iExpenses

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| Submit an Expense Claim |

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| **NOTE** | Please ensure your supervisor is correct on the system before submitting a claim. **DO NOT** submit claims to an incorrect supervisor. To update your supervisor please email eaonehelpdesk@eani.org.uk. You will require confirmation from your Head of Service for this to be amended on the system.**Guidance of specific types of expense claims*****Eye Tests***The Eye Test/Glasses claim form and link is now available.  The form is now on both SharePoint under “For Staff” and the Staff Hub - see links for both below:[Sharepont - Eyesight Test Application Form](https://www.eani.org.uk/sites/default/files/2023-06/EA%20DSE%20Eyesight%20Test%20Application%20form.pdf) [EA Staff Hub – Health and Wellbeing](https://www.eani.org.uk/ea-staff-hub/hr-online/health-wellbeing)Please note that if staff are claiming reimbursement for an eye test or glasses **the attached form will need to be completed and receipt(s) attached to substantiate the claim****---*****Reimbursement of Professional Fees***The Application for Reimbursement of Professional Fees form needs to be completed and receipt(s) attached to substantiate the claim.  The following is a link to the Payment of Professional Fees page, which includes the Professional Fees Policy and application form:[Payment of Professional Fees (eani.org.uk)](https://sharepoint.eani.org.uk/hr/profees/Pages/default.aspx) |
| **1** | On the Oracle homepage, select the **EA Employee Self Service, Education Authority BG** responsibility, and then select **Internet Expenses**.Screenshot of the Oracle navigator, showing the user where to select 'internet expenses'. |
| **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.**Example of how to create a new expenses report on Oracle. |
| **3** | This will open the General Information page. **Starred fields are mandatory.** Your **Name, Default Cost Centre** and **Approver** will load by default, however you can change the cost centre or approver if required.An example of the general information page of an expense report. The starred fields are mandatory. |
| **4** | Enter a **Purpose** for the expense claim. Once the form is filled out in full, click **Next.** Example of how to fill out the purpose of an expense claim. |
| **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 submitting a reimbursement claim for an Eyesight Test, which is capped at £20.You can also **Save** if you need to return to the form later. How to catalogue an expense claim.  |
| **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. Example of how to complete the expense form. |
| **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). The details icon will open up a detailed view of the claim. This is where you will add receipt. |
| **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. Example of how to complete a title and category to receipts. |
| **9** | Now click **Apply.** Once completed, user should select 'apply'. |
| **10** | You’ll receive a confirmation that your receipt has been uploaded. Now click **Return** to go back to the overall claim page. User will then receive confirmation that the receipt has been uploaded. User should then click return to go back to the overall claim page. |
| **11** | **Repeat Steps 5-10** if you have any additional lines you wish to add to the claim. When you’re ready, click **Next.** User should complete steps 1-5 again for any other claims. |
| **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. Example of the allocations section. You can assign the claim to a specific function code, or if generic just leave as default. |
| **13** | Once you’ve confirmed the costing is correct, click **Next.**Once user has confirmed costing information, user should select next. |
| **14** | This will take you to the submit page. Before you submit, carefully read the **Terms and Conditions in red, ensure your approver is correct and check the claim details are correct.**Once you are ready to submit, click the **Submit** button.Example of the terms and conditions displayed in red on Oracle. Users should read carefully. |
| **15** | You will see a confirmation, letting you know that your claim has successfully gone to your designated approval for review.Click **Return** to go back to the main expenses page. Following submission, user should click return to go back to the main expenses page. |
| **16** | Your claim will appear in the expenses tracker as shown.Example of how to view submitted expense reports. |
| **17** | Once your claim has been approved/rejected, a notification will appear on your homepage letting you know of the outcome.**NOTE – if your line manager does not have spending authority, the request will be forwarded on to the next person in the hierarchy to review the claim.**Example of how to track your claim on the Oracle homepage for manager approval / rejection. |