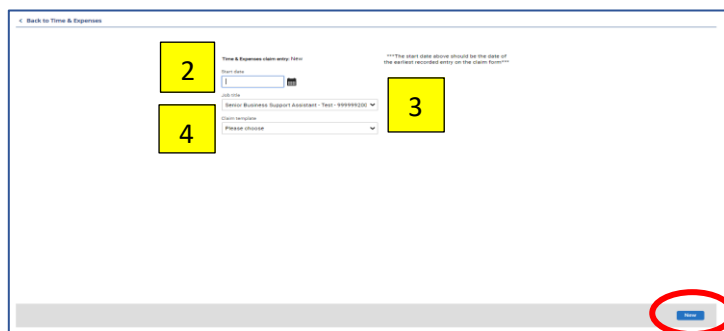
If you have submitted a claim and the status is 'Awaiting authorisation' and you need to add an additional receipt. **Click** on the **'Paperclip'** icon at the end of the claim you want to update.

A new screen will appear just click **+Add attachment** and then when finished click **Save**.



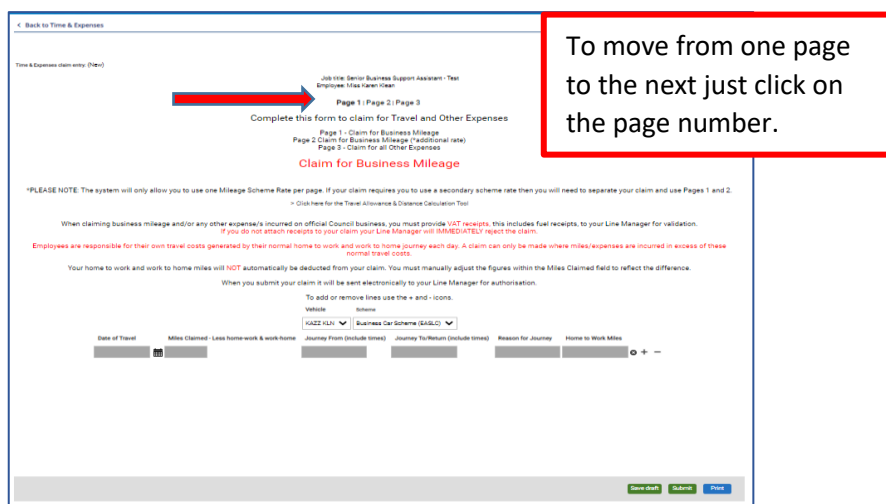
12.1 Creating a New Claim for Business Mileage or Other Expenses

1. **Click** on the **'+ Add claim' button'**. You will be taken to a new screen.
2. **Start date:** using the calendar icon select the date. The start date for your claim must be the date of the earliest recorded entry for the claim.
3. In the **'Job Title'** field if you have one position then this field will self-populate. However, if you have multiple jobs, using the dropdown arrow select the relevant job you're claiming against.
4. From the **'Claim Template'** dropdown field select the relevant template.
5. **Click** the **'New'** button.



When the Time & Expense claim form opens the form defaults to Page 1. However, the claim form has 3 pages.

- **Page 1** – claims for Business Mileage.
- **Page 2** – claims for Business Mileage (use this page when making a claim using a secondary mileage rate).
- **Page 3** – claim for all Other Expenses.



Page 1 – Claim for Business Mileage

Vehicle	This field will automatically populate unless you have more than one vehicle listed on the system. If you have multiple vehicles, you will have to select the vehicle you are claiming for. Only one vehicle can be used per claim.
Scheme	This will default to the schemes relevant to your terms & conditions. Please select the appropriate scheme for your claim. You can only use one scheme per page of your claim, but you can select a different scheme for each page of the claim. For example on page 1 you could select Public Transport Rate and on page 2 you could select the Business Car Scheme. Previously, you may have used 'Casual' or 'Essential' vehicle schemes. These schemes have been replaced by one scheme the ' Business Car Scheme '.
Date of Travel	Enter the date the journey took place using the calendar icon or enter the date manually.
Miles claimed	This is the number of miles to be paid . If travelling directly from home, then the number of miles from your home to your normal place of work must be deducted from the total. Please note: Miles claimed should be rounded down to the nearest whole mile.
Passengers *	This option is only available to Elected members. Enter the number of passengers travelling with you per journey excluding the driver (you can claim per passenger / per journey).
Journey From	Please include times as well as location when completing this field.

Journey To	Please include times as well as location/s when completing this field.																																																				
Reason for Journey	<p>You must enter the reason for your journey/s.</p> <p>1. When entering multiple journeys, you can enter the information on one line of the claim. However, you must breakdown the journeys into more detail to allow your Line Manager to review your claim (see Example 1).</p> <div data-bbox="391 380 1468 593" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Example 1</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Vehicle</th> <th colspan="2">Scheme</th> </tr> <tr> <td colspan="2">SPEEDDEM666</td> <td colspan="2">Public Transport Rate (EASLC)</td> </tr> </thead> <tbody> <tr> <td>Date of Travel</td> <td>Miles Claimed</td> <td>Journey From (include times)</td> <td>Journey To (include times)</td> <td>Reason for Journey</td> <td>Home to Work Miles</td> </tr> <tr> <td>01/10/2020</td> <td>40</td> <td>JMH 9.15am</td> <td>JMH 15.45pm</td> <td>JMH to Dunbar 12 miles, Dunbar to Tynninghame - 5 miles, Tynninghame to Inneswick - 9 miles & Inneswick to JMH 15 miles</td> <td></td> </tr> </tbody> </table> </div> <p>2. Use one line per journey (see Example 2).</p> <div data-bbox="391 660 1460 862" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Example 2</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Vehicle</th> <th colspan="2">Scheme</th> </tr> <tr> <td colspan="2">SPEEDDEM666</td> <td colspan="2">Business Car Scheme (EASLC)</td> </tr> <tr> <th>Date of Travel</th> <th>Miles Claimed</th> <th>From (include times)</th> <th>Journey To (include times)</th> <th>Reason for Journey</th> <th>Home to Work Miles</th> </tr> </thead> <tbody> <tr> <td>05/10/2020</td> <td>12</td> <td>John Muir House 9a</td> <td>Musselburgh 15.50p</td> <td>Client meetings</td> <td>2</td> </tr> <tr> <td>06/10/2020</td> <td>5</td> <td>John Muri House 13</td> <td>Penston 16.15pm</td> <td>Meeting</td> <td>2</td> </tr> <tr> <td>12/10/2020</td> <td>17</td> <td>John Muir House 9a</td> <td>N/Berwick 11.45am</td> <td>Site visits</td> <td>2</td> </tr> </tbody> </table> </div>	Vehicle		Scheme		SPEEDDEM666		Public Transport Rate (EASLC)		Date of Travel	Miles Claimed	Journey From (include times)	Journey To (include times)	Reason for Journey	Home to Work Miles	01/10/2020	40	JMH 9.15am	JMH 15.45pm	JMH to Dunbar 12 miles, Dunbar to Tynninghame - 5 miles, Tynninghame to Inneswick - 9 miles & Inneswick to JMH 15 miles		Vehicle		Scheme		SPEEDDEM666		Business Car Scheme (EASLC)		Date of Travel	Miles Claimed	From (include times)	Journey To (include times)	Reason for Journey	Home to Work Miles	05/10/2020	12	John Muir House 9a	Musselburgh 15.50p	Client meetings	2	06/10/2020	5	John Muri House 13	Penston 16.15pm	Meeting	2	12/10/2020	17	John Muir House 9a	N/Berwick 11.45am	Site visits	2
Vehicle		Scheme																																																			
SPEEDDEM666		Public Transport Rate (EASLC)																																																			
Date of Travel	Miles Claimed	Journey From (include times)	Journey To (include times)	Reason for Journey	Home to Work Miles																																																
01/10/2020	40	JMH 9.15am	JMH 15.45pm	JMH to Dunbar 12 miles, Dunbar to Tynninghame - 5 miles, Tynninghame to Inneswick - 9 miles & Inneswick to JMH 15 miles																																																	
Vehicle		Scheme																																																			
SPEEDDEM666		Business Car Scheme (EASLC)																																																			
Date of Travel	Miles Claimed	From (include times)	Journey To (include times)	Reason for Journey	Home to Work Miles																																																
05/10/2020	12	John Muir House 9a	Musselburgh 15.50p	Client meetings	2																																																
06/10/2020	5	John Muri House 13	Penston 16.15pm	Meeting	2																																																
12/10/2020	17	John Muir House 9a	N/Berwick 11.45am	Site visits	2																																																
Home to Work Miles	It is essential that if you leave from home or go back home then those miles MUST be off set from your total miles claimed for each journey.																																																				

Page 2 – Claim for Business Mileage (secondary mileage rate)

You only need to use this page if your claim requires you to use a different Mileage Scheme Rate from the one you have chosen on Page 1.

For example:


Page 1 - you have selected the 'Business Car Scheme' for all journeys within **EL region**.

Page 2 - you select 'Public Transport Rate' for all journeys **out with** EL region.

Vehicle		Scheme			
SPEEDDEM666		Business Car Scheme (EASLC)			
Date of Travel	Miles Claimed	Journey From (include times)	Journey To (include times)	Reason for Journey	Home to Work Miles
05/10/2020	12	John Muir House 9a	Musselburgh 15.50p	Client meetings	2
06/10/2020	5	John Muri House 13	Penston 16.15pm	Meeting	2
12/10/2020	17	John Muir House 9a	N/Berwick 11.45am	Site visits	2


Vehicle		Scheme			
SPEEDDEM666		Public Transport Rate (EASLC)			
Date of Travel	Miles Claimed	Journey From (include times)	Journey To (include times)	Reason for Journey	Home to Work Miles
01/10/2020	56	JMH 9.15am	Stirling 11.30am	Meeting	3

The table below provides more detail on the information required to complete this section of the claim. All **'Greyed out'** fields are mandatory and must be completed.

Vehicle	This field will be automatically populated unless you have more than one vehicle listed on the system. If you have multiple vehicles, you will have to <u>select</u> the vehicle you are claiming for. Only one vehicle can be used per claim.
Scheme	This will default to the schemes relevant to your terms & conditions. Please select the appropriate scheme for your claim. Previously you may have used 'Casual' or 'Essential' vehicle schemes. These schemes have been replaced by with the 'Business Car Scheme'.
Date of Travel	Enter the date the journey took place. You can use the calendar  icon or enter the date manually.
Miles claimed	This is the number of miles to be paid . If travelling directly from home, then the number of miles from your home to your normal place of work must be deducted from the total. Please note: Miles claimed should be rounded down to the nearest whole mile.
Journey From	Please include times as well as location when completing this field.
Journey To	Please include times as well as location/s when completing this field.
Reason for Journey	You must enter the reason for your journey/s.
Home to Work Miles	It is essential that if you leave from home or go back home then those miles MUST be off set from your total miles claimed for each journey.

Page 3 - Other Expenses

Element	Date	Reason for Claim	Cash Value		
<input type="text"/>		<input type="text"/>	<input type="text"/>	+	-
Parking		<input type="text"/>	<input type="text"/>	+	-
Subsistence Allowance With Receipt		<input type="text"/>	<input type="text"/>	+	-
Travelling Expenses			0.00	+	-

Element	Using the dropdown menu select the required expense/s e.g. Parking or Subsistence.
Date	Use the calendar  icon and enter the date/s you incurred the expense.
Reason for Claim	You must enter the reason for the claim. This is a mandatory field and must be completed.
Cash Value	Enter the value of your claim to 2 decimal places e.g. 10.20 for £10.20.

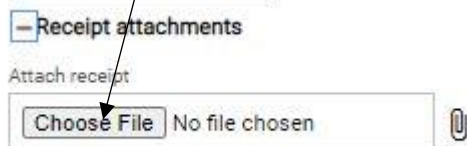
Please see below the current subsistence allowance rates.

Subsistence Type	Value
Breakfast	£4.48
Lunch	£6.17
Evening Meal	£7.64

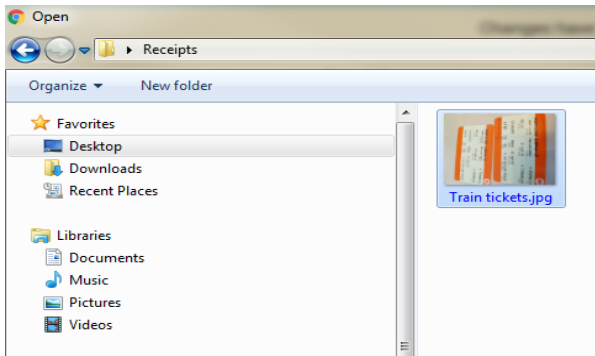
12.2 Attaching Receipts - prior to submitting your claim

You will need to attach all receipts for costs incurred while on Council business, such as fuel and subsistence for each claim.

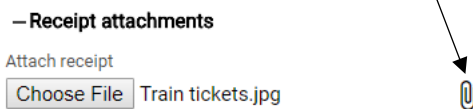
- First, scan and save the receipt ensuring you give the file an appropriate name.
- On the claim page **click 'Submit'**
- Next, **Click** on the **+Receipt attachments** button.
- The **'Attach receipt'** box will appear.
- **Click** on the **'Choose file** button and search for your saved receipt/s



- Navigate to where your receipt/s are saved, select by double clicking on the file. Please note receipt/s can be saved in any format.



- Select the file, **click** on the  icon to add another receipt to your claim.



- If you have multiple receipts to attach, repeat the above process again.

– Receipt attachments

1.
Train tickets.jpg ✕

2.
Train tickets - Copy.jpg ✕

- If you have added a receipt in error, **click** on the ✕ icon next to receipt it will be deleted.
- You will see the receipt/s you have uploaded. Using the dropdown arrow will show them in more detail.

You are now ready to submit your claim

12.3 Submitting your Claim for Authorisation

- Enter your myHR password.

< Back to Time & Expenses

Changes have been saved.

Time & Expenses claim submission:

Claim template:
Travel and Expenses Claim

Job title:
Senior Business Support Assistant - Test

Time and expense claim reference:
EXP000001586

Start date:
01/11/2021

Comments:
Enter your myHR password to certify that you have incurred this expenditure for traveling, subsistence and other expenses to perform approved duties as an employee of East Lothian Council. The amounts claimed are in accordance with the rates and regulation determined by the Council. You further certify that, if claiming business mileage expenses, your vehicle insurance includes its use for business purposes. You also confirm that your vehicle is roadworthy, fit for its purpose and has a current MOT certificate (if applicable). You further confirm that you hold a valid, current driving licence that permits you to drive this vehicle. I certify that the information that I have provided is a true record of expenses that I have necessarily incurred in the course of my official duties and that all the relevant receipts and documentation are attached. Please be aware that regular audit checks are performed each month and any fraudulent claims will be dealt with in accordance with the policy.

Password

+ Receipt attachments

Submit

- When submitting your claim you **MUST Click** the **Submit** button. If you click the 'Enter' button the system will not recognise this action and your claim will remain on the screen.



When you submit your claim if there is any incorrect information an error message will appear on the top of the 'Submission' page in **red**. The message will tell you what is wrong with your claim and on what page. The system will not allow you to submit your claim until you have corrected the problem.

Below is an example of a typical error message:

The fuel type of the vehicle is invalid in the mileage scheme (page 1).
Changes have been saved.

- Once you have made the corrections **Click** the **Submit** button again.

When a claim is submitted you will receive an email which will confirm your claim has been sent to your Line Manager. Your Line Manager will get a email asking them to review your claim.

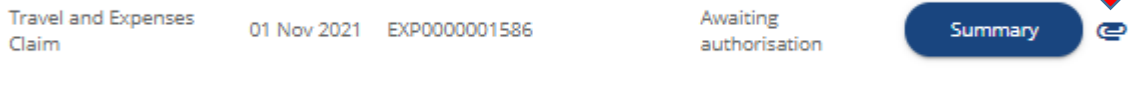


IMPORTANT: It is **essential** you receive the email telling you you've submitted your claim. If you **don't** receive this email, then the system hasn't sent your claim to your manager to review. Even if your claim is showing the status of 'Awaiting Authorisation' - **You need to act: Recall the claim by cancelling it and once the claim has the status of 'Provisional' immediately re-submit it.**

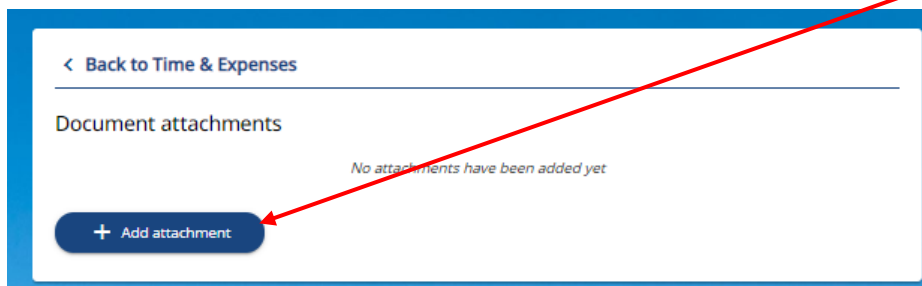
12.4 Attaching a Receipt to a Submitted Claim

If you have submitted a claim and have forgotten to attach the required receipts and the claim is sitting at the status of 'Awaiting authorisation' you can still add receipts.

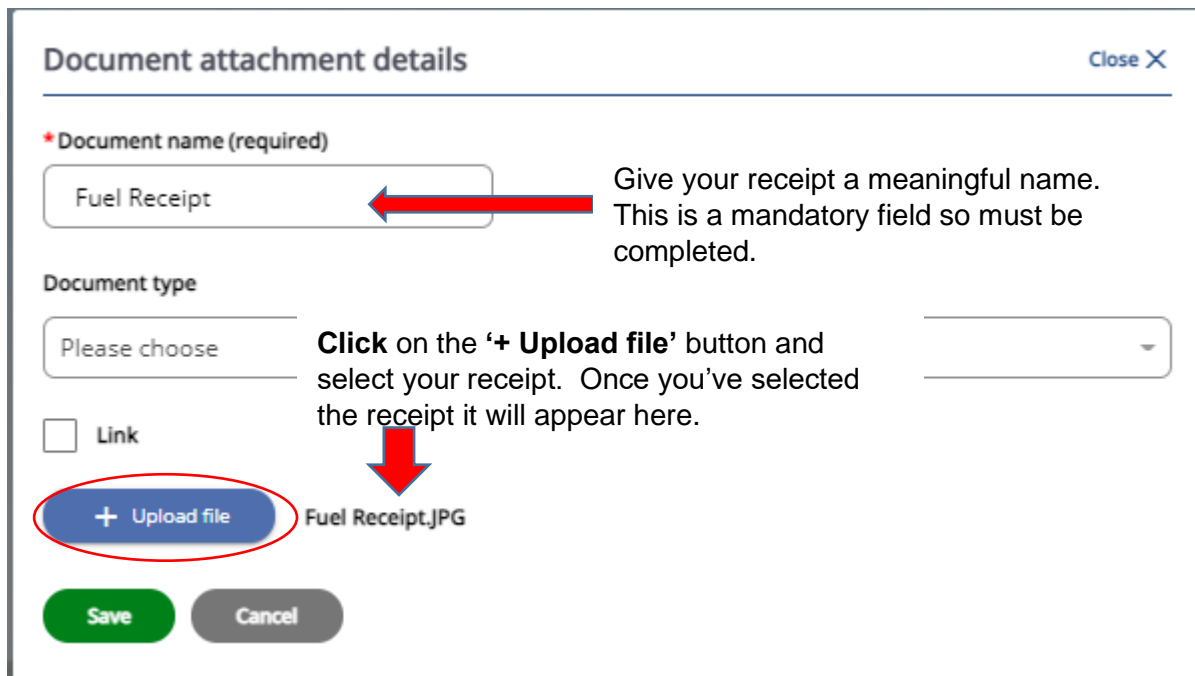
1. Find the claim and at the end of the line click on the 'Paperclip' icon.



2. Next, you will go to the 'Documents attachments' screen. Click on '+ Add attachment'.

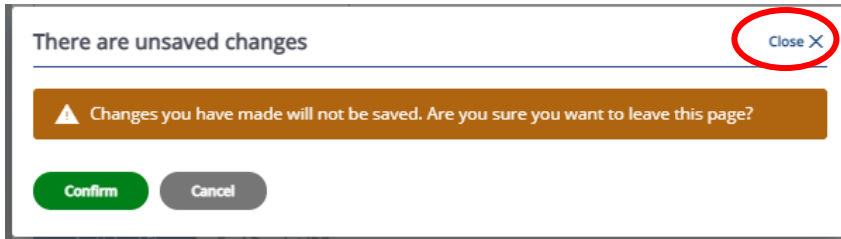


3. The 'Document attachment details' screen will open.





Do not click on the **'Close'** button in the top right-hand corner. If you do you will see a warning message.



- Click **'Cancel'** and you will return to the **'Document attachment details'** screen.
- If you have more receipts to attach, follow the above process but click **'SAVE'**.


Document attachment details Close X

i The document 'Fuel Receipt' has been successfully saved.

*Document name (required)
Fuel Receipt

Document type
Please choose

Link

Existing filename
Fuel Receipt.JPG 

+ Upload file No file selected

Save **Delete** **Cancel**

If you want to download the receipt then click on the download icon.

- When you have finished adding your receipts click **'Close X'** in the top right-hand corner of the page.

12.5 Cancelling a Submitted Claim

If you have submitted a claim in error and you want to recall it to add additional information or to delete it.

The screenshot shows the 'Time & Expenses' interface. At the top, there are filters for 'In progress' and 'Authorised'. Below that are date pickers for 'Start date (dd/mm/yyyy)' (01/11/2021) and 'End date (dd/mm/yyyy)' (01/12/2021), along with a 'Search' button. A table lists three claims:

Claim name	Start date	Reference	Cut off date	Status
Travel and Expenses Claim	01 Nov 2021	EXP0000001585		Awaiting authorisation Cancel
Travel and Expenses Claim	01 Nov 2021	EXP0000001584		Awaiting authorisation Summary
Travel and Expenses Claim	01 Nov 2021	EXP0000001586		Provisional Summary

At the bottom, there is an '+ Add claim' button. A red arrow points to the 'Cancel' button in the first row of the table.

1. Find the claim you want to recall.
2. Click on any detail of the claim as they are all hyperlinks.
3. Your claim will open in full view. At the bottom of the claim page click 'Cancel'. A new screen will appear. If you change your mind, use the navigation option < **Back to Time & Expenses**' and you'll go back to the previous page.

You will see a 'Warning' message on the top of the screen.

The screenshot shows the 'Cancel time & expenses claim' screen. At the top, there is a warning message: "By cancelling this claim any linked workflow tasks will also be cancelled." Below this, the claim details are displayed:

Cancel time & expenses claim:
Claim template: Travel and Expenses Claim
Job title: Senior Business Support Assistant - Test
Time and expenses claim reference: EXP0000001585
Start date: 01/11/2021
Password:

A red arrow points to the password field. To the right of the password field, text says: "Enter your myHR password. The following warning message will appear." Below the password field, there is a 'Cancel' button. At the bottom of the screen, there is a 'Back to Time & Expenses' button.

Below the main screen, a modal dialog box is shown with the following text:

ce0372te.webitrent.com says
Cancelling the timesheet approval process will return the timesheet to a provisional status. Do you want to continue?
[OK](#)

A red arrow points to the 'OK' button. Below the modal dialog box, there is another warning message: "By cancelling this claim any linked workflow tasks will also be cancelled." To the right of the modal dialog box, text says: "Click 'OK'".

You will now see the claims status has changed from 'Awaiting authorisation' to 'Provisional'.

The screenshot shows the 'Time & Expenses' interface. At the top, there are filters for 'In progress' (checked) and 'Authorised'. Below these are date pickers for 'Start date (dd/mm/yyyy)' set to 01/11/2021 and 'End date (dd/mm/yyyy)' set to 01/12/2021. A 'Search' button is present. The main area contains a table with columns: Claim name, Start date, Reference, Cut off date, and Status. There are three rows of claims, each with a 'Summary' button and a small icon. The first and third rows have a status of 'Provisional', while the second row has a status of 'Awaiting authorisation'. At the bottom, there is a '+ Add claim' button.

Claim name	Start date	Reference	Cut off date	Status
Travel and Expenses Claim	01 Nov 2021	EXP0000001585		Provisional
Travel and Expenses Claim	01 Nov 2021	EXP0000001584		Awaiting authorisation
Travel and Expenses Claim	01 Nov 2021	EXP0000001586		Provisional

12.6 Resubmitting a Rejected Claim

If your claim has been rejected by your Line Manager, you will receive an automated email that will give you the reason why. Using the reference number in the email will help you find the claim.

When you find the claim, the status will have changed to **'Rejected'**.

Depending on the reason why your claim was rejected you may be able to resubmit it. To resubmit a rejected claim **double click** on the claim and it will open into full view.

You have two options:

Option 1.

- Amend the claim and save as 'Draft'.
- You will now see the status of the rejected claim has changed to **'Provisional'**.
- Remember to resubmit your claim once amendments have been completed.

Option 2.

- Amend the claim and immediately resubmit it to your Line Manager. The status of the claim will change to **'Awaiting authorisation'**.
- You and your Line Manager will receive automated emails confirming the resubmission of the claim.



When amending a rejected claim you must take care **not** to click the **'Delete' button**. If you click **'Delete'** you will **not** get a warning message. Instead your claim will be **immediately deleted** from your account and from the system.

13 Excess Travel Expenses

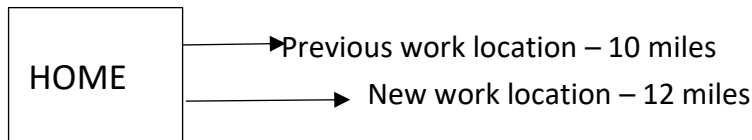
Overview

Excess Travelling Expenses falls into either of these two categories:

1. You are expected to work at an alternative work location from your normal place of work, and this journey results in excess mileage. You will be recompensed at the Public Transport Mileage rate.
2. Your normal place of work location has been changed due to redeployment or relocation of work premises. You will be compensated for excess travelling costs at the Public Transport Mileage rate for a period of 4 years from the date of transfer.

This allowance will not be paid for the entire home to work journey, just the difference in mileage from home to previous workplace and home to new workplace.

For example:



In the above example the individual is eligible to claim the difference of 2 miles per journey, at 22.5p/per mile.



Employees who have been **approved** to claim Excess Travelling Expenses **do not have** to register their personal and vehicle details on the DAVIS system.

Registration on DAVIS only applies if you intend to use your car to carry out your daily working duties.

13.1 Excess Travelling Expenses Claim Form Layout

The claim form is split into 3 Sections:

Section 1	Provides you with details of the Job you are claiming against. <i>If you have multiple jobs this allows you to confirm you have selected the correct one</i>
Section 2	Provides you with information which will assist you in completing the claim form.
Section 3	These are the fields that you will enter your claim information into.

The screenshot shows a web form titled 'Time and expenses' with a sub-header 'Excess Travelling Expenses Claim'. It is divided into three sections:


- Section 1:** Contains introductory text, a disclaimer, and a 'PLEASE NOTE' section with an example calculation: 'Home to PREVIOUS work location 10 miles NOW Home to NEW work location 12 miles. This example shows the employee is eligible to claim the difference of 2 miles per journey.'
- Section 2:** Contains instructions on how to submit the claim, including a note that it will be sent electronically to the Line Manager for authorisation.
- Section 3:** A table for entering claim details. The table has columns: 'Element', 'Date', 'Home to Former Work Location & RETURN incl Mileage', 'Home to NEW Work Location & Return incl Mileage', 'Date of Transfer', and 'Daily additional RETURN mileage'. The first row shows 'Excess Travel' with a date picker icon, two greyed-out input fields, a date field, and a 'Daily additional RETURN mileage' field with a value of '0.00' and plus/minus symbols.

At the bottom right of the form are buttons for 'Save draft', 'Submit', and 'Print'.

For more information about making a claim click [here](#) to read the Travel Allowance Policy.

To make a claim select the template form titled ‘**Excess Travelling Expense Claim**’. Follow the same process detailed above under the heading ‘**Creating a new claim for Business Mileage or Other Expenses**’ when making your claim.

The table below provides more detail on the information required to complete the form. Please note that **All** ‘Greyed out’ fields are mandatory and must be completed.

Element	This field is pre-populated and cannot be changed.
Date	Using the calendar  icon select the dates for your claim. Please note: Claims greater than 90 days cannot be processed by the system and require authorisation by your Head of Service. For more information, please contact your Line Manager.
Home to former work location	Enter the details of where you journey from.

Home to New work location	Enter the details of your new work location
Date of Transfer	This field is only to be completed if your work location has been permanently changed due to redeployment or change of work premises for a period of 4 years from this date. <i>You only need to enter this date once.</i>
Daily additional Return mileage	Enter the difference in miles from you previous work location to your new work location. Please note: Miles claimed must be rounded down to the nearest whole mile.

Element	Date	Home to Former Work Location & RETURN incl Mileage	Home to NEW Work Location & Return incl Mileage	Date of Transfer	Daily additional RETURN mileage
Excess Travel	15/12/2020	10	12		2.00
Excess Travel	22/12/2020	10	12		2.00
Excess Travel	05/01/2021	10	12	05/01/2020	2.00
					6.00

14 Resetting your Password

ELC log-in: if you use your ELC details to access your account, then you will need to contact the **IT Departments Service Desk** and they will provide you with your password.

IT Service Desk contact details:

- Email: itservicedesk@eastlothian.gov.uk
- Tel: 01620827205

Personal email address: if your own email address is linked to your account then follow the process detailed below.

1. On the login screen **click** the **'Forgotten password'** link.

- Next, enter your email address for the verification code, this must be the email address you used to register with.

iTrent
Password Reset
Please verify your email address.
* Email Address (required)
Send verification code

- When you receive the email enter the code and **click verify**

iTrent
Password Reset
Verification code has been sent to your inbox. Please enter code below
* Email Address (required)
* Verification code (required)
Verify code

iTrent
Password Reset
Email address verified. You can now continue.
* Email Address (required)
Change email
Continue



If you need another code **click 'Send new code'** which will generate another email with a new 6-digit verification code.

- When verifying you'll be asked to enter a new password and then enter it again to confirm it.
- Next, **click 'Continue'**. You will see a message confirming your password has been reset.

iTrent
New Password
* New Password (required)
* Confirm New Password (required)
Continue

iTrent
Password Reset
Your password has been successfully reset. Please visit your normal login URL and enter your new password.
Continue

[END OF GUIDANCE NOTE]