

## [MyView Expenses & Mileage – FAQ's](#)

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### 1. How often should I complete a mileage or expense claim?

- One claim should be submitted per month and not a form for each claim date. The **save for later** option should be used to enable you to add more dates throughout the month.
- When you have entered all claim dates for the month click **submit** to send this to your manager for authorisation.

### 2. What should I enter in the main claim description box?

- In the description field enter the month and year relevant to the claim i.e. October 2018.
- This will make it easier for authorising and checking historic forms.

### 3. I have two posts. How do I claim for the relevant post?

- When you create a new claim you can select the post that you want to claim for from the drop down list.
  - Click on **My Claims**
  - **Create Mileage/Expenses Claim**
  - The create expense claim form will appear
  - The **Position** field will appear.
  - If you have more than one post the drop down can be used to select the appropriate post

### 4. What do I do with my mileage and expenses receipts?

- Claim receipts can now be uploaded directly into MyView and attached to the claim.
- MyView will accept a scanned copy receipt or a photograph of a receipt. When you have scanned or taken the picture of the receipt you will have to save this in a temporary location to then upload into MyView.
- For **mileage claims** the receipt can be attached to the main claim. There is no requirement to attach a petrol receipt to each individual mileage line.
- For **expenses** the receipt should be attached to each individual line.

## 5. How can I check if my claim has been authorised?

- The **My Mileage/Expenses History** option can be used to check the status of your claim
- The status of the form can be seen clearly in the status column.
- Forms which has been authorised will have **Authorised** in green text in the status column
- Forms which have not been processed yet will have **Submitted** in orange text in the status column
- You will also receive an email when your claim has been authorised.

## 6. Can I tell who has authorised my form/who it is sitting with for action?

- The **My Mileage/Expenses History** option can be used to check who has authorised a claim or who a claim is with for action.
- A list of all claims will appear. The status field will indicate if they have been authorised or are still submitted and awaiting action.
- To check a particular claim click on the form name under **Description**
- The details of the claim will appear.
- In the top left hand corner is a section called **Authorisation Progress**
- The status will be green if authorised and orange if submitted and awaiting action
- Click on the green/orange round button to view the authorisation status details
- If the form has been authorised/rejected details will appear to show who the authoriser was and the date and time processed.
- If the form is pending authorisation the status will show which manager the form is sitting with for action.

## 7. I have a claim form with the status “Mixed”, what does this mean?

- The expenses and mileage module allows managers to partially authorise a claim form rather than having to reject the whole claim if there is an issue with an individual line(s).
- If a claim form has been partially authorised it will have a status of **Mixed**
- When a claim form has been partially authorised you will receive an email to say your claim has been rejected. The rejection notes should mention that only part of the claim has been rejected.
- To check a partially authorised claim click on **My Claims**, then **My Mileage/Expenses History**
- Look for the claim which has the status **Mixed** and click on the form name
- The claim form will have been split into two sections – **rejected** and **authorised**
- Under the rejected section click on **Reopen** and use the **Edit button** to amend as necessary

- When you are happy that the line has been amended accordingly click on **Submit** to resubmit the amended line.
- The lines which has already been authorised will not be resubmitted.

#### 8. I have submitted my claim in error what can I do?

- If you have submitted a claim form in error you can withdraw this as long as the form has not been authorised. When a form has been authorised it can no longer be withdrawn
- Click on **My Claims**, then **My Mileage/Expenses History**
- The form history page will be displayed
- Click on the form name under **Description** to open the relevant form you wish to withdraw
- Click on the **Withdraw** button which appears at the right hand side of the form
- The status will change from **Submitted** to **Open**
- The form can now be amended as necessary and submitted or saved for amendment at a later date
- If your claim form has already been authorised you should speak to your manager and contact the payroll department ([payroll@falkirk.gov.uk](mailto:payroll@falkirk.gov.uk)) to explain a claim has been submitted in error.

#### 9. I have changed post and forgot to submit a claim against my old post – what can I do?

- The expenses and mileage module has been enhanced to allow you to submit a claim against a previous post.
- The claim must be submitted within 3 months of leaving the post.
- To do so please ensure you select the correct post in the **Position** field when creating your claim.
- The claim will go to your previous manager and you may wish to contact them in advance to explain the reason for the late claim.

#### 10. How far back can I claim?

- Claims should be submitted on a monthly basis. A claim for November should be submitted in December.
- In exceptional circumstances, claims submitted more than two months after the end of the calendar month to which the claim relates will only be paid if authorised by the Chief Officer, and accompanied by a memo from the Chief Officer outlining the reason for the delay.

## 11. What happens if my claim is not authorised or rejected?

- Your manager has 10 days to authorise your claim. If your claim is not authorised or rejected within this time, it is then escalated to the next level of management for action.
- If they do not authorise your claim within 7 days, your claim will be returned to you and you will need to re-submit it.

## 12. How do I authorise part of a claim form?

- A manager can either reject the whole claim or individual lines.
- The manager should add comments detailing why it has been rejected for the employees information.
- To authorise or reject a whole claim use the green **Authorise All** or red **Reject All** buttons
- To authorise part of a claim form the green tick should be used next to each individual line.
- To authorise a line use the **green tick**
- To reject a line use the **red cross**
- The rejection notes field should be used to explain why the particular line has been rejected.
- The employee will receive an email to say the claim has been rejected.
- The form will then have a status of **Mixed**