

Employee Guide - Submitting Expenses

Welcome to the *Employee Guide for Submitting Expenses* in iTrent. This guide provides clear, step-by-step instructions for submitting various types of expense claims, including general expenses (such as eye tests, rail fares, and parking) and mileage claims (with or without passengers).

Whether you're submitting a routine claim or navigating the system for the first time, this guide will help you complete your expense claims accurately and efficiently.

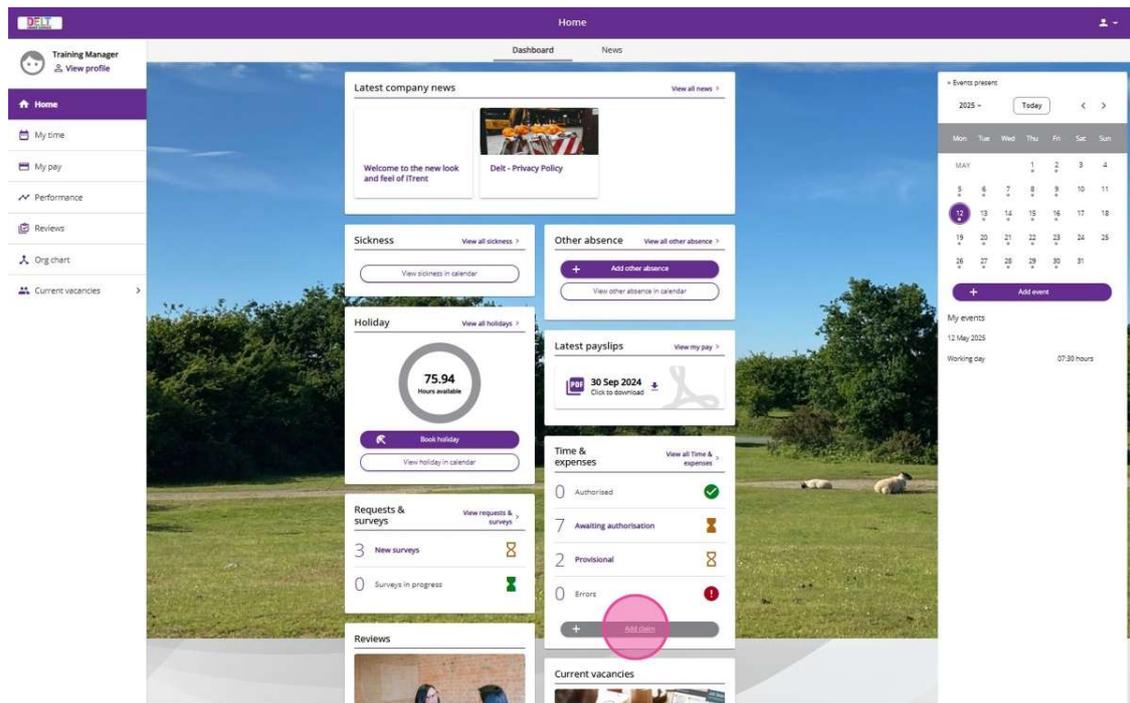
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Adding a Claim (Eg. Eye Test)

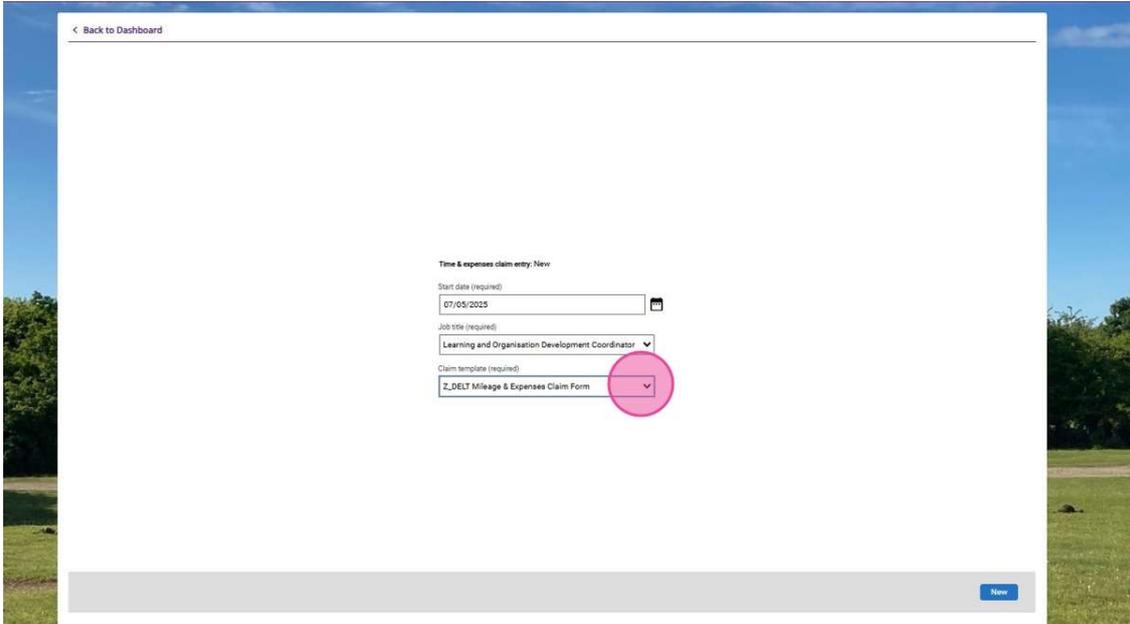
1. Follow these simple steps to submit an expense claim in iTrent. This section of the guide covers general expenses like eye tests, parking, and rail fares. **Mileage claims without passengers follow a different process.**

From your iTrent **Employee Dashboard**, scroll to the **Time and Expenses** section. Click **“Add Claim”** under the Time and Expenses box.

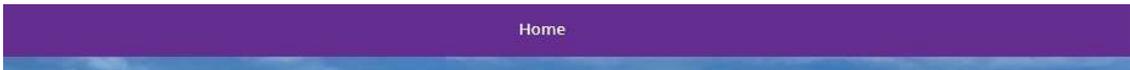


2. The expense claim form will open.
 - Click the **calendar icon** to select your **claim start date**.
 - If applicable, choose your **job role** from the drop-down menu.
 - Select the **correct claim form template**.
Example: For an eye test, choose “Mileage and Expenses Claim”.
 - Click **“New”** to continue.

Note: This form **can** be used to claim **mileage but only if you have passengers**. See the next sections of this guide for specific instructions.



3. **Page 1** is for mileage (with a passenger). To submit a **non-mileage expense**, go to **Page 2**.



Job title: Learning and Organisation Development Coordinator
Employee: Training Manager
Payroll: DELT SHARED SERVICES LTD (LWD)

Page 1 | **Page 2**

CES – DELT MILEAGE & EXPENSES CLAIM FORM

and/or Expenses.

es

claim needs to be charged to a different to your normal cost centre. If you need to make claims against a different cost centres, use a claim form per cost centre. If you need to claim against more than one item

5 HOURS ARE PREFIXED WITH A '-' MINUS SYMBOL.

Vehicle	Scheme	Cost Centre (if not home cost centre)
AAA33 AA3	Delt-Delt	

4. Use the **drop-down menu** to choose your expense type.

Examples include:

- Eye Tests
- Rail Fares
- Parking
- Flu Jabs
- Other eligible items

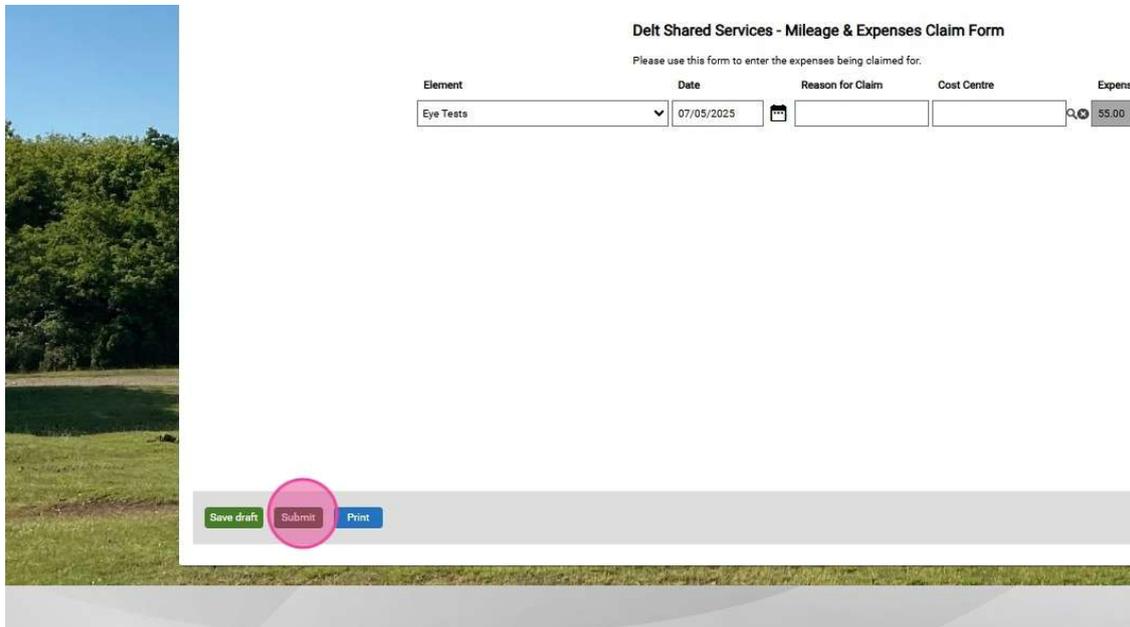
The screenshot shows a web application interface for submitting an expense claim. At the top left, there is a link '< Back to Dashboard'. Below this, the text 'Time & expenses claim entry: (New)' is visible. The user's details are displayed: 'Job title: Learning and Organisation Development Coordinator', 'Employee: Training Manager', and 'Payroll: DELT SHARED SERVICES LTD (LWD)'. The page is identified as 'Page 1 | Page 2'. The main heading is 'Delt Shared Services - Mileage & Expenses Claim Form', followed by the instruction 'Please use this form to enter the expenses being claimed for:'. The form has five columns: 'Element', 'Date', 'Reason for Claim', 'Cost Centre', and 'Expenses Claim Amount'. The 'Element' column contains a dropdown menu with 'Eye Tests' selected, which is highlighted by a pink circle. The 'Date' column has a calendar icon, 'Reason for Claim' has a text input field, 'Cost Centre' has a text input field, and 'Expenses Claim Amount' has a numeric input field with a search icon.

5. Fill in the **claim details**, including the date of the expense, the reason for the claim, and the amount being claimed.

This screenshot shows the same form as above, but with more data entered. The 'Date' field now contains '07/05/2025'. The 'Expenses Claim Amount' field contains the number '54', which is highlighted by a pink circle. The 'Reason for Claim' and 'Cost Centre' fields remain empty. The rest of the interface, including the user details and page information, is identical to the previous screenshot.

6. Once completed, click:

- “**Submit**” – to send the claim for approval
- “**Save as Draft**” – to complete it later



Delt Shared Services - Mileage & Expenses Claim Form

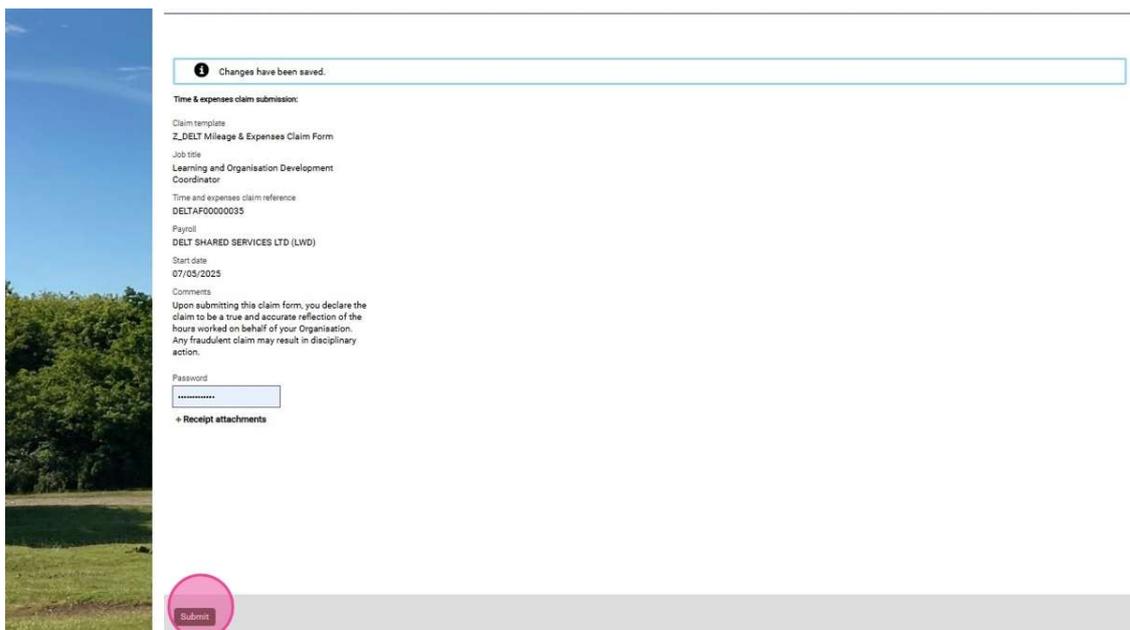
Please use this form to enter the expenses being claimed for:

Element	Date	Reason for Claim	Cost Centre	Expense
Eye Tests	07/05/2025			\$5.00

Buttons: Save draft, Submit, Print

7. You will be taken to a confirmation page.

- Enter your **password** to proceed.
- Upload any **required receipts or documents**.
- Click “**Submit**” to finalise.



Changes have been saved.

Time & expenses claim submission:

Claim template
Z_DELT Mileage & Expenses Claim Form

Job title
Learning and Organisation Development Coordinator

Time and expenses claim reference
DELTAFO0000035

Payroll
DELT SHARED SERVICES LTD (LWD)

Start date
07/05/2025

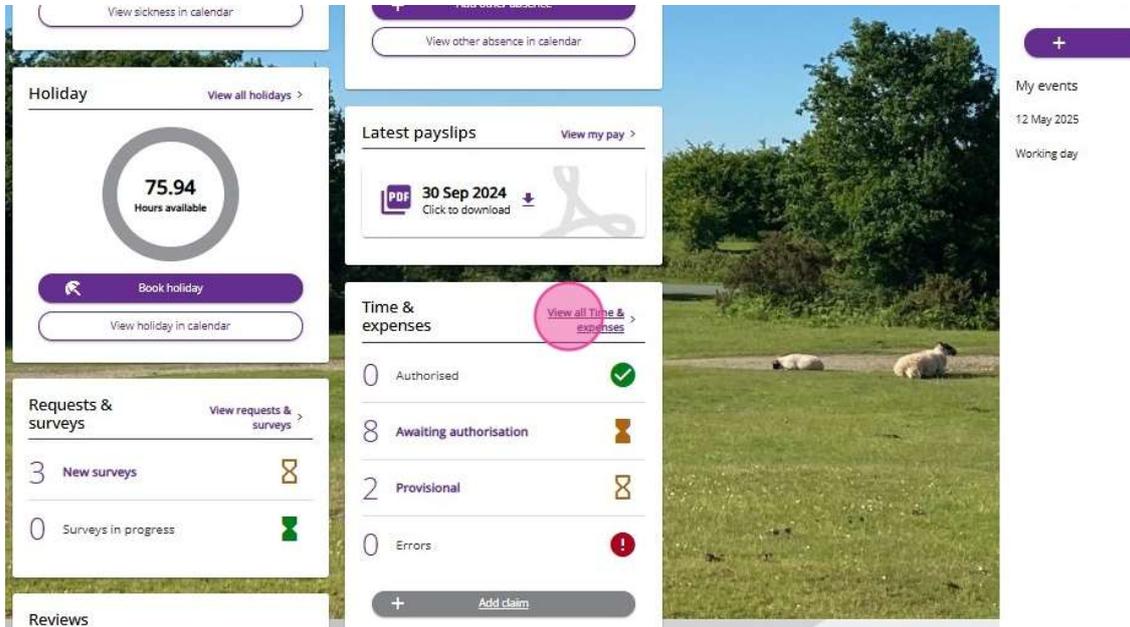
Comments
Upon submitting this claim form, you declare the claim to be a true and accurate reflection of the hours worked on behalf of your Organisation. Any fraudulent claim may result in disciplinary action.

Password
.....

+ Receipt attachments

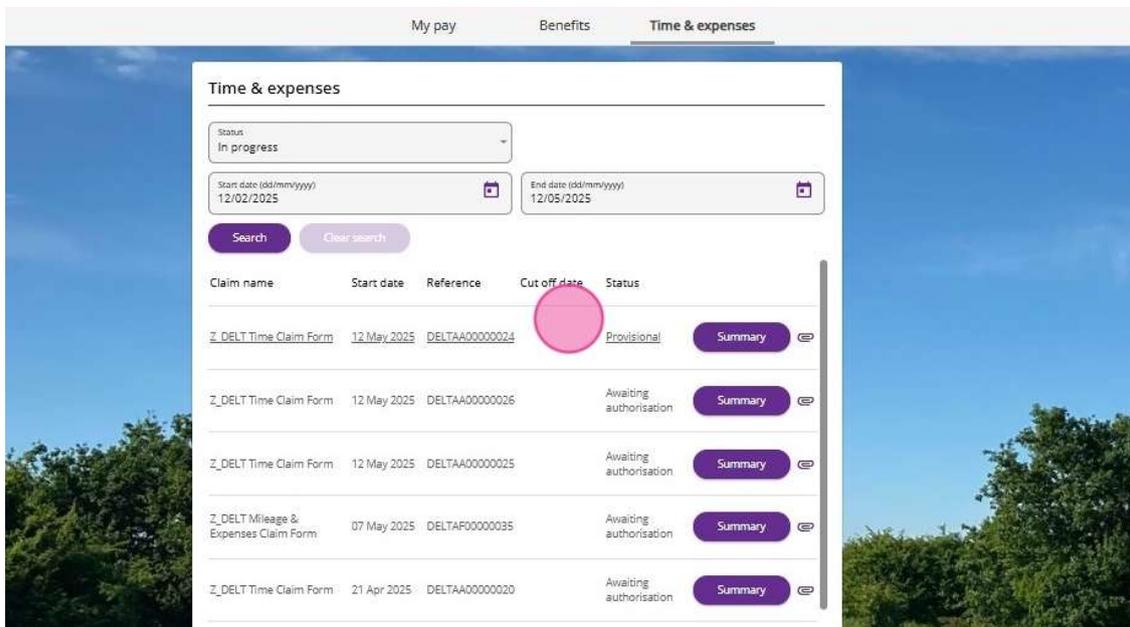
Submit

8. To view your claims, go to the Time and Expenses widget on your Employee Dashboard. Click "View all Time and Expenses".



9. You can filter claims by **Date**, or **Status** (e.g., Submitted, Approved, Rejected)

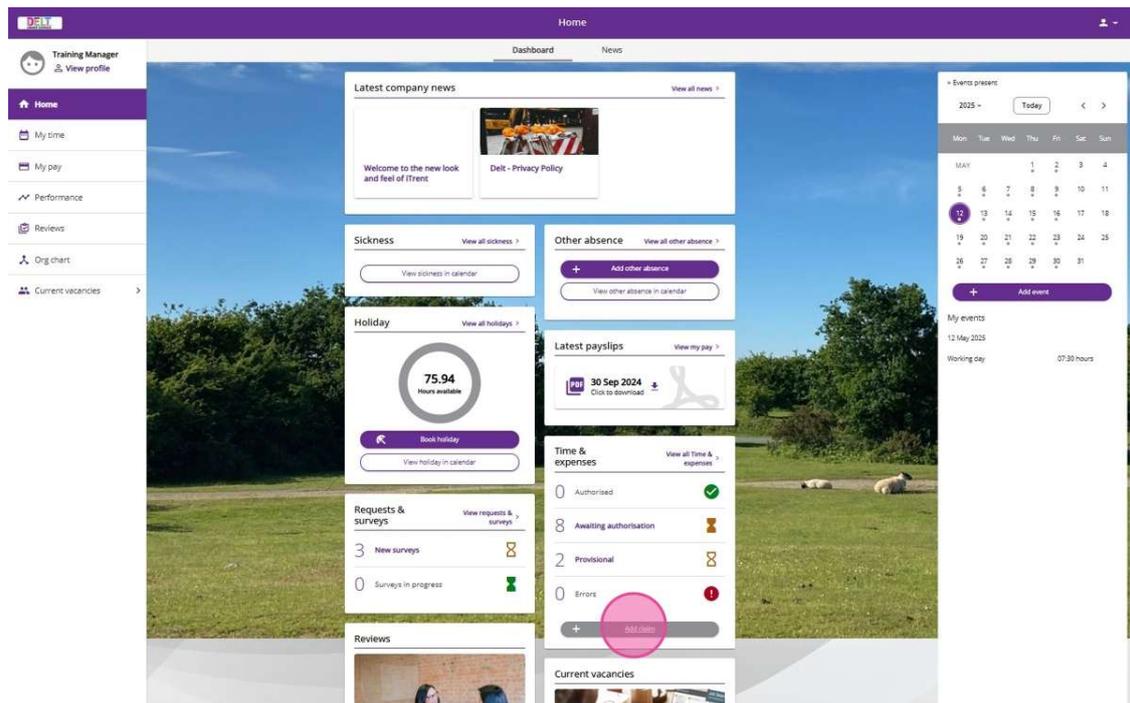
View summaries of each claim for easy reference.



Submitting a Mileage Claim (With Passengers)

Note: Claiming mileage **with passengers** is different from a standard mileage claim **without passengers**. If you are claiming for a **solo journey**, please follow the next section instead.

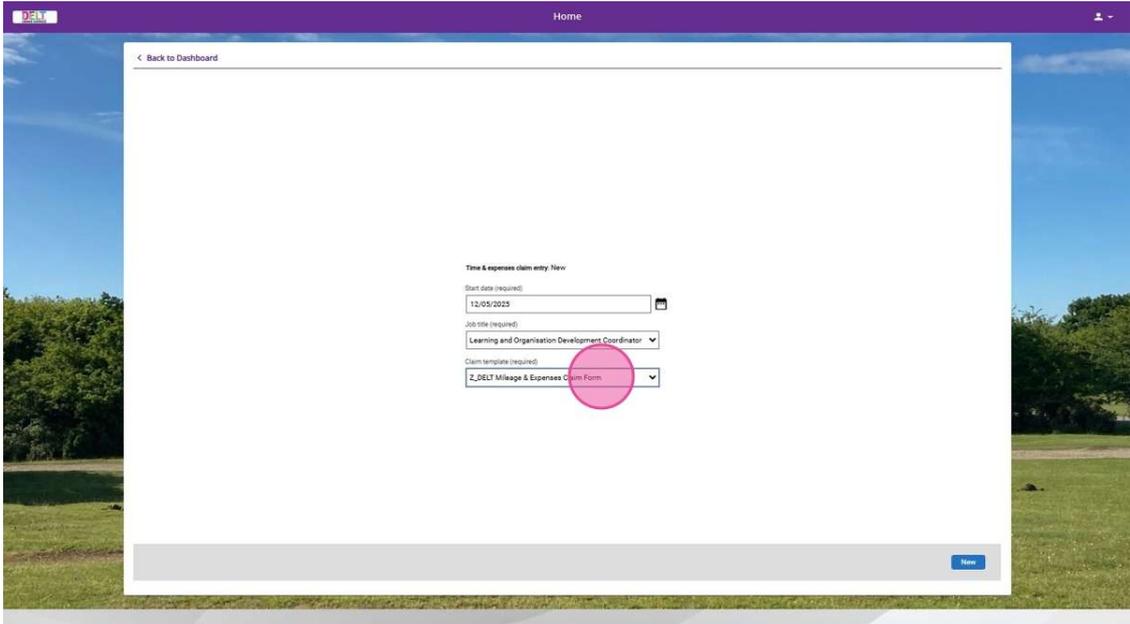
10. From your iTrent **Employee Dashboard**, scroll to the **Time and Expenses** section. Click **“Add Claim”** under the Time and Expenses box.



11. The expense claim form will open.

- Click the **calendar icon** to select your **claim start date**.
- If applicable, choose your **job role** from the drop-down menu.
- Select the **Mileage and Expenses Claim form**
- Click **“New”** to continue.

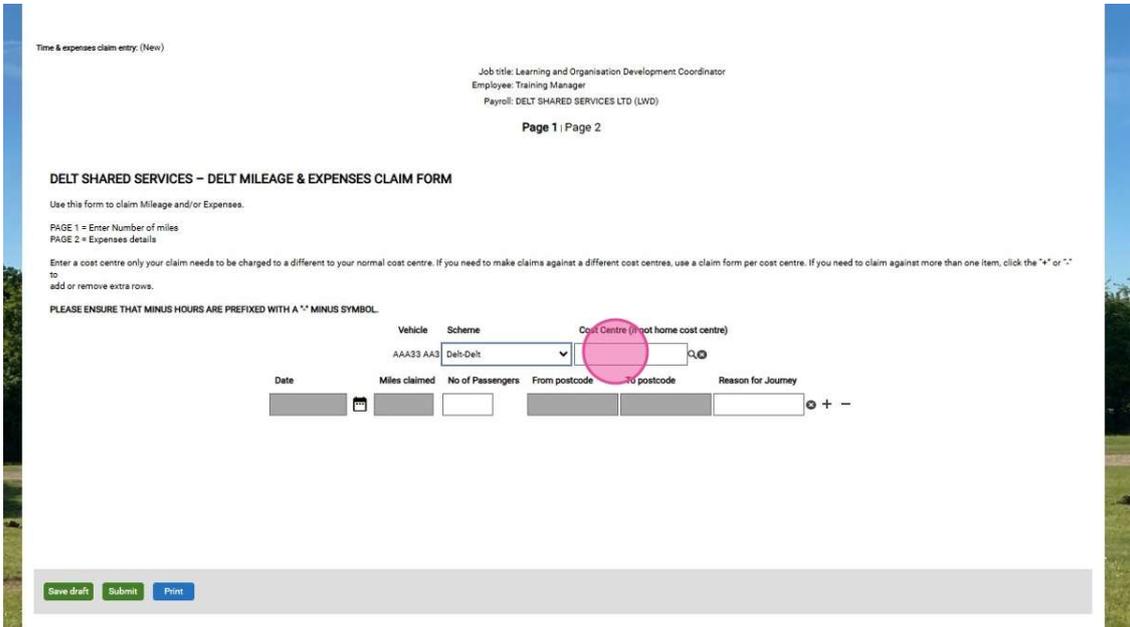
Remember: Please only follow these steps if you are submitting a mileage claim **with passengers**. Follow the next section of this guide to submit a mileage claim if you have travelled by yourself.



12. This will take you to the following claim form. This form is used to claim Mileage and/or Expenses. There are two pages to complete.

If your claim needs to be charged to a different cost centre to your normal one, enter the **cost centre code**.

If you need to submit claims for multiple cost centres, complete a separate claim form for each. (Details outlined below).



13. Fill in the required fields, including:

- The appropriate scheme
- Date
- Miles claimed
- Number of passengers
- Postcodes
- Reason for journey

Time & expenses claim entry: (New)

Job title: Learning and Organisation Development Coordinator
Employee: Training Manager
Payroll: DELT SHARED SERVICES LTD (LND)
Page 1 | Page 2

DELT SHARED SERVICES – DELT MILEAGE & EXPENSES CLAIM FORM

Use this form to claim Mileage and/or Expenses.

PAGE 1 = Enter Number of miles
PAGE 2 = Expenses details

Enter a cost centre only your claim needs to be charged to a different to your normal cost centre. If you need to make claims against a different cost centres, use a claim form per cost centre. If you need to claim against more than one item, click the "+" or "-" to add or remove extra rows.

PLEASE ENSURE THAT MINUS HOURS ARE PREFIXED WITH A "-" MINUS SYMBOL.

Vehicle	Scheme	Cost Centre (if not home cost centre)	Date	Miles claimed	No of Passengers	From postcode	To postcode	Reason for Journey
AAA33 AA3	Delt-Delt							

[Save draft](#) [Submit](#) [Print](#)

14. Use the (+) or (-) buttons to add or remove rows. (Add a new row for each additional cost centre.)

FORM

Enter a cost centre only your claim needs to be charged to a different to your normal cost centre. If you need to make claims against a different cost centres, use a claim form per cost centre. If you need to claim against more than one item, click the "+" or "-" to add or remove extra rows.

Vehicle	Scheme	Cost Centre (if not home cost centre)	Date	Miles claimed	No of Passengers	From postcode	To postcode	Reason for Journey
33 AA3	Delt-Delt							

[Save draft](#) [Submit](#) [Print](#)

15. Once Page 1 is completed, click Page 2 to complete the second page of the form.

Home

Job title: Learning and Organisation Development Coordinator
Employee: Training Manager
Payroll: DELT SHARED SERVICES LTD (LWD)

Page 1 | Page 2

CES - DELT MILEAGE & EXPENSES CLAIM FORM

and/or Expenses.

es

claim needs to be charged to a different to your normal cost centre. If you need to make claims against a different cost centres, use a claim form per cost centre. If you need to claim against more than one item

8 HOURS ARE PREFIXED WITH A "-" MINUS SYMBOL.

Vehicle	Scheme	Cost Centre (if not home cost centre)
AAA33 AA3	Delt-Delt	

16. Enter the required details using the drop-down menu to select the correct **Expense**.

< Back to Dashboard

Time & expenses claim entry: (New)

Job title: Learning and Organisation Development Coordinator
Employee: Training Manager
Payroll: DELT SHARED SERVICES LTD (LWD)

Page 1 | Page 2

Delt Shared Services - Mileage & Expenses Claim Form

Please use this form to enter the expenses being claimed for.

Element	Date	Reason for Claim	Cost Centre	Expenses Claim Amount
Fuel Costs				

17. Complete the remaining fields, including:

- Date
- Reason for Claim
- Cost Centre Code
- Expense Claim Amount (Format: 00.00)

Once all fields are completed, click **Submit**.

Time & expenses claim entry: (New)

Job title: Learning and Organisation Development Coordinator
Employee: Training Manager
Payroll: DELT SHARED SERVICES LTD (LWD)

Page 1 | Page 2

Delt Shared Services - Mileage & Expenses Claim Form

Please use this form to enter the expenses being claimed for.

Element	Date	Reason for Claim	Cost Centre	Expenses Claim Amount
Fuel Costs	12/05/2025	Business travel to client s		20.50

Save draft Submit Print

18. The next page after submitting the form will confirm your changes have been saved (unless there are any errors). This is also where you can upload receipt attachments. If everything is attached, and correct, click **submit** again to finalise the claim.

Payroll
DELT SHARED SERVICES LTD (LWD)

Start date
12/05/2025

Comments
Upon submitting this claim form, you declare the claim to be a true and accurate reflection of the hours worked on behalf of your Organisation. Any fraudulent claim may result in disciplinary action.

Password
.....

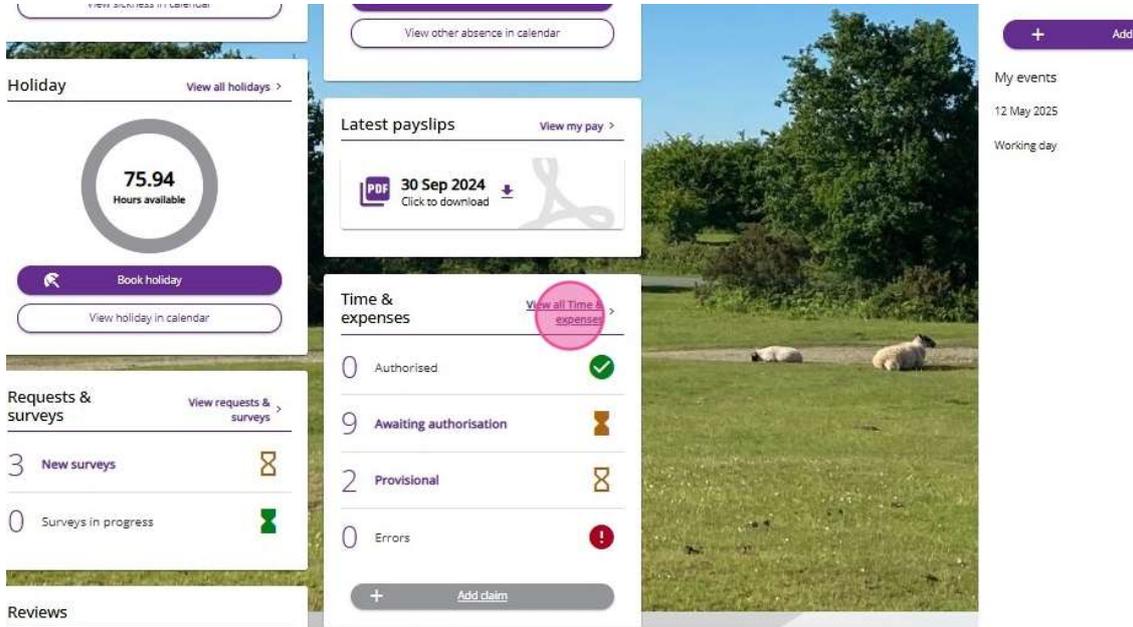
- Receipt attachments

Receipt type
Document PDF

Attach receipt
Choose File No file chosen

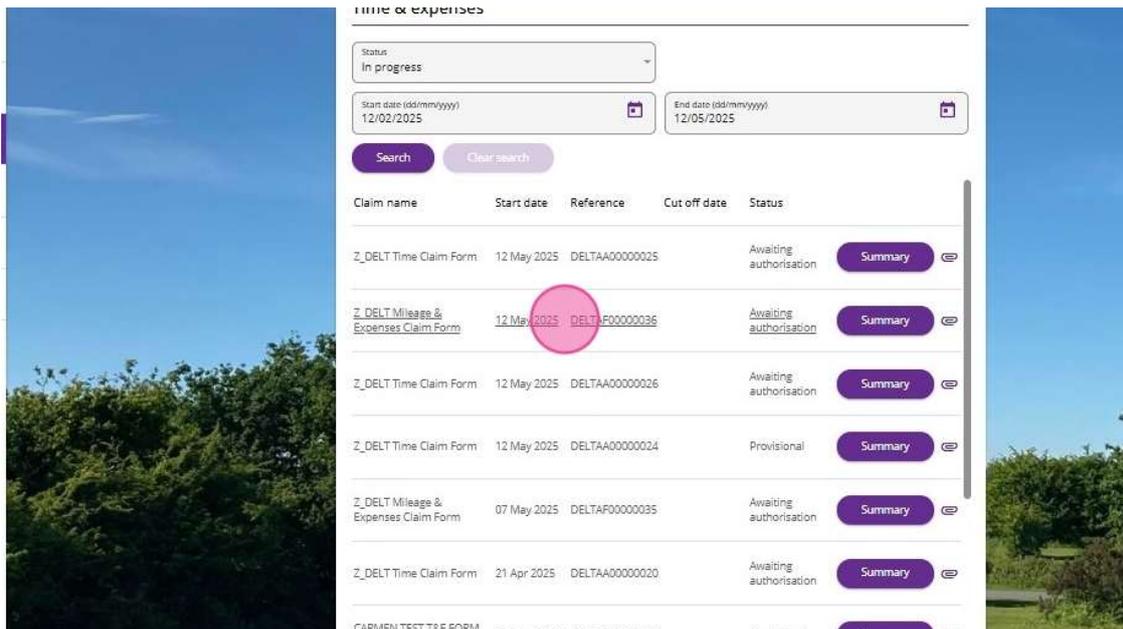
Submit

19. To track and review your claims, navigate to the **Time and Expenses** section. You can access this from your dashboard in the Time and Expenses widget. Click **"View all Time and Expenses"**.



20. Here, you can:

- Track and review the status of your claims.
- Attach supporting documents by clicking the paperclip icon.
- View a summary of your claim.
- Check the status row to see the current stage of processing.



21. If needed, you can print your claim by clicking the **print** button in your claim overview.

PLEASE ENSURE THAT MINUS HOURS ARE PREFIXED WITH A "-" MINUS SYMBOL.

Vehicle	Scheme	Cost Centre (if not home cost c
AAA33 AA3	Delt-Delt	<input type="text"/>

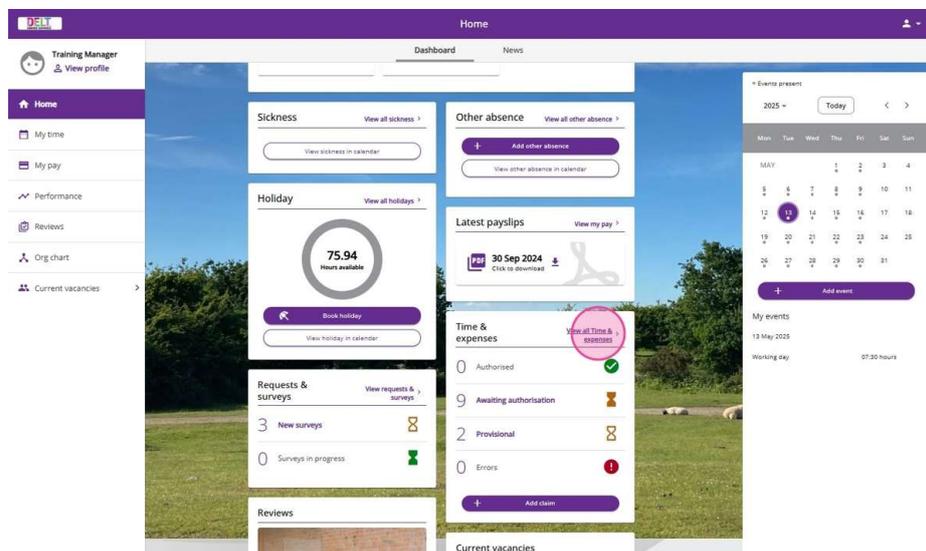
Date	Miles claimed	No of Passengers	From postcode	To postcode
12/05/2025	30	2	PL1 1AA	EX4 3SP

Claiming Mileage (Without Passengers)

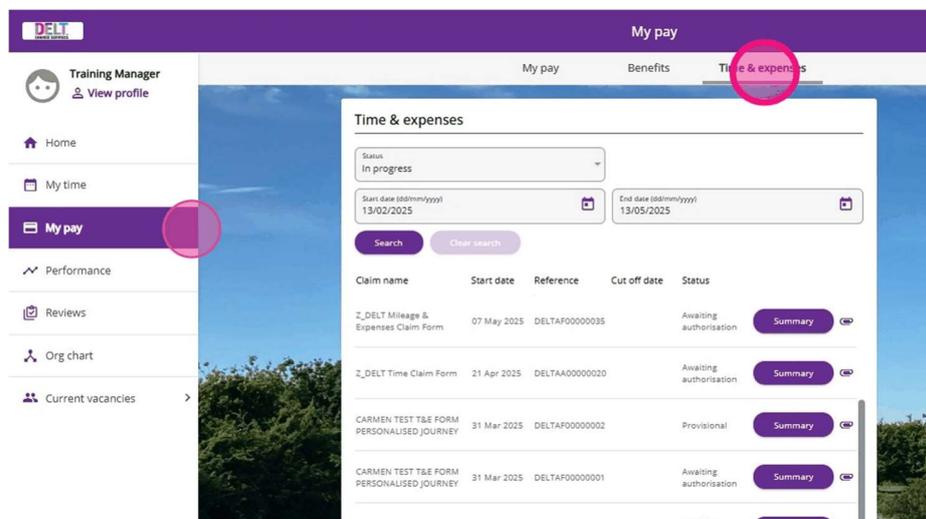
Use this section if you are claiming mileage and **travelled independently (without passengers)**. If you had **passengers**, please refer to the previous section of this guide.

Please note: You cannot submit a mileage claim without a private vehicle. If you need to add a private vehicle, please follow the steps in the *Updating Personal Information* Employee Guide first.

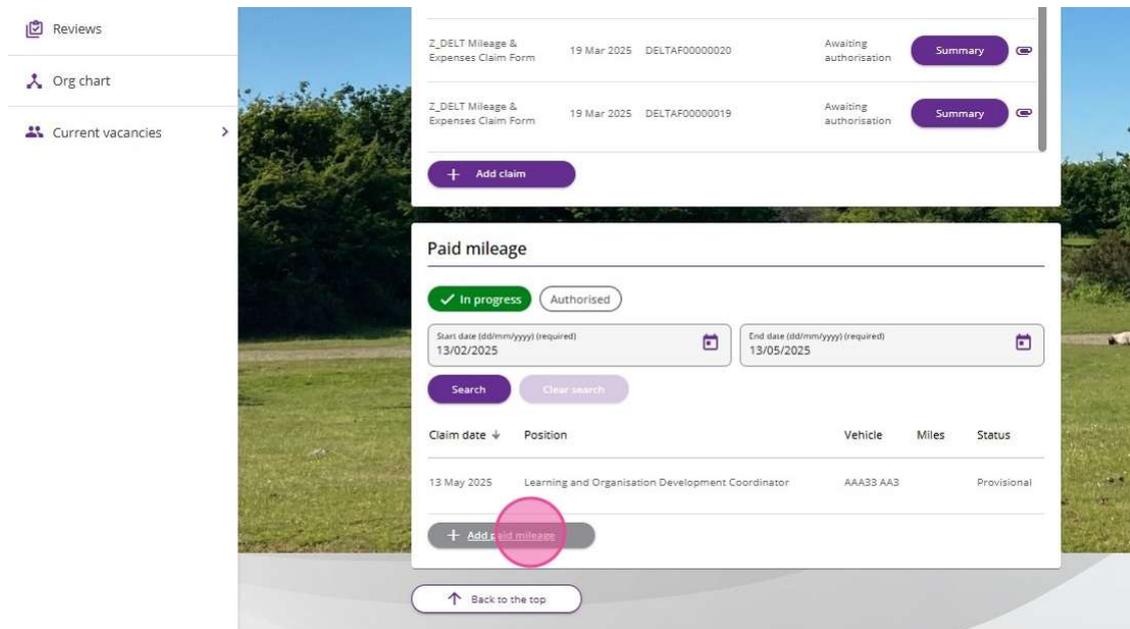
22. From your iTrent **Employee Dashboard**, scroll to the **Time and Expenses** section. Click **“Add Claim”** under the Time and Expenses box.



23. You can also get to **Time and Expenses**, by clicking **My Pay** in the left-hand panel, and making sure you're on the Time and Expenses tab.

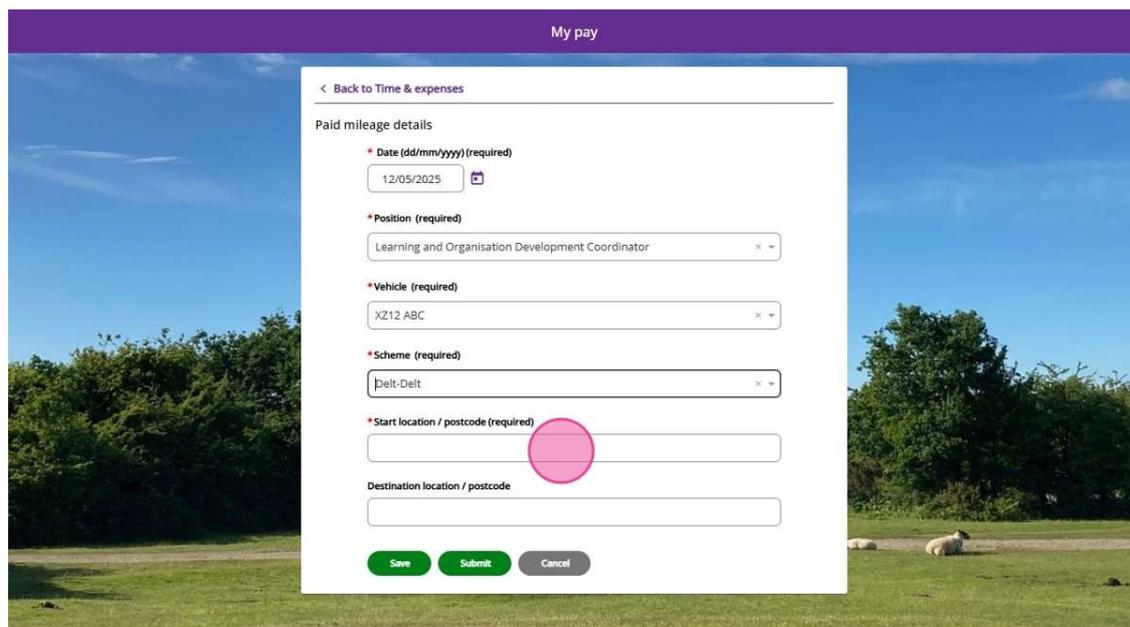


24. Scroll to the paid mileage widget box, and click **"Add paid mileage"**.



25. Complete the required fields:

- **Date** of the journey
- **Job role**
- **Vehicle** – If you haven't added your private vehicle yet, see the *Updating Personal Details* guide.
- **Scheme** – Select from the dropdown menu.
- **Start location** and **Destination location**



26. Once you've filled in all fields, click **"Calculate"**. iTrent will automatically calculate the mileage based on your input.

*Vehicle (required)
XZ12 ABC

*Scheme (required)
Delt-Delt

*Start location / postcode (required)
Delt Shared Services Ltd 2 Derriford Park Derriford Business Park Derrifo

Destination location / postcode
Plymouth City Council Ballard House 26 West Hoe Road PLYMOUTH PL1

Remove

Destination location / postcode

Calculate

Status
Provisional

Save Delete Submit Cancel

27. If you need to override the calculated miles (e.g., due to a diversion), you can enter the actual miles travelled.
Add a reason for the change in the provided field.

Wilcove KEYHAM Milehouse Efford PLYMPTON
Torpoint DEVONPORT Plymouth
Royal William Yard Hoe Park
Saltram Devon Expy
PLYMSTOCK ELBURTON
Google Map data ©2025 Google

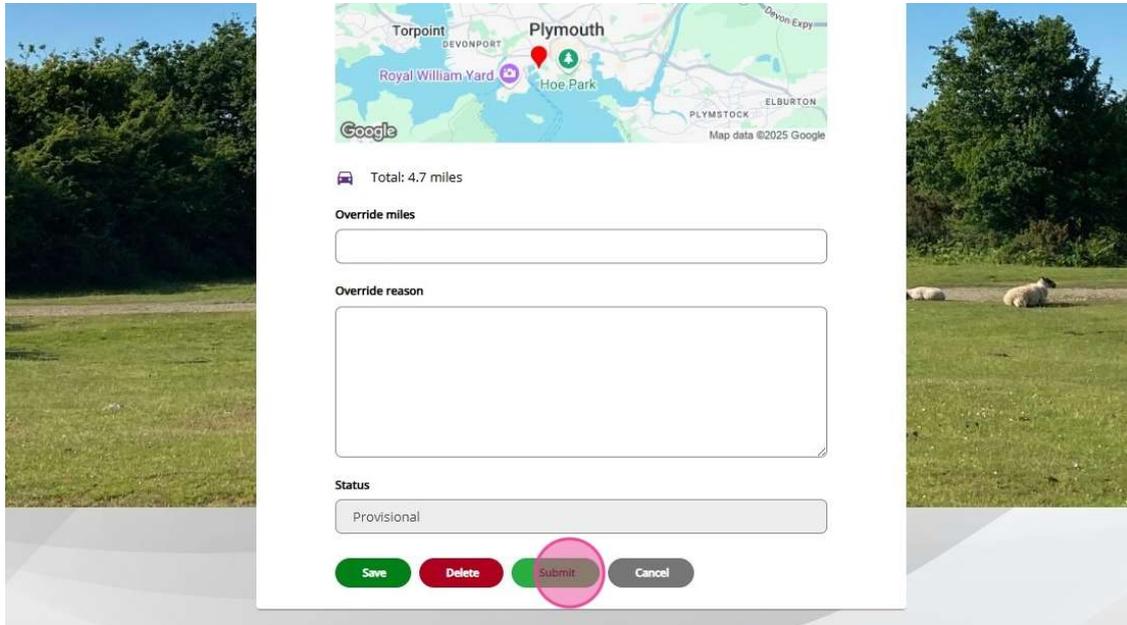
🚗 Total: 4.7 miles

Override miles

Override reason

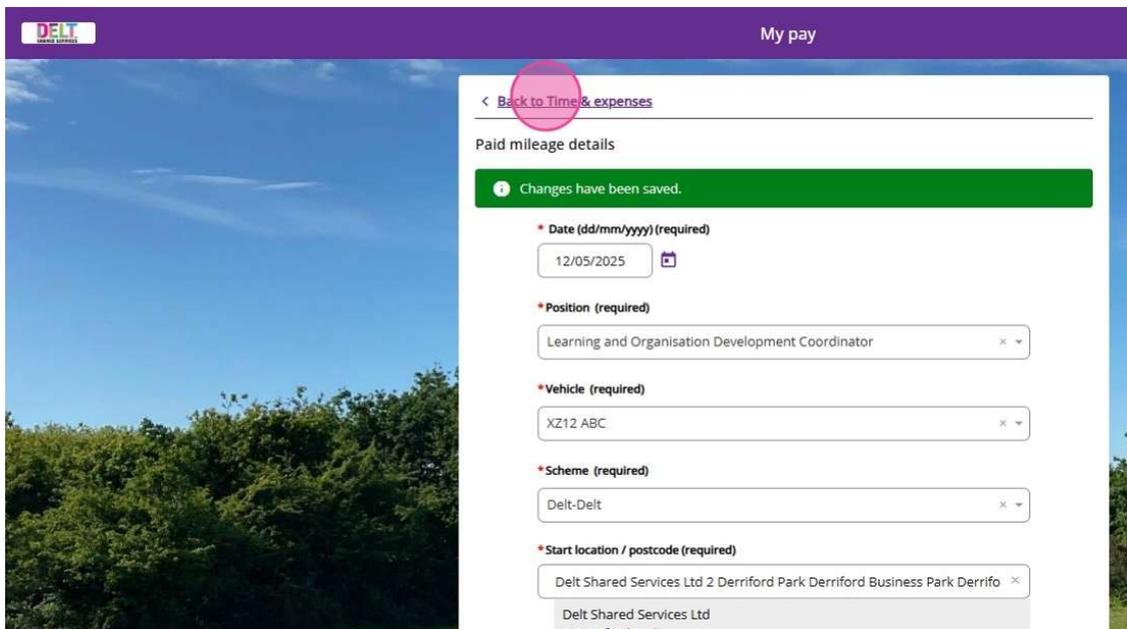
Status
Provisional

28. Click **"Save"** if you want to return and finish later. Click **"Submit"** to finalise your claim.



The screenshot shows a web form for submitting a mileage claim. At the top, there is a Google Map of Plymouth, Devonport, and surrounding areas, with a red pin and a green car icon. Below the map, it says "Total: 4.7 miles". The form has three main sections: "Override miles" with an empty text input field; "Override reason" with a large empty text area; and "Status" with a dropdown menu currently set to "Provisional". At the bottom, there are four buttons: "Save" (green), "Delete" (red), "Submit" (grey, highlighted with a pink circle), and "Cancel" (grey).

29. To view/track your claims, click **"Back to Time and Expenses"**.



The screenshot shows a web page titled "My pay" with a purple header. On the left, there is a large image of a blue sky and green trees. On the right, there is a white panel with a navigation link "< Back to Time & expenses" highlighted with a pink circle. Below the link, the text "Paid mileage details" is followed by a green notification bar that says "Changes have been saved.". The form contains several required fields: "Date (dd/mm/yyyy) (required)" with the value "12/05/2025"; "Position (required)" with the value "Learning and Organisation Development Coordinator"; "Vehicle (required)" with the value "XZ12 ABC"; "Scheme (required)" with the value "Delt-Delt"; and "Start location / postcode (required)" with the value "Delt Shared Services Ltd 2 Derriford Park Derriford Business Park Derrifo".

30. In the **Paid Mileage** section, you can filter claims by **date** or **status**. Click on a claim to **view more details**.

The screenshot displays a user interface for managing expenses. At the top, there is a header for 'Expenses Claim Form' with a breadcrumb trail: 'Expenses > Claim Form > authorisation'. Below this, a summary card shows 'Z_DELT Mileage & Expenses Claim Form' dated '19 Mar 2025' with ID 'DELTAFO0000019'. The status is 'Awaiting authorisation' and there is a 'Summary' button.

The main section is titled 'Paid mileage'. It features two filter buttons: 'In progress' (active) and 'Authorised'. Below the filters are two date input fields: 'Start date (dd/mm/yyyy) (required)' set to '13/02/2025' and 'End date (dd/mm/yyyy) (required)' set to '13/05/2025'. There are 'Search' and 'Clear search' buttons.

A table lists the claims with the following columns: 'Claim date', 'Position', 'Vehicle', 'Miles', and 'Status'. The table contains two rows:

Claim date	Position	Vehicle	Miles	Status
13 May 2025	Learning and Organisation Development Coordinator	AAA33 AA3		Provisional
12 May 2025	Learning and Organisation Development Coordinator	XZ12 ABC	4.7	Awaiting authorisation

A pink circle highlights the 'Awaiting authorisation' status in the second row. Below the table is an 'Add paid mileage' button. At the bottom left, there is a 'Back to the top' button.

On the right side of the image, a calendar view shows dates from 19 to 31. Below the calendar, it says 'My events' and '13 May 2025', followed by the text 'No events to display'.