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](mailto: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. |