

## **Employee Self Service**

## Submit a Mileage Claim

## **NOTE** Guidance for submitting Mileage Claims on Oracle – please read before proceeding

To access Oracle, click here: <u>https://ebs.int.erp-sop.co.uk</u>.

If you are accessing Oracle outside of the EANI Network, please use: <u>https://ebs.erp-sop.co.uk/</u>

- Please ensure your supervisor is correct on the system before submitting a claim. **DO NOT** submit claims to an incorrect supervisor.
- You can update your supervisor by contacting the EA One Helpdesk at <u>eaonehelpdesk@eani.org.uk</u>. You will require confirmation from your Head of Service for this to be amended on the system.
- Claims over 3 months' old must be approved by an Assistant Director. Approval can be received by email from your relevant AD and then attached to the claim.

Please key individual days when making a mileage claim on the system.

In cases where this is not feasible (such as when you have a large volume of individual journeys over a claim period), please key one **summary claim** for the total mileage of the claim period. To support this, **you must attach your approved Mileage Form** detailing out all the journeys taken.

A copy of this form is available here for corporate users: <u>https://sharepoint.eani.org.uk/forstaff/travel/Pages/default.aspx</u>

For school staff, this form is also available on the C2K intranet.

Please follow the below steps as required, with the following additional points:

- For keying multiple days in a single transaction, guidance is on **Step 14**.
- For keying a summary claim, follow the core process but **put through the total mileage** of the claim period in one form (e.g. the total miles of journeys taken in a month). Then when you go to submit, attach the Mileage Form with the claim. This is detailed in Steps 17 & 18.

| 1 | On the Oracle homepage, select the <b>EA Employee Self Service, Education Authority BG</b> responsibility.                            |
|---|---|
|   |   |
|   | ORACLE E-Business Suite   |
|   | Home  |
|   |   |
|   | EA One HR & Payroll / Oracle Finance System – Pla<br>17th October, the EA One HR & Payroll / Oracle Fi<br>iProcurement, C             |
|   | Navigator   |
|   | Personalize   |
|   | EA Employee Self Service, Education<br>Authority BG   |
| 2 | After selecting the responsibility you can now view the drop-down menu. Select <b>Payroll</b><br>Information and then Mileage Claims. |
|   | EA Employee Self Service, Education<br>Authority BG   |
|   | All Actions Awaiting Your Attention   |
|   | Annual Leave Request  |
|   | My Information  |
|   | Payroll Information   |
|   | Education Authority Online<br>Payslip   |
|   | Assignment Level Payslip  |
|   | Bank Details  |
|   | ■ P60   |
|   | Mileage Claims  |
|   | Absence Information   |
|   |   |

The Mileage Claims window will be displayed. Please read the Terms and Conditions in red carefully. To start a new claim, click **Mileage Claims**.

3



If you have any previous claims on the system, the claim history will display on this page also:

| 🔣 も ら 🌣 🗸           | 8        |         |             |       |       |             |                   |             |                    |
|---------------------|----------|---------|-------------|-------|-------|-------------|-------------------|-------------|--------------------|
| Effective           | End Date | Туре    | Option      | Value | Units | Occurrences | Status            | Update/View | Delete/Discontinue |
| As soon as possible |          | Mileage | Car Mileage |       | GBP   | One         | Awaiting Approval | 200         | 1                  |
| 01.05.2023          |          | Mileage | Car Mileage |       | GBP   | One         | Processed         | 1           | Î                  |
| 01.05.2023          |          | Mileage | Car Mileage |       | GBP   | One         | Processed         | 1           | Â                  |

| 1. The vehicle whether the | ich I used to make the journey(s) claimed for is insured:                        |
|--|--|
| The policy –   |  |
| (a) allows me to   | use the vehicle on my employer's business.                                       |
| (b) allows me to a   | accept the mileage allowance that I am claiming.                                 |
| (c) will meet the oparties.                                    | cost of any claims made against the Education Authority by third                 |
| (d) will be produc   | ced for inspection, by the Education Authority, if requested.                    |
| 2. The journeys of<br>include any hom                          | claimed for were made on Education Authority business and do n e to base travel. |
| 3. The stated mile   | eage is correct.   |
| By submitting th   | is claim I confirm that I agree to the conditions specified above.               |
| Select a Type  | 9  |
| * Claim Type   | Mileage 🗸  |
|  | One Millerere  |

5 Once you've done this, a form will open below. Begin to fill out the form as required. Starred fields are mandatory. Select Casual or Essential user in rate type field according to your contract. If you are an essential user, this will be stated in your employment contract. For Location from, Location To and Via fields the name of the location and Post Code are acceptable to use. Rates will be applied based on Claimed Mileage. Claimed Mileage is the shortest route. Actual **Mileage** is the mileage which you have actually travelled but may not be the shortest route. When you get to the **Purpose** field, click the **Search** button (indicated below). Details TIP Engine Capacity needs to be numeric e.g. 2000 Currency = GBP unless otherwise noted. \* Rate Type Essential ¥ \* Claim Start Date 01.09.2022 Ë6 \* Claim End Date 01.09.2022 Č6 \* Claimed Mileage 40 Actual Mileage \* Location From EA Office 1, 123 EA street, BT1 1AB \* Location To EA Headquarters Dundonald Via \* Purpose V Q \* Vehicle Reg Number \* Engine Capacity No of Passengers \* Fuel Type Petrol \* Purpose of Journey or Comments Cost Allocation EO Cost Centre.Resource.Function.Project 6 Click Go. Search and Select: Purpose Cancel Select Search To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button. Search By Purpose V Go Results Quick Select Purpose No search conducted.

| Search   | and Select: Purpos   | e   |   |  | Cance   | Select                                |
|--|--|---|---|--|---|---------------------------------------|
| Search   |  |   |   |  |   |                                       |
| To find you  | r item, select a filter item in the  | e pulldown list and e   | enter a value in  | the text field, th                               | nen select the "C                                     | Go" button.                           |
| Search By  | Purpose 🗸  |   | Go  |  |   |                                       |
| Results  |  |   |   |  |   |                                       |
| Select   | Quick Select   | Purpose   |   |  |   |                                       |
| 0  |  | Home to Permanen  | t Place of Work   |  |   |                                       |
| 0  | E.   | Home to Temporary   | Place of Work   |  |   |                                       |
| 0  |  | Home to Training C  | ourse   |  |   |                                       |
| •  |  | Office to Office  |   |  |   |                                       |
| 0  |  | Office to Training C  | ourse   |  |   |                                       |
| 0  |  | Other   |   |  |   |                                       |
| 0  | ==   | School to School  |   |  |   |                                       |
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| ntinue t<br>ferent b<br>u don't<br><b>DTE - Pl</b> i         | o fill out the form wi<br>udget to your regula<br>need to do this, skip<br>ease use exact CC (do   | th the require<br>r place of wo<br>ahead to <b>Step</b><br>o not round)   | ed informa<br>rk, click the<br><b>o 12.</b><br>in the engi  | tion. If you<br>e <b>magnify</b> i<br>ne capacit | u need to c<br>i <b>ng glass ic</b><br>ty field for e | ost the<br><b>on (circ</b>            |
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This will open a new window. You can look up the appropriate costing information by clicking on the manifying glass and using the same logic as **Step 6 and Step 7.** 

This information is non mandatory and if it is left blank costing will be defaulted from Payroll information.

|        |                 | Cancel Select      |
|--------|-----------------|--------------------|
| Searc  | h               |                    |
| Co     | ost Centre      | <u>ы</u> Q         |
|        | Resource        | <u> </u>           |
|        | Function        | <u></u> ⊿ <b>Q</b> |
|        | Project         | , ∠ Q              |
|        | Sea <u>r</u> ch | Clear              |
| Resul  | ts              |                    |
| Creat  | e               |                    |
| Select | Code Com        | ibination          |
|        |                 |                    |

9

**10** Once you've inputted the any amended costing information, click **Create.** This will generate the cost code for your claim.

|                 |               | Cance <u>l</u> | Select |
|-----------------|---------------|----------------|--------|
| Search          |               |                |        |
| Cost Centre     | 53102 🔟 Q     |                |        |
|                 | C2K           |                |        |
| Resource        | N 🔄 Q         |                |        |
|                 | Non Delegated |                |        |
| Function        | 53102 🔟 Q     |                |        |
|                 | C2K           |                |        |
| Project         | 0000 🖂 Q      |                |        |
|                 | Default       |                |        |
| Sea <u>r</u> ch | Clear         |                |        |
| Create          |               |                |        |
| Select Code Con | nbination     |                |        |
| 6 52102 N 52    | 102 0000      |                |        |

| 11 | Now click <b>Select</b> to confirm.   |
|----|---|
|    | Search and Select: Cost Allocation  |
|    | Cance <u>I</u> Select   |
|    | Search  |
|    | Cost Centre 53102 ⊾ Q<br>C2K  |
|    | Resource N S Q<br>Non Delegated   |
|    | Function 53102 ⊾ Q<br>C2K   |
|    | Project 0000 N Q<br>Default   |
|    | Sea <u>r</u> ch Clear   |
|    | Results   |
|    | Create  |
|    | Select Code Combination   |
|    | 53102.N.53102.0000  |
|    |   |
| 12 | In Effective Date field please tick <b>As Soon As Possible</b> only.                            |
|    | Effective Date  |
|    | This Transaction Occurs Once.<br>Effective From *   |
|    |   |
| 13 | Once you've completed the form, click <b>Apply</b> (located in the bottom right of the screen). |
|    |   |
|    | Apply Cancel  |
|    |   |

| (a) allows me to use the vehicle o  | n my employer's bu   | usiness.   |   |   |  |  |  |   |   |
|---|--|--|---|---|--|--|--|---|---|
| (b) allows me to accept the mileaç  | je allowance that I a  | am claiming.   |   |   |  |  |  |   |   |
| (c) will meet the cost of any claim<br>parties.   | 3 made against the   | Education A  | uthority by third   |   |  |  |  |   |   |
| (d) will be produced for inspection   | i, by the Education  | Authority, if  | requested.  |   |  |  |  |   |   |
| <ol><li>The journeys claimed for were r<br/>include any home to base travel.</li></ol>  | nade on Education  | Authority bu   | isiness and do not  |   |  |  |  |   |   |
| 3. The stated mileage is correct.   |  |  |   |   |  |  |  |   |   |
| By submitting this claim I confirm  | that I agree to the o  | conditions s   | pecified above.   |   |  |  |  |   |   |
| TIP Claims for the previous tax y   | ar i.e. before 6th Ap  | ril must be ma   | ade before 31st Dece  | amber. If you   | ı have a cl  | aim before this date pleas   | e contact your Payroll O   | ffice.  |   |
| https://vehicleenquiry.   | our vehicle you can<br>service.gov.u   | check using t<br>J <b>K</b>  | .he link provided Web   | isite:  |  |  |  |   |   |
| Future and Ongoing Tran   | sactions   |  |   |   |  |  |  |   |   |
| X ひ P ☆ ▼ III   |  |  |   |   |  |  |  |   |   |
| Effective End Date Ty   | pe Option V  | /alue Units  | Occurrences Stat  | us Update   | e/View D   | elete/Discontinue  |  |   |   |
| As soon as possible Mil   | sage Car Mileage   | GBP  | One 🙀 h   | iew 🥖   |  |  |  |   |   |
| ~   | Awaiting Approval ar   | nd Suspended   | d can not be updated  | or deleted.   |  |  |  |   |   |
| TIP Transactions with status of   |  |  |   |   |  |  |  | Cancel Vie                                      | w History Save For Late                             |
| o add another<br>rocess from S<br>Il unsubmitter  | r day to<br><b>teps 4-1</b><br>d claims  | the s<br>L <b>2.</b>   | ame cla<br>display l  | im, c<br>ike tl                                       | lick<br>he li  | Mileage  | C <b>laims</b> ag<br>e picture l   | ain and repe<br>below.                          | at the prev   |
| o add another<br>rocess from S<br>Il unsubmitte<br>Mileage Claims<br>of TIP Claims for the<br>of TIP Please enter<br>https://vehic  | r day to<br>teps 4-1<br>d claims   | the s<br>L2.<br>will of your w   | display l   | im, c<br>ike tl<br>pril mus<br>n check<br>uk          | he li<br>the li  | Mileage (<br>ines in the<br>ade before 31st<br>the link provided                                     | Claims ag<br>e picture l<br>December. If yc<br>Website:  | ain and repe<br>celow.                          | at the prev   |
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**16** This will provide you with a summary of your claim. Review this information to make sure it's correct.

You'll see one of these for each day you've entered.

|                              | Proposed                            |
|------------------------------|-------------------------------------|
| Туре                         | Car Mileage                         |
| Rate Type                    | Essential                           |
| Claim Start Date             | 01.09.2022                          |
| Claim End Date               | 01.09.2022                          |
| Claimed Mileage              | 40                                  |
| Location From                | EA Office 1, 123 EA street, BT1 1AB |
| Location To                  | EA Headquarters Dundonald           |
| Purpose                      | Office to Office                    |
| Vehicle Reg Number           | ABC 1234D                           |
| Engine Capacity              | 1199                                |
| No of Passengers             | 0                                   |
| Fuel Type                    | Petrol                              |
| rpose of Journey or Comments | Attending meetings at EA HQ         |
| Occurrences                  | One                                 |

If you're entering a summary claim, you'll see one summary of the total miles you entered for the claim period like below.

| Туре                           | Car Mileage                    |
|--------------------------------|--------------------------------|
| Rate Type                      | Essential                      |
| Claim Start Date               | 01.09.2022                     |
| Claim End Date                 | 30.09.2022                     |
| Claimed Mileage                | 300                            |
| Actual Mileage                 | 300                            |
| Location From                  | 1 Test Street Belfast, BT1 1AB |
| Location To                    | EA Head Quarters Dundonald     |
| Purpose                        | Office to Office               |
| Vehicle Reg Number             | ABC 1234D                      |
| Engine Capacity                | 1199                           |
| No of Passengers               | 1                              |
| Fuel Type                      | Petrol                         |
| Purpose of Journey or Comments | Attending Meetings at EA HQ    |
| Occurrences                    | One                            |

|                       | Auditional   | Information  |   |   |  |                                    |                             |                 |
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| 4                     | Attachment Summary                                     | Information  |   |   |  |                                    |                             |                 |
|                       | Desci  | Title Summary of Journeys - Ap   | ril 2023  |   |  |                                    |                             |                 |
|                       | Ca   | legory Miscellaneous   |   | 11  |  |                                    |                             |                 |
|                       | efine Attachment                                       |  |   |   |  |                                    |                             |                 |
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