

Logging In

Logging in to the website

Website Address: www.sel-expenses.com

Company ID: NHSWales

Username: Your Employee Number

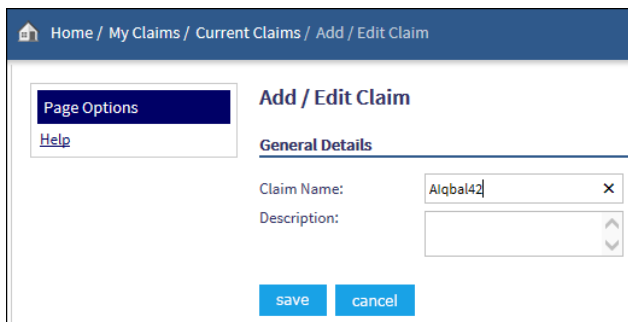
Password: As per the initial set up

Adding Expenses

Please note: **All journeys MUST start at your home or current place of work.**

How to create a claim

1. When you login for the first time you will need to create a claim in which your monthly expenses will be saved. On the homepage click on “Add New Expenses” and the following screen will appear.



The screenshot shows a web application interface for adding or editing a claim. At the top, a breadcrumb trail reads: Home / My Claims / Current Claims / Add / Edit Claim. On the left, there is a sidebar with a 'Page Options' button and a 'Help' link. The main content area is titled 'Add / Edit Claim' and contains a 'General Details' section. This section has two input fields: 'Claim Name' with the value 'Alqbal42' and a clear button (X), and 'Description' which is currently empty. At the bottom of the form are two buttons: 'save' and 'cancel'.

The system will automatically generate a Claim Name when a new claim is being created and in the Description field enter the period of the dates claiming for. **Click Save.**

After you submit a claim you will need to create a new one for the following month by repeating this process.

How to add expenses

1. On the “Add/Edit Expense” page enter the date that the expense was incurred into the Date field or select it from the calendar.

Please ensure you change the type of expense in the approval Group/Expense breakdown section, this will determine the approval route of your claim:

- **Junior doctor relocation** (Please ensure that you have submitted your application form prior to submitting your first claim for each academic year when making claims, receipts must be attached for all expenditure) – Claims are approved by the expense department
- **Junior doctor Excess Travel** – Please ensure that you have submitted your application form prior to submitting your first claim for rotation, claims are approved by the expense department
- **Study leave** - goes through to Post Grad Manager (ensure you choose the correct hospital where you have been based) for GPST please choose 043 - Study Expenses (GP Trainee Practice)
- **Business Expenses** – claims are approved by the line manager
- **GP Practice (Business Expenses)** – for GPST only – claims are approved by the practice manager, please type GP in the ‘Type of Expense’ and select the relevant practice

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My Expense Items

Select an item below to add it to your expense sheet:

- ☐ Accommodation
- ☐ Accommodation-Non .
- ☒ AFC - Pedal Cycle Milk
- ☒ AFC Covid Redeploy.
- ☒ AFC On Call
- ☐ AFC On Call (DoC)
- ☐ AFC Public Transport.
- ☐ Bus/Tram Fares
- ☐ Business Mileage - B.
- ☐ Business Mileage OS.
- ☐ Business Mileage AFC
- ☐ Business Miles - Sal.
- ☐ Business Miles AFC (-
- ☐ Business Miles M&D
- ☐ Business Miles M&D-
- ☐ Business Miles M&D(-
- ☐ Car Hire
- ☐ Car Parking
- ☐ Congestion Charge
- ☐ Course Expenses
- ☐ Course Fees

Add Expense

General Details

Date: 17/08/2020 ? Claim: LEvans101 ?

Reason: ?

Other Details: ?

Approval Group / Type of Expense Breakdown

Approval Group	Type of Expense	Percentage
Junior Doctor OSO - BCU East	Junior Doctor Relocation X	100

Meals-Breakfast Your Limit: £5.00

Receipted cost up to locally agreed maximum.

If you are claiming for an additional person you must provide the other employee details in the "Other Details" section.


Number of Directors: ?

Number of Employees: ?


***Please note if the correct expense type is not updated this could result in the expense claim going to the wrong approval route and could delay payment.**

2. Select a reason from the list.
3. Select an expense item from the list on the left side of the page by ticking the box. You can select multiple items, e.g. if you are claiming rent and mileage then both boxes can be ticked as long as they relate to the Date you have input in.


How to copy and paste an expense item

1. On the "Claim Details" page click on the  icon on the same row as the item you want to copy. This will open the "Copy Item" page and allow you to change the date of the item whilst keeping the rest of the information the same. This is ideal for repeat journeys/expenses.


How to edit an expense item

2. On the "Claim Details" page click on the  icon on the same row as the relevant item. If the incorrect expense item was used then you can select the correct one from the list box on the "Add/Edit Expense" page.

How to delete an expense item


1. On the "Claim Details" page click on the  icon on the same row as the relevant item to delete the single expense item. You will receive a prompt so that the item is not accidentally deleted.

How to view the journey steps on a mileage item


On the "Claim Details" page click on the  icon on the same row as the relevant item to produce a pop-up that will details the journey for that date. There is a close button you can click on once you have finished.

How to upload a receipt on the website

If you do not have the facility to upload, the paper receipt can be submitted to your manager but clarify this with them first. The Expenses Department no longer require receipts to be submitted to them.

1. On the "Claim Details" page click on the  icon on the same row as the relevant item.
2. On the "Manage Receipts" page click on the expense item that you want to upload the receipt to.
3. Browse and select the file that requires uploading. This can be an image file, a PDF document, Word, Excel etc.
4. Once you have selected the file it will be uploaded automatically. Click 'Save' on the page.

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5. On the “Claim Details” page the icon will now change to  and you can click on this to view the receipt.

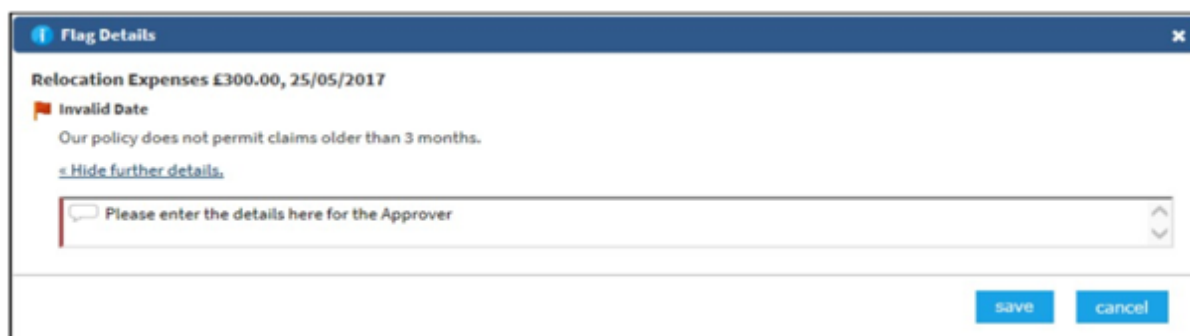


Date of Expense	Expense Item	Reason	Other Details	Number of Miles	Amount Payable
25/08/2017	Relocation Mileage	Junior Doctor Relocation		144.08	£34.58
25/09/2017	Relocation Expenses	Junior Doctor Relocation			£300.00
25/09/2017	Relocation Travel	Junior Doctor Relocation			£6.70
				144.08	£341.28

7. Select “New Expense” under “Page Options” to enter expenses for a new date and repeat from Step 2.

Flags and Limits

An expense items will be flagged on your claim if it is over 3 months old at the point of entry or submission and we will require additional details before you are able to proceed:



The pop up box will automatically when you save an expense that is flagged. Complete the further details and click Save.

How do I Claim Excess Travel

Please see the guide below on claiming Excess Travel. This also includes details on how to calculate your Excess entitlement on days you do not travel directly to or from your current hospital placement.

If you are claiming Public Transport Fares then you will need to upload receipts and only claim the difference in cost between your base hospital and current placement

1. How do I claim from home to my current hospital placement (R)

- I. In your expense items on the left side of the screen there will be an option to select **Relocation Excess Travel**; tick this box. Ensure that the “Date of Expense” is the first day you are claiming for.

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- II. The section below will appear featuring your personal car details and the amount of mileage you are entitled to per single journey.



The screenshot shows a form with the following fields and options:

- A dropdown menu at the top left.
- A dropdown menu labeled "Medical Public Transport" with a plus icon and the text "Add new vehicle" next to it.
- A "Mileage:" label followed by a text input field and a blue question mark icon.
- A "Claim Allowance:" label followed by a checkbox and a blue question mark icon.
- A "Number of Allowances:" label followed by a text input field and a blue question mark icon.
- An "Excess Claim Start Date:*" label followed by a date input field, a calendar icon showing "12", and a blue question mark icon.
- An "Excess Claim End Date:*" label followed by a date input field, a calendar icon showing "12", and a blue question mark icon.

- III. Tick the 'Claim Allowance' box.
- IV. Number of Allowances: A single allowance is one journey undertaken; on a single day you would be entitled to two allowances on your commute to and from your current hospital placement. You can enter a whole month's worth of journeys and enter corresponding dates as detailed below
- V. Excess Claim Start Date: Enter the first date of the period that you are claiming for.
- VI. Excess Claim End Date: Enter the last date of the period that you are claiming for.

N.B Please note that the mileage in the box will always remain at the distance for a single journey. Once you have saved the claim the total amount due will be displayed in the Claim Details screen.

2. What if I do not travel from home directly to my current hospital placement (and vice versa) or what if I do not travel to my current hospital placement at all?

- I. Input your journeys as Medical Business Mileage (or relevant item) on your non-Relocation expense account, ensuring the start and finish points are at your home address.
- II. Click Save and on the 'Cl

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- III. Tick the 'Claim Allowance' box.
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- V. Excess Claim Start Date: Enter the first date of the period that you are claiming for.
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- I. Input your journeys as Medical Business Mileage (or relevant item) on your non-Relocation expenses account, ensuring the start and finish points are your home address.
- II. Click Save and on the 'Claim Details' page click on the 🚗 icon to obtain the mileage figures required for the calculation below:
- III. Calculate the following:
Recommended Distance minus Reimbursable Distance minus Home to Base Hospital Distance

The resulting figure will be claimed using the **Relocation Excess Travel (Variable)** expense item.

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Claiming Relocation costs

This option will only be enabled on your account upon receipt of an application form




<https://forms.office.com/r/v2w3Yni1Sg>

1. There are 2 options relocation cost and relocation rent excess and excess allocation, these can be found on the left hand side under my expense items – receipts must be provided.

JD Relocation Expenses


Please complete all fields below and ensure individual items are recorded on separate expense items. This item can be used to claim the following:

- Estate Agents Fees
- House Contents Removal Costs
- Induction Period (Overnight Subsistence - £55 maximum per night)
- Land Registry Fees
- Legal Fees
- Preliminary Visit (Overnight Subsistence - £55 maximum per night)
- Search Fees
- Search For Accommodation Allowance
- Stamp Duty
- Storage of Furniture Costs
- Survey Fees
- Tenancy Agreement Fee

Do you have a receipt: ☐ Yes ☐ No 

Total (Gross): 


Did you lose this receipt?: 


Relocation Expenses Description:* 


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JD Relocation Rent Allowance/Excess Rent

Please note that evidence must be provided before this allowance can be reimbursed. . This item is taxable in line with HMRC regulations.

Do you have a receipt: ☐ Yes ☐ No 

Total (Gross): 

Did you lose this receipt?: 

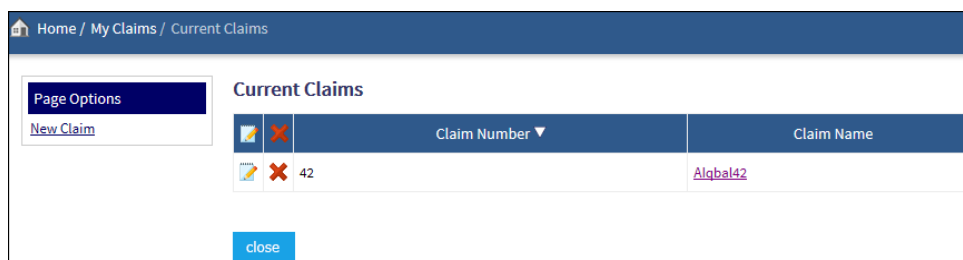
Relocation Rent Allowance Type:* 

Submitting Claims

We recommend one claim to be submitted per month (or two if you have a study leave claim as well), containing expense items from the first to the last day of the calendar month. Claims will need to be submitted by your last working day of the month.

How to access the claim from the homepage

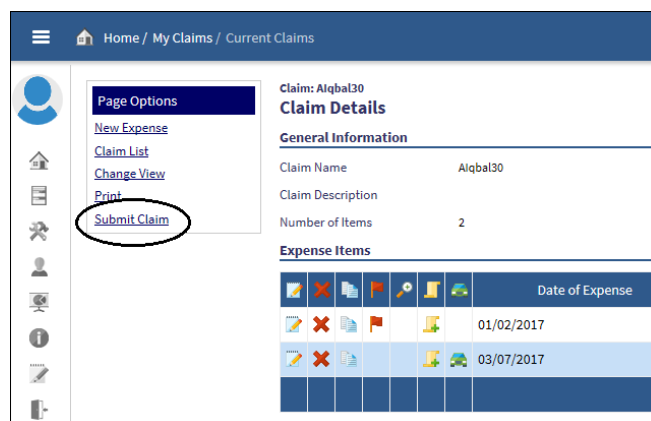
1. Click on *My Claims > Current Claims* and ensure you click on actual claim name (Alqbal42 in the example):



How to submit the claim

1. On the Claim Details page select “Submit Claim” under the Page Options on the left side of the page.

Please note: If you have any flagged expense items then you may be asked to provide further detail if this has not already been provided.



2. Read the declaration and click “I Accept”.

3. The Claim Details page will now be updated with a Claim History section and the approver will receive an email asking them to approve the claim.

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How to unsubmit the claim

1. On the Claim Details page click on the “Unsubmit Claim” option. This can only be used if the approval has not begun the approval process, otherwise a message will appear to prevent you from doing so.

Warning: There is no warning message when you attempt to unsubmit the claim so please take care not to click this by mistake.