



North Lanarkshire Council



myTeam Mileage, Expenses & Overtime Guide

Version Control

Version	Date Completed	Author	Description
0.1	17/05/2019	Gavin Scott	Draft Pilot User Guide
0.2	17/07/2019	Gavin Scott	Updates
0.3	27/09/2019	Gavin Scott	Updates
0.4	28/10/2019	Gavin Scott	Document updates
0.5	21/08/2020	Amiee McGarrell	Vehicle Insurance and driving licence checks added
0.6	17/09/2020	Rhiannon Chisholm	Flu Vaccination Refunds
0.7	27/04/2022	Amy Dale	Updates to screenshots and added in guidance on vehicle insurance verification process.
0.8	07/03/2023	Christopher Tollan	Updates to reviewing driver licence details and vehicle insurance information

Version Control History

Document Name: mySelf Mileage, Expenses & Overtime Guide

Reviewed & Approved By:

Job Title	Name	Date	Version Approved
Workforce Systems Development Lead	Mark Lennon	Aug 20	Version 5
Senior HR Operations Advisor	Rhiannon Chisholm	September 2020	Version 6
Workforce Systems Development Lead (Acting)	Nichola Millen	May 2022	Version 7
Senior Workforce Engagement and Website Administration	Murray Hargrave	March 2023	Version 8

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1. Overview

This guide is for authorised signatories who have a responsibility for authorising claims for mileage and overtime.

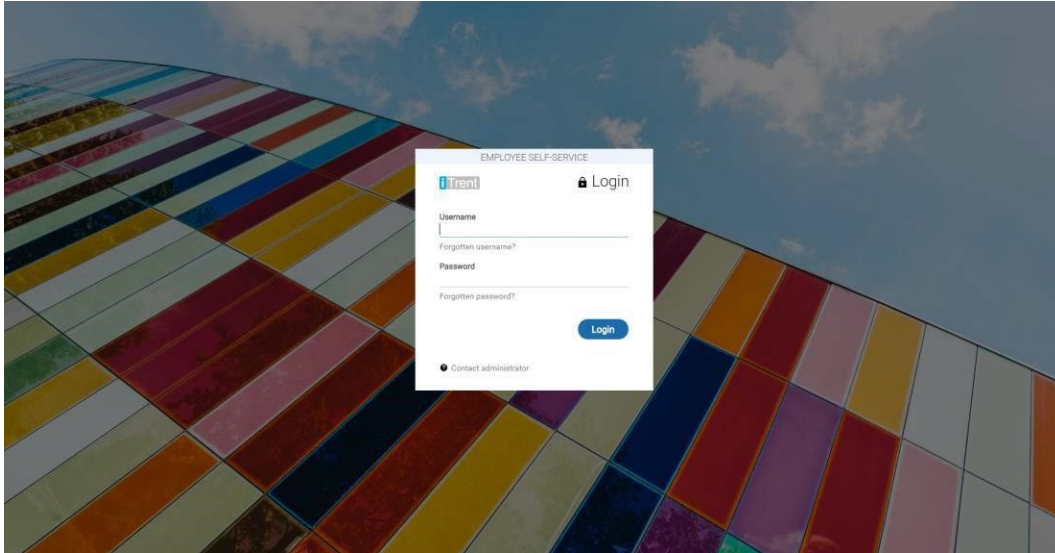
This guide will take you through the process of reviewing overtime/allowance, mileage/subsistence claims and how to authorise or reject them, as well as reviewing and updating an employee's driving licence and vehicle insurance information. It also, confirms how to process reimbursements for spectacles and eyesight tests. Once authorised, the claims will be automatically entered into the iTrent system for payment.

You should be aware that:

- You will only be able to authorise claims if you are listed as an authorised signatory.
- You must be aware of your authorisation limits. The system will not prevent you from authorising claims, but you will appear on an audit exceptions report if you authorise amounts greater than you are authorised for.
- You should not redirect claims to staff who are not on the authorised signatory list.
- Claims can only be authorised [when payruns are open for processing](#). This is a system limitation and cannot be changed.
- Once a claim has been authorised, it cannot be changed. If there are errors then the manager/employee should contact the Employee Service Centre.

2. Logging into iTrent

Go to https://ce0076li.webitrent.com/ce0076li_web/wrd/run/etadm001gf.open and log in.



You will then be presented with the home page for myTeam.



To view requests for Overtime or mileage, click on your to do list.

3. The To do List

Your To-do list shows all outstanding requests for leave, overtime, mileage and learning.



TO DO LIST (5) PROCESSES (0) ✕

Filter **All active** Sort by **Due date**

Select all

- Other absence details Mrs Test Teacher - 4036248 * St Stephen's Primary School - Teachers * Start date: 11/02/2019 * End date: 11/02/2019 * Due: 08/02/2019
 REQUIRES AUTHORISATION [More...](#) >
- Other absence details Mrs Test Teacher - 4036248 * St Stephen's Primary School - Teachers * Start date: 25/02/2019 * End date: 25/02/2019 * Due: 08/02/2019
 REQUIRES AUTHORISATION [More...](#) >
- Time & Expenses claim Miss ASNA Test - MILNT00000102 (0416FO) * Help Desk * NLC - Employee Travel and Subsistence (Infrastructure) * Due: 11/02/2019
 REQUIRES AUTHORISATION [More...](#) >
- Time & Expenses claim Mrs Test Clerical - MILNT00000709 (0407FW) * Abbronhill Primary School & Nursery Class - Single Status * NLC - Overtime Claim Form (Infrastructure) * Due: 11/02/2019
 REQUIRES AUTHORISATION [More...](#) >
- Time & Expenses claim Mrs Test Teacher - MILNT00000005 (0410MO) * St Stephen's Primary School - Teachers * NLC - Employee Travel and Subsistence (Teaching Staff) * Due: 11/02/2019
 REQUIRES AUTHORISATION [More...](#) >

To review the details of any request, click on the arrow on the right of the request.

4. Reviewing Overtime Claims

If you have staff who can claim overtime, they can do so by following the steps below:

Once you have clicked on the arrow, you will be taken into the Overtime claim detail. Here you can review or amend the claim, update cost centres, and authorise the claim.

Time & Expenses claim NLC - Overtime Claim Form (Infrastructure) MENU
⌂ ⚙️ 🗑️

1

Employee: Mrs Test Clerical

Job title: Clerical Assistant

Reference: MILNT00000709

Payroll: 0407FW

2

Authorisation

User name: 4285184

Authorisation status*

Reason

3

Page 1 | Page 2

Any Overtime you have incurred (whilst on Council business) should be claimed through the payroll system using this claim form as follows:

1. Select from drop down menu type of overtime being claimed e.g Additional Basic.

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2. Select date overtime was incurred from the calendar below.
3. Enter the reason for overtime claim e.g Sickness cover, vacancy etc.
4. Enter start and finish times for overtime worked.
5. Cost Code - Do not enter - for Managers use only.
6. Enter the number of hours worked.
7. Once completed click 'Submit' to forward this claim to your Authorised Signatory for approval.

To claim for allowances click on 'Page 2' above.

5

Element	Date	Reason for Claim*	Start Time	Finish Time	Cost Code	Number of Hours
Additional Basic	<input checked="" type="checkbox"/> 04/02/2019	<input type="text" value="test"/>			Etest	10.00
	<input checked="" type="checkbox"/>	<input type="text"/>				
	<input checked="" type="checkbox"/>	<input type="text"/>				
	<input checked="" type="checkbox"/>	<input type="text"/>				
	<input checked="" type="checkbox"/>	<input type="text"/>				
						10.00

6

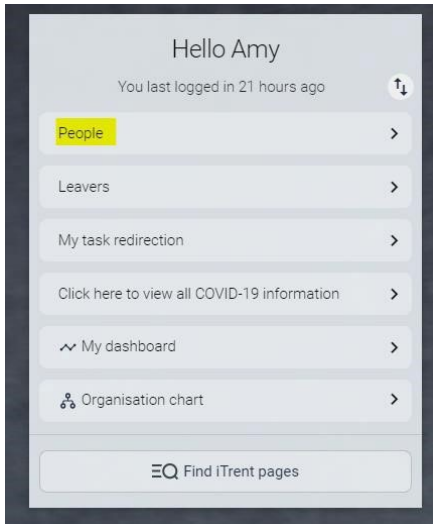
SAVE

1. This section provides basic information on the employee who the claim is for.
2. This section allows you to authorise or reject the claim. Information can be entered in the reason box if further explanation is required.
3. This section allows you to view the different information. Page 1 shows overtime hours claimed and Page 2 shows cash allowances claimed.
4. This section provides basic information on how to complete the form.
5. This section contains the claim information from the employee which they are asking you to authorise. **In this area you can add an alternative cost code if required. If the cost code is left blank, then it will default to the employee's own cost code. (The cost code is also known as the cost centre).**
6. This section contains the SAVE button and will confirm any changes you make.

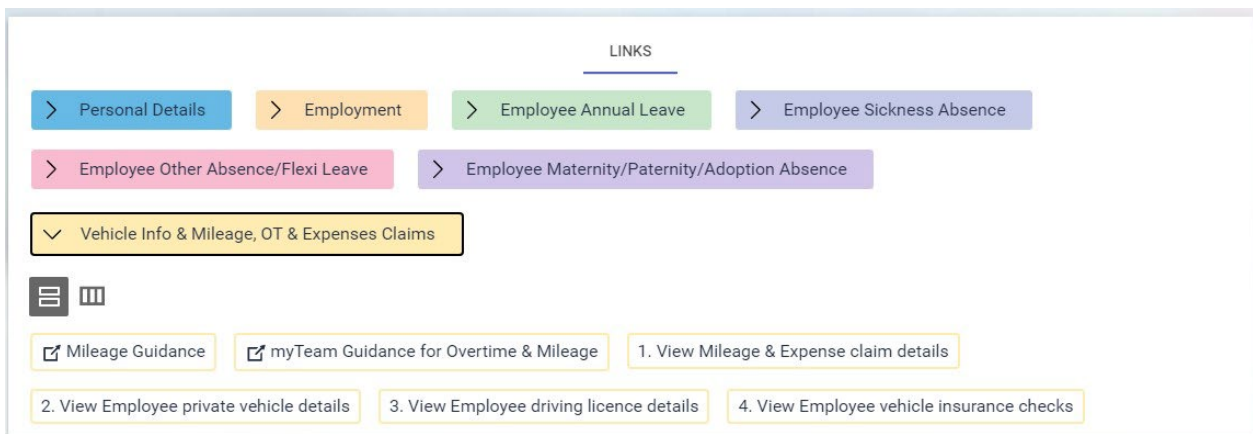
5. Reviewing Driving Licence Details and Vehicle Insurance Information

Before authorising an employee’s mileage, you need to ensure that the system has up to date details of the driving licence. You can do this by following the steps below:

Go to https://ce0076li.webitrent.com/ce0076li_web/wrd/run/etadm001gf.open and log in. On the home page, select ‘People’ and then search for the employee whose details you would like to update.



To add/review **driving licence details**, select the employee’s record and select the “View Employee driving licence details” link under “Vehicle Info & Mileage, OT & Expenses Claims”





Driving licence details New ▼ MENU ↻ 🖨 📎

Licence details

Name on driving licence _____

Valid from _____ 📅

Valid until • _____ 📅

Date verified _____ 📅

Licence number _____

Licence categories A,B,BE,C1,C1E,D1,D1E

Issuing country United Kingdom ▼

Disqualified

Currently disqualified

Start date _____

End date _____

SAVE

Complete all of the information required above and select **SAVE**.

To add/review **vehicle insurance information**, select the employee's record and click on

▼ Vehicle Info & Mileage, OT & Expenses Claims

and then select

4. View Employee vehicle insurance checks

Complete the information required below and select **SAVE**. You should enter the valid until date, press save, and then this will allow you to enter the date verified.

Miscellaneous details ▼ MENU ↻ 🖨 📎

Vehicle insurance

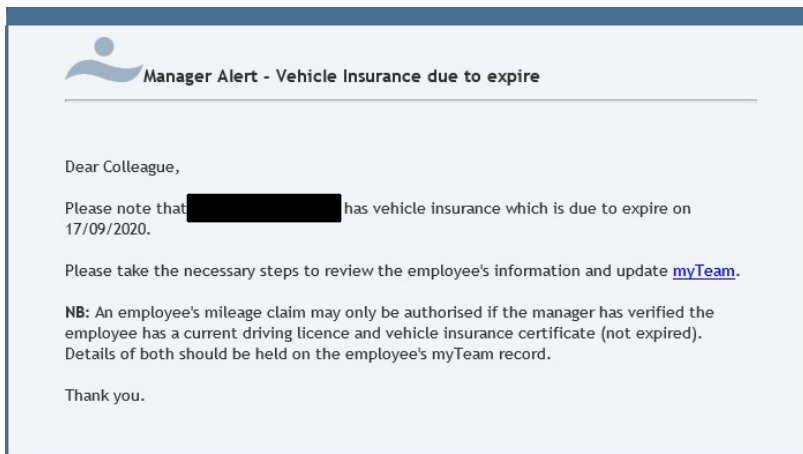
Valid until _____ 📅

Date verified _____

You will no longer be required to add a copy of the insurance certificate.

When the vehicle insurance date is due to be reviewed, you will be reminded by email 28 days in advance of the expiration date.

An example of the email is shown as follows:



Please ensure the steps are followed as per the instruction on the email.

No claims can be authorised if an employee does not have a valid driving licence / vehicle insurance certificate has expired.

6. Reviewing Attachments - Mileage & Subsistence Claims

Please note, that this form should not be used to claim excess mileage.

Reviewing a mileage & subsistence claim is very similar to reviewing an overtime claim. The main difference is that there may be receipts and other documents attached to this form.

Time & Expenses claim NLC - Employee Travel and Subsistence (Teaching Staff) MENU

Employee: Mrs Test Teacher

Job title: Head Teacher (Primary)

Reference: MILNT00000005

Payroll: 0410MO


Authorisation

User name: 4285184

Authorisation status:

Reason:

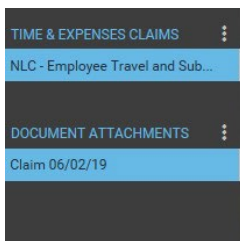
If there are any attachments to view, then the paperclip symbol in the top right hand corner of the claim form will be highlighted blue.

To view attachments, click on the paperclip . A sub menu will now appear.

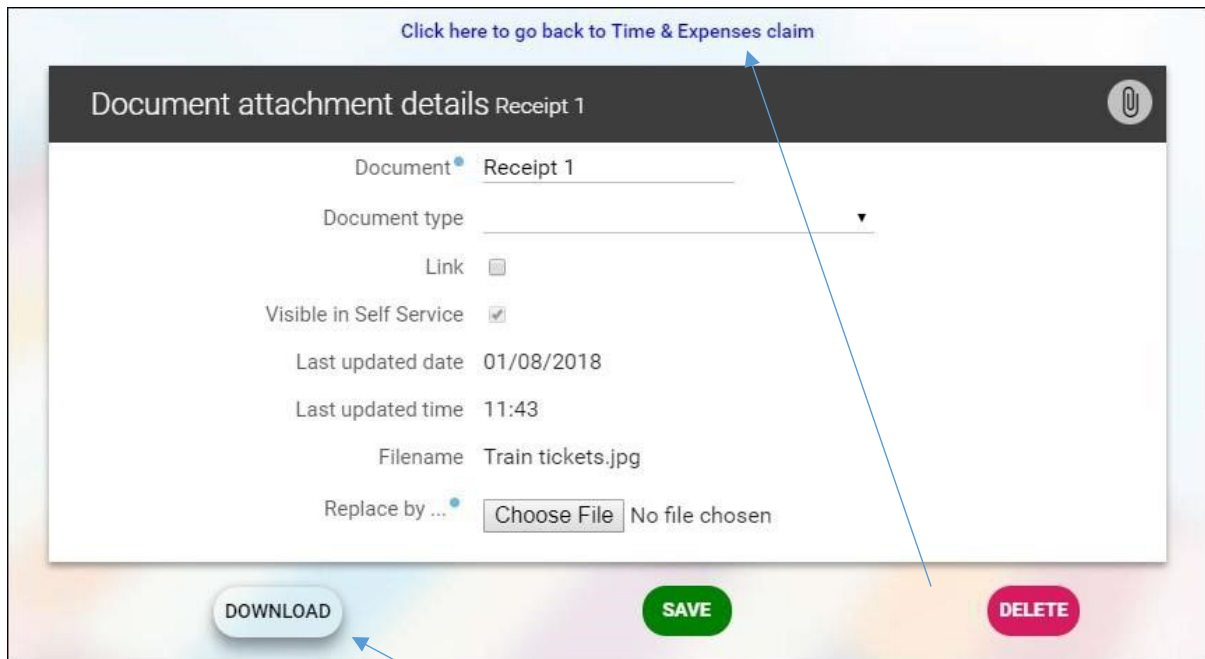
- Document attachments
- Notes
- Print this page
- Refresh this page

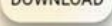
Click on the Document attachments option.

One the left hand menu, a list of attached documents will now be displayed.



Click on the document that you wish to view. You will now be presented with information regarding the document.



To view the attached document, click on the  button.

Once you have reviewed the attached documents, you can then return to the claim by clicking on the link at the top of the screen.

7. Reimbursement for Spectacles / Eyesight Tests

Claims for reimbursement for glasses can now be made via mySelf and can be authorised by the manager in myTeam. Managers should only authorise any claims for reimbursement: -

- Once a HR/DSE1 form has been completed and signed by an optician and they have ascertained that glasses are deemed necessary solely for the use of D.S.E.
- The total value to be reimbursed must not exceed £50. An employee may purchase glasses at a higher price on the understanding that the difference is paid by the employee. A manager can only authorise up to a maximum of £50 or less if the value of the spectacles is less than this.
- When an expense form is completed on myself. Monies should be claimed using **element code 458 (titled Eye Test / Specs)**.
- If receipts are presented.

Further guidance and the form can be found by following the link below:-

<http://connect/index.aspx?articleid=5875>

[Employees will be reimbursed by completing page 2 of the Time and Expenses claim form and using the element code listed above.](#)

8. Flu Vaccination refunds

An employee will now be required to process their flu vaccination refunds via mySelf. The refund request will be sent to the authorising manager for approval. You will receive this request via email. You will then be required to log into myTeam and follow Section 6 & Section 9 of this guide to action the request.

Before approving the request, please ensure the below checks are carried out:

- Please ensure the claim states it is a flu vaccination refund. If the employee has selected the incorrect claim form, the claims should be rejected.
- Location stated where the employee received the flu vaccination.
- Cash amount format is correct. For example, 20.00
- The attachment to view the receipt has been uploaded and the amount the employee is due to be refunded is the same amount on the claim form.

Once all the above checks have been carried out and the claim is accurate, it can then be approved for payment. The refund will be processed to the employees payslip. The refund is subject to a tax deduction which will be calculated by the Payroll & Pensions team.

The employee will receive an email of confirmation when the claim has been approved or rejected.

Please note, claims can only be actioned when the payruns are opened. Please refer to the pay schedules [here](#).

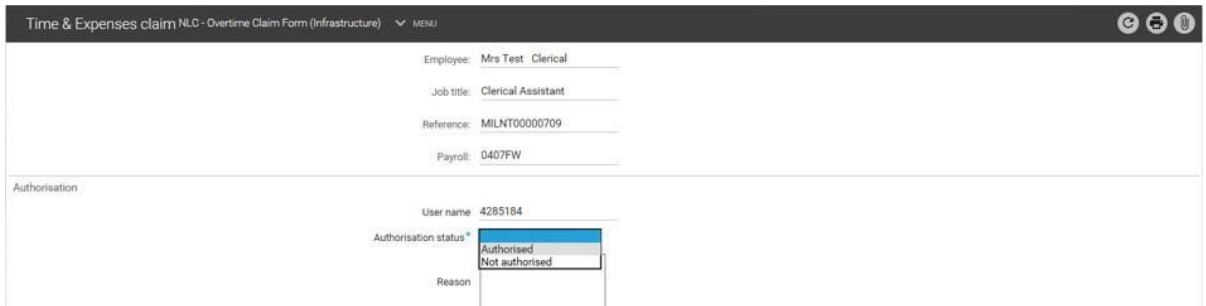
9. Authorising a Claim

Please note, that due to a limitation of the iTrent system, you can only authorise claims for mileage and overtime when the payruns are open. A timetable of availability can be found [here](#).

If you authorise a claim when the payrun is closed, your to-do list will refresh and the claim will remain un-actioned.

There are two ways to authorise either a mileage, overtime or subsistence claim form:

1. When reviewing the claim form, Section 2 of the form allows you to authorise or reject the claim.



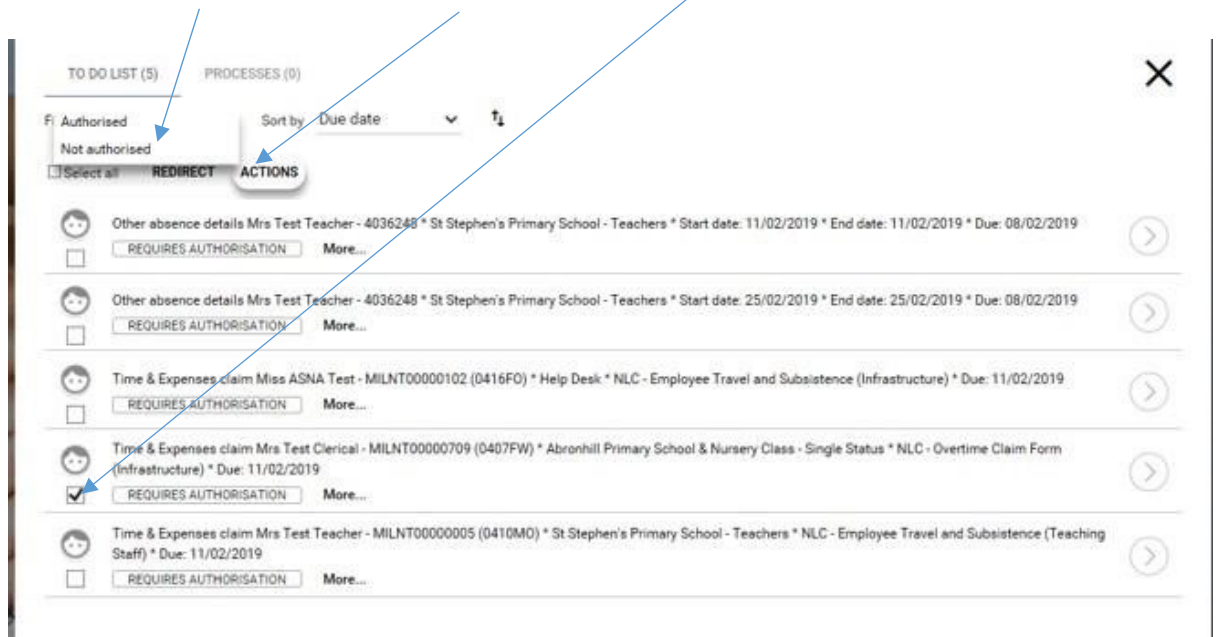
The screenshot shows a web form titled "Time & Expenses claim NLC - Overtime Claim Form (Infrastructure)". The form displays the following details:

- Employee: Mrs Test Clerical
- Job title: Clerical Assistant
- Reference: MILNT00000709
- Payroll: 0407FW

Under the "Authorisation" section, the "User name" is 4285184. The "Authorisation status*" dropdown menu is open, showing two options: "Authorised" (highlighted in blue) and "Not authorised". Below this, there is a "Reason" field.

Once you have picked the authorisation status, click on the **SAVE** button found in section 6 of the form.

2. Alternatively, when you open your to-do list, you can tick any requests in your list and



authorise or reject by using the **Actions** button at the top of the list.

Once actioned, the task will disappear from your to-do list. The employee will receive an email detailing the outcome.



10. Further information

If you require further information, please liaise with your reporting manager or by contacting the Employee Service Centre People Helpdesk Team on 01698 403151 or by [email](#).



[END OF GUIDANCE NOTE]