



The
University
Of
Sheffield.

**Department
Of
Finance.**

myExpenses: making a claim

A web based, self-service guide for university employees claiming expenses in myJob

Introduction

myExpenses can be used to submit and amend an expense claim form, which once checked and approved is reimbursed through your monthly payslip.

Note: these procedures are for those paid on the Main Monthly Payroll only.

If you are not on the monthly payroll, please choose the appropriate option:

- Casual staff (casual staff are able to use the staff form):
http://www.sheffield.ac.uk/polopoly_fs/1.5647!/file/Expenses_Claim_Form_Staff.docx
- Non-staff (non-staff are those who are not paid on any payroll. This includes students):
http://www.sheffield.ac.uk/polopoly_fs/1.255586!/file/Expenses_Claim_Form_Non_Staff.doc

Before entering your claim, ensure that you have:

- checked that any claim for expenses satisfies all the criteria as per the University's Financial Regulations:
http://www.sheffield.ac.uk/polopoly_fs/1.293457!/file/Financial_Regulations.pdf
- details of the dates that the claim covers, together with original itemised proof of purchase. Credit or Debit card slips will not suffice as this is an HMRC requirement that must be complied with
- details of all persons that the claim covers
- the departmental cost codes, or WBS element (research grants etc.) that the claim needs to be charged to

After saving and submitting, ensure that you have:

- printed off the claim sheet
- attached all original receipts
- forwarded these to your departmental checker

The electronic claim will then be checked and approved by the appropriate members of staff in your department.

If you have all of the relevant information and receipts, please continue to submit your claim as follows:

To start your myExpenses claim:

Log into MUSE as you would for access to myJob / myTeam / e-Recruitment.

PLEASE READ:

- if claiming mileage only, follow steps 1 to 3.14
- if claiming for expenses not related to mileage, complete sections 1 to 5, whilst ignoring sections 3.6 to 3.14
- if claiming for expenses and mileage together, follow steps 1 to 3.10 then proceed to step 4.0

1. Select Expenses

Services Overview | Index

Annual Leave
Request/cancel annual leave and view your current balance

Apply for Jobs
Search and apply for jobs within e-Recruitment, the University's on-line recruitment system.

In order to access the application form, you should ensure that you have pop-ups allowed for jobs.shef.ac.uk. For guidance on how to allow pop-ups, and for information on the browsers supported by e-Recruitment please see the Supported Browsers link below.

If you are using e-Recruitment for the first time, please synchronise your passwords. A link to the relevant CiCS web page is provided below.

[Supported Browsers](#)
[Change Password](#)

My Staff Record
View your employment details and maintain your academic and professional qualifications using this service.

Payslip
View your current and previous payslips and other additional information.

Please be aware when you are viewing any PDF's including your payslip, the PDF file is downloaded and saved to the machine you are working on. To keep your information secure you may wish to delete the file from the machine you are working on.

Personal Profile
In this area, you can use services to maintain and display your personal data.

[My Equality Data](#)
[Permissions & Disclosures](#)

Expenses
Submit personal expenses for approval and view your existing claims.

Expenses will only be initially available to people in pilot departments.
[Expenses on behalf of](#)

2. Select Create New Expense Report (You may have to wait for the screen to refresh)

All My Expense Reports (26)

View: [Standard View] | [Display/Print](#) [Change](#) [Copy](#) [Delete](#) [Create New Expense Report](#) [Filter Settings](#)

Alert	Start Date	End Date	Destination	Reason	Reimbursmt	Currency	Processing Status	Inbox(es)
⚠	03.06.2014	03.06.2014	Manchester	EA Conference	20.00	GBP	Draft	
⚠	30.07.2014	30.07.2014	Manchester	legal Conference	19.20	GBP	Submitted	Theresa May
⚠	28.07.2014	28.07.2014	Barnsley	remote access	20.00	GBP	Submitted	John Redwood
⚠	29.07.2014	29.07.2014	London	Presenting Paper at Conference	9.50	GBP	Draft	
⚠	01.07.2014	02.07.2014	Manchester	UoS Conference	120.00	GBP	Submitted	Theresa May
⚠	26.07.2014	27.07.2014	Dublin	Annual legal Conference	530.00	GBP	Submitted	Theresa May
⚠	17.07.2014	17.07.2014	London	AU Conference	20.00	GBP	Submitted	Theresa May
⚠	01.05.2014	02.05.2014		books	500.00	GBP	Submitted	Theresa May
⚠	04.07.2014	04.07.2014		books	10.00	GBP	Draft	
⚠	09.07.2014	09.07.2014	LONDON	Conference	100.00	GBP	Submitted	John Redwood

[Refresh](#)

3. Enter your claim details

3.1

General data: Enter the start and end dates relevant to the expenses
NB: for costs paid in advance, do not enter future dates; instead, enter the booking/payment date

3.2

NB: only change the departure and arrival options if your travel started and/or ended at home

3.3

Destination: Choose the relevant country/region from the drop down box and then enter your destination

Show/Hide Calendar of Expense Claims

General Data
Start Date: * 26.07.2014 00:00 Departure from Workplace
End Date: 27.07.2014 00:00 Arrival at Workplace

Destination
Country / Region: Great Britain
Destination: Dublin

Additional Information
Reason for Expenditure: Annual legal Conference
 Use as default reason for receipts

Cost Distribution (funding details)
Cost Distribution: * 100.00 % Cost Center 300020 (HST General), Funds Center 300020 (HST General) Cost Distribution
Ensure that you enter a correct Cost Centre or WBS Code , as default codes cannot be used for payment.

Mileage
Total Distance: 700 Miles Vehicle Type: Casual User Vehicle Class: ALL Cars Enter Mileage Details


Previous Step Enter Expense Receipts Mileage Only Claim Save Draft

3.4

Additional Information: Enter the reason for your expenditure. For conferences, enter the title of the event

3.5

Cost Distribution: Cost Distribution codes are unique to each department. You should already know which code is relevant to your claim. If not, please contact the appropriate person in your department. Continue to point 3.5.i on the next page to enter the correct Cost Code, if you know it, by selecting

 **Cost Distribution**

3.6 If you are not claiming for mileage, go to step 4.0

Mileage: If you are claiming mileage, enter the total distance for your journey. For Vehicle Type, leave as Casual User unless the mileage is specifically for:

- Bicycle, Motorcycle, or you have been told it is for taxable car mileage, lease car mileage, or taxable motorcycle. If this is the case, select the relevant **Vehicle Type** using the dropdown box.

If Bicycle, Motorcycle, or taxable Motorcycle choose the relevant vehicle class, otherwise leave as **ALL Cars**. Continue to step 3.7 by selecting

 **Enter Mileage Details**

3.5. i Cost Distribution Code

Funding type: from the drop down facility, choose the correct funding type. You should already know if your funding type is a Cost Centre or a WBS Element. If you are unsure, please contact your departmental checker

The screenshot displays the 'Change Expense Report (100000531)' interface. At the top, there are four numbered steps: 1. General Data, 2. Cost Distribution (highlighted), 3. Enter Expense Receipts, and 4. Review and Send. Below the steps, the employee name 'Mr Nigel Lawson (10000563)' and dates 'Start Date 03.06.2014' and 'End Date 03.06.2014' are shown. A warning message states: 'Ensure that you enter a correct Cost Centre or WBS Code, do not submit a default code as this could result in delayed payment'. The 'Cost Distribution for claim' section includes buttons for 'New Entry', 'Check cost distribution', and 'Delete line(s)'. A table with columns 'Cost Assign (%)', 'Funding Type', and 'Funding code' is visible. The first row shows '100.00', 'Cost Center', and '300020 - HST General'. Below the table, there is a 'Cost Center' input field with '300020' and a dropdown menu showing 'HST General'. Buttons for 'Add line to funding table', 'Check line', and 'Delete line' are present. At the bottom, there are 'Previous Step', 'Continue', and 'Save Draft' buttons.

Cost Assign (%)	Funding Type	Funding code
100.00	Cost Center	300020 - HST General

3.5.ii

Select the relevant Cost Distribution Code from the drop down facility, or by entering directly. Select **Add line to funding table** and then press **Continue**

3.7 Mileage – select yellow highlighted line

3.8

Use the **Comments** box to list any passenger information, or to explain any unusual circumstances e.g. using a different route due to bad weather conditions/roadworks.

Following this, select [+ Add mileage line to table](#)

NB: if you have missed putting in mileage from the previous screen, you can enter it in now. Additionally, you **must** also enter the Start/End Location

Date	Miles Driven	Start Location	End Location
26.07.2014	0		Dublin

Comment:

[+ Add mileage line to table](#) [Change Cost Distribution](#) [Copy](#) [Delete line](#)

[Previous Step](#) [Continue](#) [Save Draft](#)

3.10

Mileage details: If required, select [New Mileage line](#) and enter the details of your other journeys and

[+ Add mileage line to table](#).

Then, select [Continue](#)

3.9

If this journey needs to be coded to a different Cost Centre or WBS Element, click on [Change Cost Distribution](#) as shown by step 3.9.i (Adding cost Distribution to a mileage line)

3.9.i Adding Cost distribution to a mileage line
(If different from Code entered at 3.4)

Funding type: from the drop down facility, choose the correct funding type. You should already know if your funding type is from a Cost Centre or a WBS Element. If you are unsure, please contact your departmental checker

Cost Assign (%)	Company Code	Funding Type	Funding Code
100.00	University of Sheffield	Cost Center	300020

Cost Distribution Table

Buttons: Add line to funding table, Check line, Delete line

Buttons: Continue, Cancel

3.9.ii
Select the relevant Cost Distribution Code from the drop down facility, or by entering the Code manually. Select **Add line to funding table** and then press **Continue**

3.11 Mileage only claims: select Mileage only claim

Mileage

Total Distance: 700 Miles Vehicle Type: Casual User Vehicle Class: ALL Cars Enter Mileage Details

Previous Step Enter Expense Receipts Mileage Only Claim Save Draft

3.12

Summary

Total Mileage	280.00 GBP
Total Expenses	280.00 GBP
Amount Reimbursed	280.00 GBP
Amount Paid Out	280.00 GBP

Cost Distribution (funding details)

280.00 GBP Company Code S001 (University of Sheffield) Cost Distribution showing funding details ds Center 300020 (

Action

Save Draft I only want to save my expense report and will send it later

Save and Send for Approval I want to save my expense report and send it now for further processing

I confirm that all expenses were incurred by and on behalf of the University

[Previous Step](#) [Save Draft](#)

3.13

- To complete your claim, select **Save and Send for Approval**
- Alternatively, should you wish to save your claim and return to it at a later date, select **Save Draft**
- **IMPORTANT:** You must [Save and Send for Approval](#) to start the approval process

3.14 Display/Print Expense Statement

Expense report 0100000522 was saved and SUBMITTED for approval.

Claim submitted. Please print the expense form and attach any paper receipts to it.

[Display/Print Expense Statement](#)

[Previous Step](#) [Save and Send for Approval](#)

IMPORTANT: It is essential that you **print this statement** and forward it to your departmental checker; otherwise, your claim will be delayed.

If claiming mileage only, the process has now been completed.

For claims including receipts:

4.0 Select Enter Expense Receipts

General Data

Start Date: * 03.06.2014 00:00 Departure from Workplace
End Date: 03.06.2014 00:01 Arrival at Workplace

Destination

Country / Region: Great Britain
Destination: Manchester

Additional Information

Reason for Expenditure: EA Conference
 Use as default reason for receipts

Cost Distribution (funding details)

Cost Distribution: * 100.00 % Cost Center 300020 (HST General), Funds Center 300020 (HST General) [Cost Distribution](#)

Ensure that you enter a correct Cost Centre or WBS Code , as default codes cannot be used for payment.

Mileage

Total Distance: 50 Miles Vehicle Type: Casual User Vehicle Class: ALL Cars [Enter Mileage Details](#)

[Previous Step](#) **Enter Expense Receipts** [Mileage Only Claim](#) [Save Draft](#)

4.1 Select New Receipt

1 General Data 2 **Enter Expense Receipts** 3 Review and Send 4 Completed

Employee [Mr Nigel Lawson \(10000563\)](#) Start Date 03.06.2014 End Date 03.06.2014

Receipts in This Expense Report

[New Receipt](#) [Copy](#) [Delete line\(s\)](#)

No.	Status	Expense Type	Receipt Amount	Receipt Currency
No receipts have been entered. Add them with the "New Receipt" button if relevant. For Mileage Only claims skip this step by clicking the "Review and Send" step at				

[Previous Step](#) [Next Step](#) [Save Draft](#)

4.2 Enter the claim details as per the receipts that you are providing

4.3

On the yellow highlighted line beginning with **Expense Type**, select your expense type from the drop down box

4.4

Receipt Amount: this must reflect the amount shown on the receipt

4.5

Receipt date: enter the date as shown on your receipt. Change the default date if required

No.	Status	*Expense Type	*Receipt Amount	Receipt Currency	Receipt Date
001		Accommodation (Overseas)	250	British Pound	26.07.2014




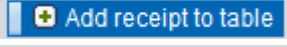
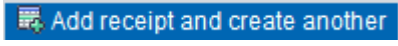
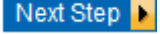
Tax Code: M0 [VAT Coding Help](#)
 Please contact the University Tax Section before using VAT Codes prefixed (*)
[Tax Section Contact Details](#)

Start Date: * 27.07.2014 End Date: 28.07.2014

Business Purpose: * Annual legal Conference

Comment: Hotel Accommodation for one night

4.6

- **Tax Code (VAT):** input the correct code if known, otherwise your checker will change the VAT Code where necessary
- **Start Date and End Date:** are required for some Expense Types. Where necessary, enter the dates shown on the receipt
- **Business purpose:** this will default from what was entered in the Additional Information tab. You may change it if required
- **Participants:** for some Expense Types, you will be presented with a participant's option. If necessary, select  **Enter Participants (if more than just the claimant)** and a new screen will appear where you must enter the names of all people involved in the claim. To do this, select  **New Participant** and select the yellow line to enter their names. Then select 
- **No. of employees/Guests:** this will show for some expense types. If so, these fields must be completed
- **Comment:** add any additional information that you think is relevant to your claim
- **Foreign Currencies:** if you wish to make a claim in a foreign currency, please select **Receipt Currency** and choose the relevant option from the drop down facility. The appropriate exchange rate will be calculated automatically **according to the rate at the time of claiming**
- If you are only entering one receipt select . Alternatively, if you are entering a number of receipts select  by following steps 4.3 to 4.6 again
- To proceed, select 

4.7 Save and Send for approval

Summary

Total Mileage	280.00 GBP
Total Individual Receipts	250.00 GBP
Total Expenses	530.00 GBP
Amount Reimbursed	530.00 GBP
Amount Paid Out	530.00 GBP

Cost Distribution (funding details)

530.00 GBP | Company Code S001 (University of Sheffield), Cost Center 300020 (HST General), Funds Center 300020 (HST General), Fund CORE (CORE), Function

Action

- Save Draft I only want to save my expense report and will send it later
- Save and Send for Approval I want to save my expense report and send it now for further processing
confirm that all expenses were incurred by and on behalf of the University

- To complete your claim, select **Save and Send for Approval**
- Alternatively, should you wish to save your claim and return to it at a later date, select **Save Draft**
- **IMPORTANT:** You must **Save and Send for Approval** to start the approval process

4.8 Display/Print Expense Statement

Claim submitted. Please print the expense form and attach any paper receipts to it.

Display/Print Expense Statement (opens in a new window)

- Select . This will open in a new window
- You **must** print this statement, attach all the relevant receipts and information and then send to your departmental checker