For Teachers and Principals

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| Submit an Expense Claim |

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| **NOTE** | **Expenses relate to all non-mileage related expense claims. Please ensure all expenses claims are within policy when making a claim. For any queries around policy or expense entitlements, please contact** **EA\_TravelandExpensesTeaching@eani.org.uk****.** **If you are claiming for an Eyesight Test, please follow the TNC guidance set out** [**here**](https://www.education-ni.gov.uk/sites/default/files/publications/de/procedure-for-teachers-tnc2005.pdf)**.****If you are claiming any expenses listed as VATable (e.g. parking, taxi fares), you MUST include a receipt with a VAT number. Credit card receipts are not acceptable.*** **For Principals: please attach evidence of approval from your school’s Board of Governors when making a claim.**
* **For Temporary Teachers: please attach evidence of approval from the school you are charging the expenses to when making a claim. This must come from the school’s Principal.**

**For both of the above, you can upload this with your receipts. This is covered in steps 7-8 of the guide.** |
| **1** | On the Oracle homepage, select the **Teaching Self-Service** responsibility that you have (either Permanent, Principal or Temporary), and then select **Internet Expenses**. This will open the folder. Click **Expenses Home** to open the form.Example of how to select Internet Expenses on the Oracle navigator. |
| **2** | This will take you to the main page of the expenses application. Here you can see reports you have submitted and raise new claims.To raise a new claim, click **Create Expense Report.**Expenses homepage, with Create Expense report circled in centre of screen. |
| **3** | This will open the General Information page. **Starred fields are mandatory.** **IMPORTANT – read the guidance specific to your role*** For **Permanent Teachers** your Approver and Cost Centre should appear automatically. If either/both are incorrect, **do not progress the claim.** Contact the EA One Helpdesk at EAOneHelpdesk@eani.org.uk to get this updated. Once they have corrected this you can proceed.

Example of the General Information Screen for Permanent Teaching staff, with approver automatically assigned.* For **Principals**, the **Approver** field will be blank, and the **Cost Centre** will be your school’s cost centre. Your claim will be routed directly to Accounts for review and approval, so you can leave the Approver field blank.

* For **Temporary Teachers,** the **Cost Centre** and **Approver** fields will be blank. You will need to manually enter the cost code for the school where you are assigned, and the Principal of that school as your approver for audit records. However, your claim will be routed directly to Accounts for review and approval.

To do this, for both fields **click the magnifying glass logo** on each field, which will open a new window. Example of the General Information Screen for Temporary Teaching staff, with prompt on magnifying glass to assign details.Then look up the relevant cost centre/approver using the search function, as demonstrated below. Click **Select** to confirm this.Example of the Search and Select function to look up information such as cost codes. Select is highlighted in the top right. |
| **4** | Enter a **Purpose** for the expense claim. Once the form is filled out in full, click **Next.** Example of a Purpose being entered to General Information in the centre-right of the screen. |
| **5** | This will open a section where you can catalogue the individual expenses in your claim. This is split into rows with **Date, Receipt Amount, Expense Type** and **Justification.**The **Expense Type** field is a dropdown (shown below) that contains a list of approved expense reasons. Some of these have limits, which are detailed out as shown.In our example, we are a non-vatable parking claim.You can also **Save** if you need to return to the form later. Example of Core Expenses selection screen, featuring a drop-down menu of Expense Types. In this example, Car Parking Non-vatable is selected. |
| **6** | Fill out the form as required. When entering the date, ensure it’s in the **DD.MM.YYYY** format. You do not need to enter a **£** symbol when entering the **Receipt Amount** value, just the number.Once you’ve filled out the details on a line, scroll to the right and click the **Details** icon (circled below. Zoomed in example of the Details icon on the right-hand side of the screen. |
| **7** | This will open a detailed view of the claim. You will need to upload a receipt to support the claim. To do this, click the **plus** symbol (circled below). Example of where to click to upload receipts, using the circled green plus logo. |
| **8** | Give your receipt a **Title** and set the **Category** to ‘Receipts’ as shown. Then click the **Choose File** button to upload the receipt file from your computer. This can be in the form of a PDF or image file. Examples of criteria to include when uploading receipts, including Title, Category and File Upload. |
| **9** | Now click **Apply** in the top-right of the screen**.** Example of the Apply button featured in both the top-right and bottom-right of the screen. |
| **10** | You’ll receive a confirmation that your receipt has been uploaded. Now click **Return** to go back to the overall claim page. Example of the Details page, featuring the Return button at the top-right of the screen. |
| **11** | **Repeat Steps 5-10** if you have any additional lines you wish to add to the claim. When you’re ready, click **Next.** Example of where to select the Next button, featured in the top-right of the screen. |
| **12** | This will bring you to the allocations section. If required, you can assign your claim to a specific function code in addition to your cost centre.If the claim is a generic claim to your cost centre, you can leave this as default. If the claim is assigned to a specific function and/or area, you can amend the codes as required in the **FUNCTION** and **AREA** fields shown below. Examples of how to manually amend costing for lines on the expense claim, including Function and Area, both circled on the right side of the screen. |
| **13** | Once you’ve confirmed the costing is correct, click **Next.**Example of where to click the Next button, featured in the top-right of the screen. |
| **14** | This will take you to the submit page. Before you submit, carefully read the **Terms and Conditions in red and check the claim details are correct.*** For Principals and Temporary Teachers, disregard the approver on this page. Your claim will be routed to the Expenses team in Accounts for review and approval.

Once you are ready to submit, click the **Submit** button.Example of the Terms and Conditions and Review page, featuring the Submit button in the top-right of the screen. |
| **15** | You will see a confirmation, letting you know that your claim has successfully gone to your designated approval flow for review.Click **Return** to go back to the main expenses page. Example of the expense submitted confirmation screen, including the Return button to return to the homepage - featured in the centre of the page. |
| **16** | Your claim will appear in the expenses tracker as shown.Example of a submitted expense claim in the expenses tracker. |
| **17** | Once your claim has been approved/rejected, a notification will appear on your homepage letting you know of the outcome. |