



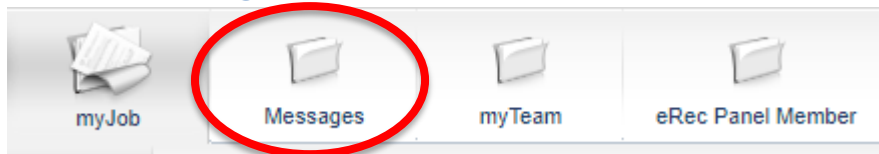
The
University
Of
Sheffield.

**Department
Of
Finance.**

myExpenses: checking a claim

A web based, self-service guide for departmental
checkers using myTeam

1. Select Messages



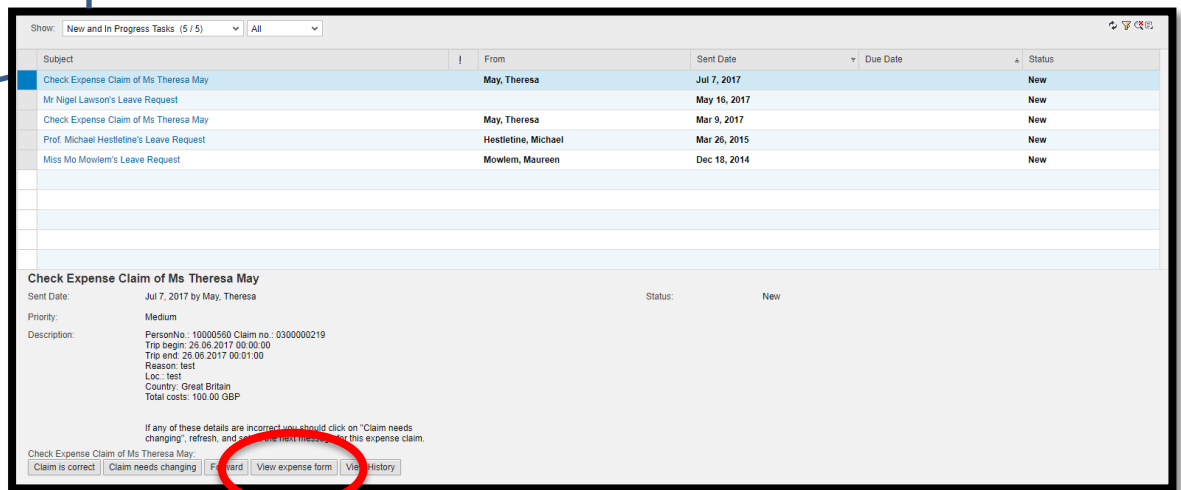
2. Check Expense Claim for the appropriate employee

2.1

Using the dropdown facilities, you may search for, and prioritise your current or previous workload

2.2

Select the appropriate employee by clicking the blue square and then selecting **View Expense Form.**



- After selecting , a new window will appear with the Travel Expense Statement available to see. See point 3
- You will not require a hard copy of the claim to trigger the checking process. All messages with claims that require checking should be checked. We recommend checking your messages every few days for new claims to check. Please be aware that you will receive an email when a new claim is available for checking.
- If you believe that the claim needs amending, see step 4.

3. Travel Expense Statement

3.1 General details:

Ensure that the Name and, Personnel number and dates are correct. Additionally, the Cost Centre Code must be correct

3.2 Cost Assignment:

Check that the correct departmental cost codes have been used. If not, you are required to change this in order to assign the expense to the correct Cost Centre or WBS Code

The University of Sheffield
 Miss Mo Mowlem
 10000562
 Administration
 Cler & Sec
 0300000222

University of Sheffield
 Fifth Court
 Western Bank
 Sheffield
 S10 2TN
 Date: 8 Aug 2017
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Expense Report/Travel Expense Statement (Simulation)
 For Miss Mo Mowlem For Trip 300000222 From 6 Aug 2017 To 7 Aug 2017

General Data

Reason: Presenting at ISMC Conference

Itinerary

Date	Event	Country	City	Reason
06/08/2017	Start of Trip	GB		
06/08/2017	Trip Destination	GB	Edinburgh	Presenting at ISMC Conference
07/08/2017	End of Trip	GB		

Settlement Results and Cost Assignment

Amount Type	Amount (GBP)
Sum of Receipts to be Reimbursed	86.00
Reimbursement Amount	86.00

86.00 GBP of 86.00 GBP assigned to:

Company Code: S001 University of Sheffield
 WBS Element: R/167000-11-1 Expenses Testing
 Funds Center: S00EXT External
 Fund: RESEOUNCIL
 Functional Area: RESEARCH Research
 Grant: 167000-1 EXPENSES TEST

Receipts

Date	No.	VAT	Expense Type	Amount (GBP)
06/08/2017	001	MO	Air Travel (UK)	67.00
06/08/2017	002	MO	Hospitality	19.00
		MO	Sum of Receipts	86.00

Reimbursement Amount: 86.00 GBP

If submitting a claim for mileage, I certify that I have a current valid driving licence, that my vehicle is insured for business use, has a current MOT certificate (where appropriate), has been properly maintained and is in a roadworthy condition as required by the University's Work Related Driving Policy. <https://www.sheffield.ac.uk/hr/transport/mileage>

3.3 Itinerary: Check that the Trip Destination and dates are consistent with the hard copy and the receipts provided. Also ensure that a detailed reason is provided

3.4 Total Amounts
Check that the total amount to be reimbursed is correct and is consistent with the supporting receipts

3.5 Per Diem Settlement/Itemization:
This relates to the type of expense being claimed. Ensure that the correct Tax (VAT) Code has been used

3.6 Additional Information (next pages)

Check that all relevant information is given including mileage, passenger and guests where relevant



4. Checking and amending a claim

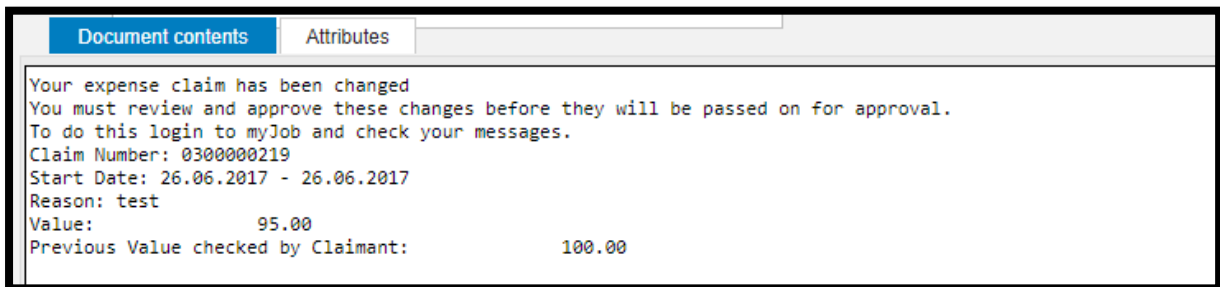
The scanned receipts (attachments) will be available above the claim details. Simply click on each one to download and view it.

Trip Form		
Title	Added By	Added On
MedQual_Colour_FullSizeScan	Miss Mo Mowlem	08.08.2017
iPhoneTest_2	Miss Mo Mowlem	08.08.2017
iPhoneTest_5	Miss Mo Mowlem	08.08.2017

You will need to check each attachment thoroughly to ensure that the amounts, date and items on the receipt(s) match the information on the claim.

- If you are satisfied that the information is correct, select in order to complete this stage of the process.

- If you are not satisfied that the claim has been submitted correctly, (meaning either the amount, Cost Centre Distribution Codes, or Tax Codes are incorrect) please select **Claim needs changing** then Refresh  (located on the top right). You can also use this option if you wish to add attachments to the claim.
- As with step 2.2 you will need to select the relevant employee by identifying the Claim number and selecting the following blue box: **Correct Claim no. 0300000219**
- Now select **Change Claim** and you will be able to change the claim. Details for how to do this can be seen in the “Full Guide to Making a Claim” on the [Expenses webpages](#). Remember to **Save and Send for Approval**
- Should you change the Cost or Tax (VAT) Codes, or add attachments, the claim will automatically continue to the approver stage
- If you are required to change the amount to be claimed, you will need to notify the claimant, providing reasons for this change in their expenses claim. In order to do this, select Refresh  and then select the following blue box showing the relevant employee’s name: **Send reason for corrected expense claim for Ms Theresa May**, then **Open Task**.
- See below for an example of the messaging window. You can ignore most buttons and options on here – simply type your message at the top of the text box. Once you have typed your message, select **Send...**
- The claimant will then receive a copy of your message in their university email inbox. See below for an example:



IMPORTANT:

- **If you are changing the amount to be claimed, the claim automatically returns to the claimant for the changes to be approved. They will be notified by email to do so. Once they’ve approved it, it’ll be resent for checking.**
- **If you are only changing the Cost centre/WBS, or Tax (VAT) Codes, or adding an attachment, the claim will automatically be sent to one of the departmental approvers as this does not require consent by the claimant**