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.

DELT LTD
SHARED SERVICES iTrent

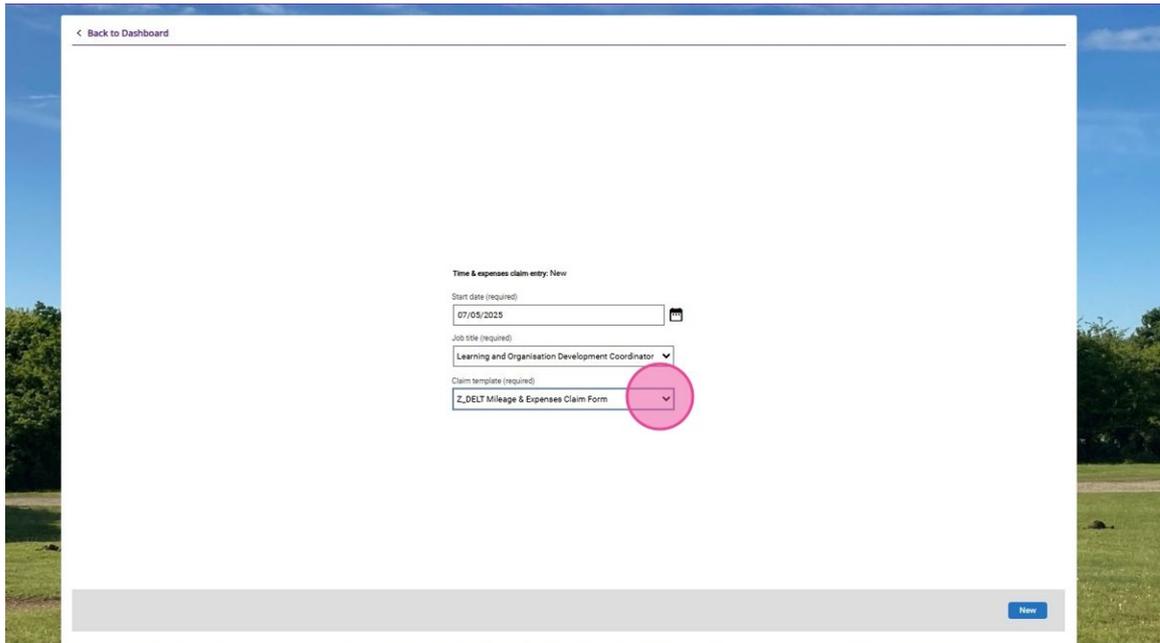# Contents

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.
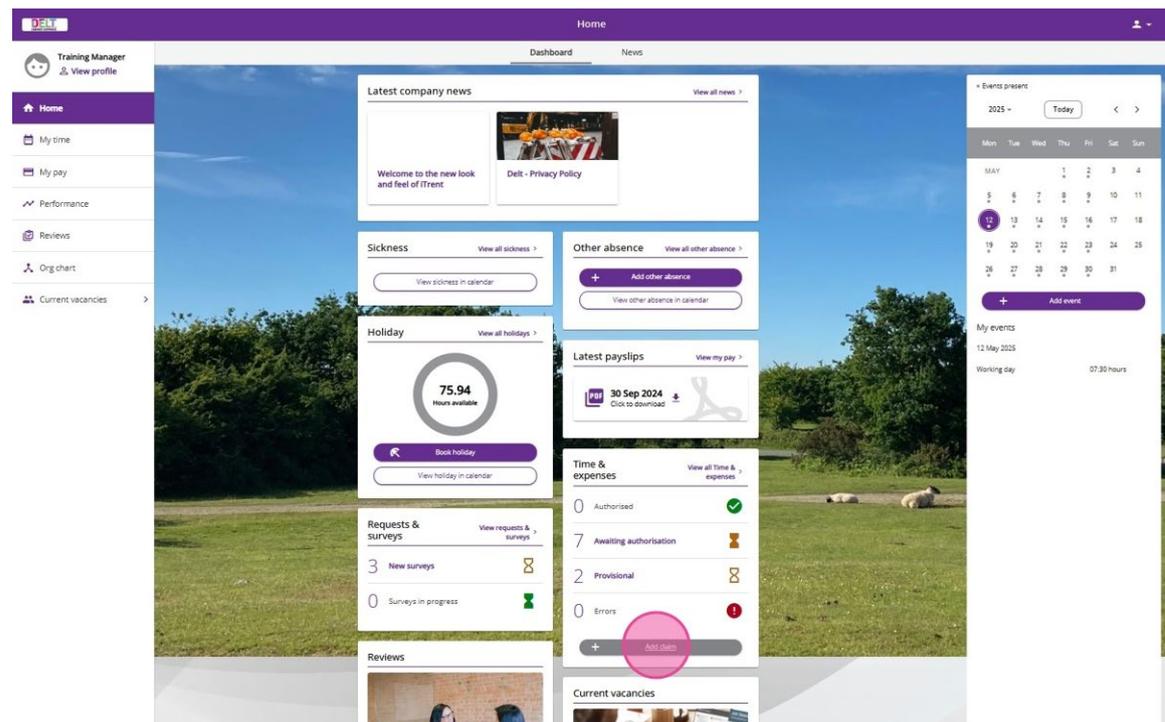

2. The expense claim form will open.

   - 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.

Time & expenses claim entry: New

Start date (required)

07/05/2025

Job title (required)

Learning and Organisation Development Coordinator ⌄

Claim template (required)

Z_DELT Mileage & Expenses Claim Form ⌄

New

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

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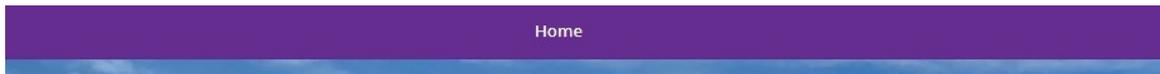
Job title: Learning and Organisation Development Coordinator
Employee: Training Manager
Payroll: DELT SHARED SERVICES LTD (LWD)

Page 1 | Page 2

CES – DELT MILEAGE & EXPENSES CLAIM FORM

e and/or Expenses.

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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 iten

S 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

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

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	Expens
Eye Tests	07/05/2025			55.00

Save draft Submit Print

7. To view your claims and **upload your receipt or any other attachments**, go to the Time and Expenses widget on your Employee Dashboard. Click "View all Time and Expenses".

8. You can filter claims by **Date**, or **Status** (e.g., Submitted, Approved, Rejected). View summaries of each claim for easy reference.

   Click the **paperclip icon** to add your receipt or any other attachment that might be needed.

Time & expenses

Status
In progress

Start date (dd/mm/yyyy)
12/02/2025

End date (dd/mm/yyyy)
12/05/2025

Search Clear search

Claim name	Start date	Reference	Cut off date	Status		
Z_DELT Time Claim Form	12 May 2025	DELTAA00000024		Provisional	Summary	📎
Z_DELT Time Claim Form	12 May 2025	DELTAA00000026		Awaiting authorisation	Summary	📎
Z_DELT Time Claim Form	12 May 2025	DELTAA00000025		Awaiting authorisation	Summary	📎
Z_DELT Mileage & Expenses Claim Form	07 May 2025	DELTAF00000035		Awaiting authorisation	Summary	📎
Z_DELT Time Claim Form	21 Apr 2025	DELTAA00000020		Awaiting authorisation	Summary	📎

Temporary Guide: Submitting a Mileage Claim

Claiming mileage when you have passengers is usually different from a standard mileage claim without passengers.

However, while we await a system upgrade, all mileage claims, whether you travelled alone or with passengers, must be submitted in the same way by following the below steps.

You must also calculate your mileage yourself and enter it directly into the claim form.

Please follow this process for all mileage claims until further notice.

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.

9. From your **iTrent Employee Dashboard**, scroll to the **Time and Expenses** section. Click **"Add Claim"** under the Time and Expenses box.
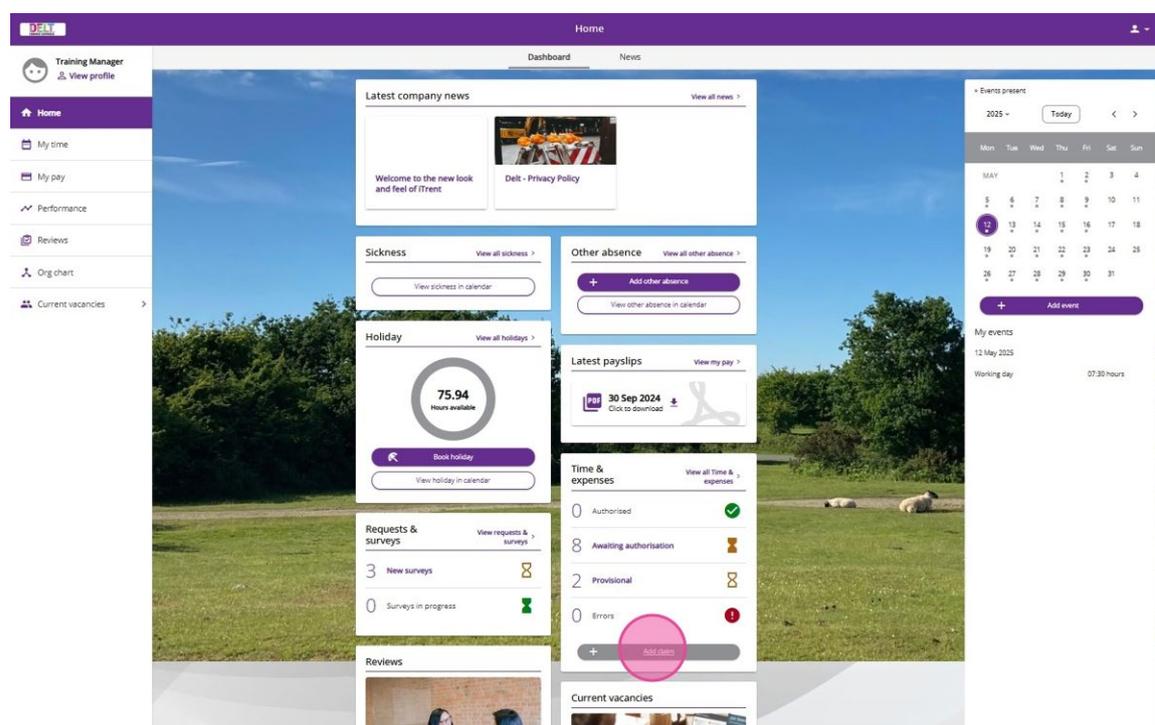
10. The expense claim form will open.

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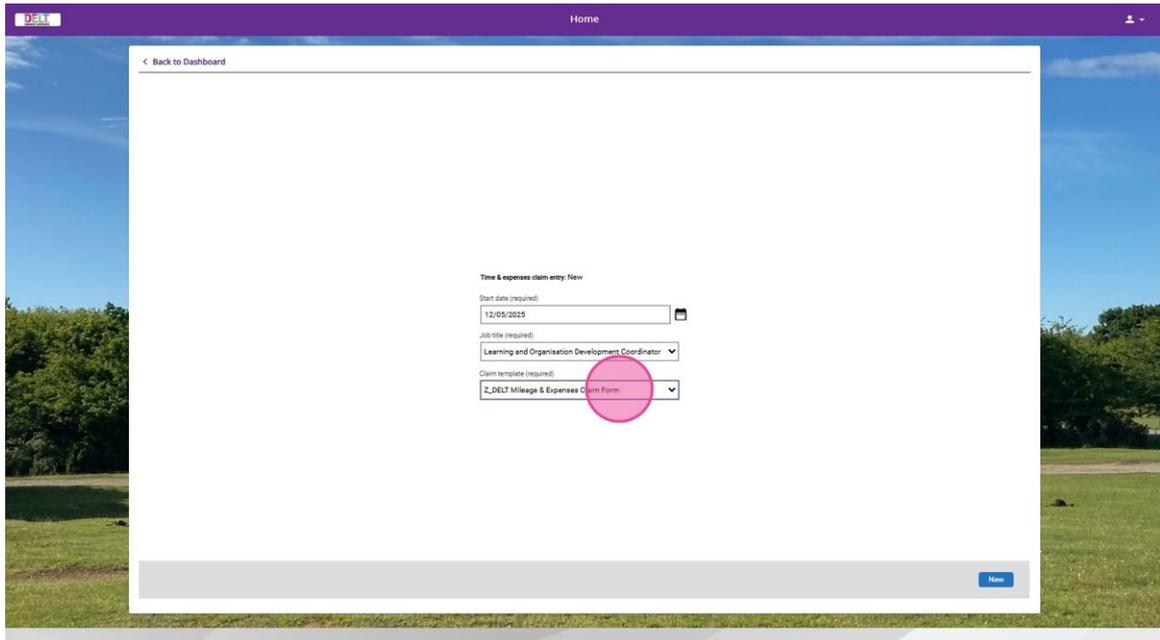
11. This will take you to the following claim form. This form is used to claim Mileage and/or Expenses. There are two pages to complete.

   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).
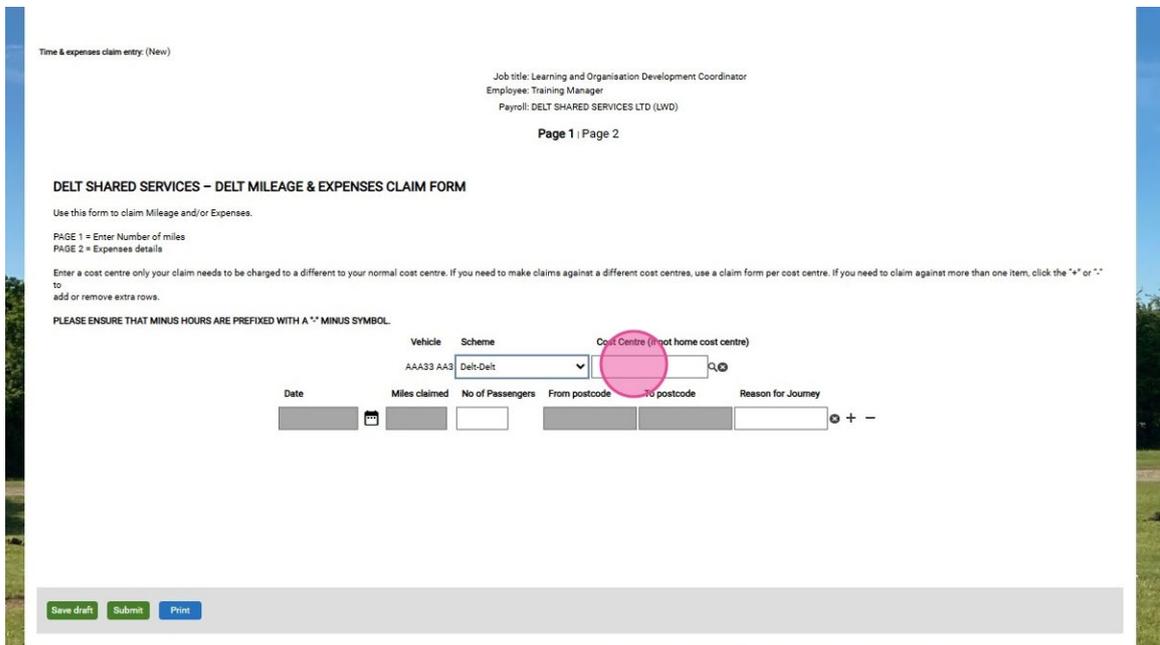
12. Fill in the required fields, including:

   • The appropriate scheme

- Date
- Miles claimed (these will need to be calculated manually)
- Number of passengers (include the number of passengers you had with you)
- Postcodes
- Reason for journey

Remember: You need to calculate your mileage and input this information into the form yourself.

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

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

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

16. 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.**

17. 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.

18. 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"**.
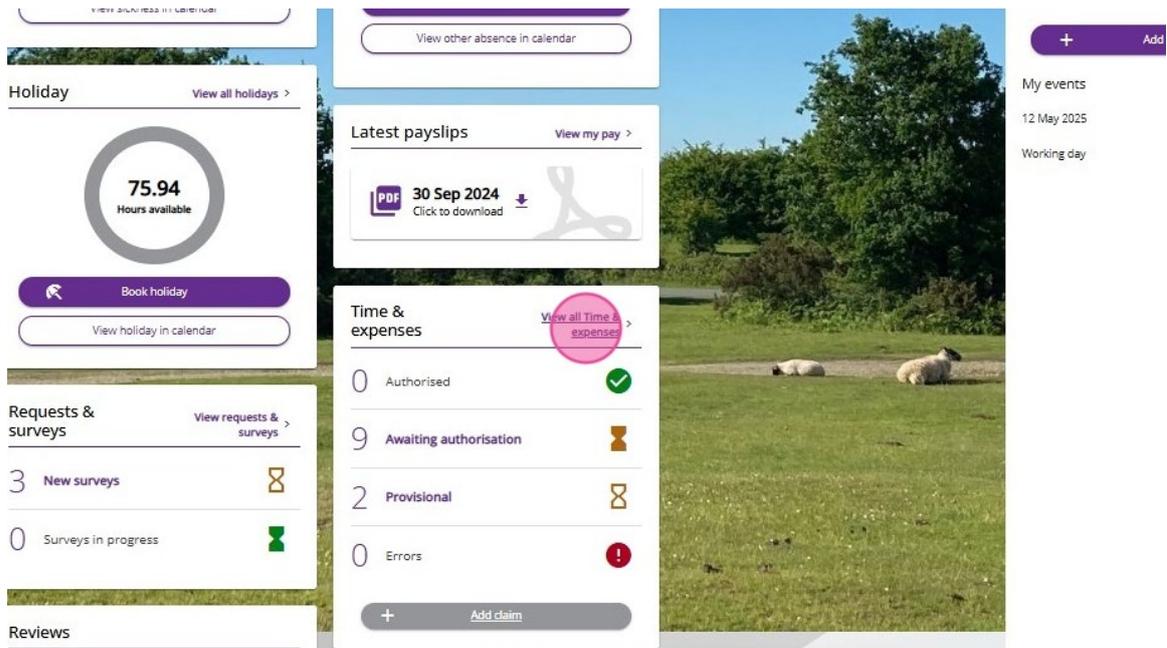
19. Here, you can:

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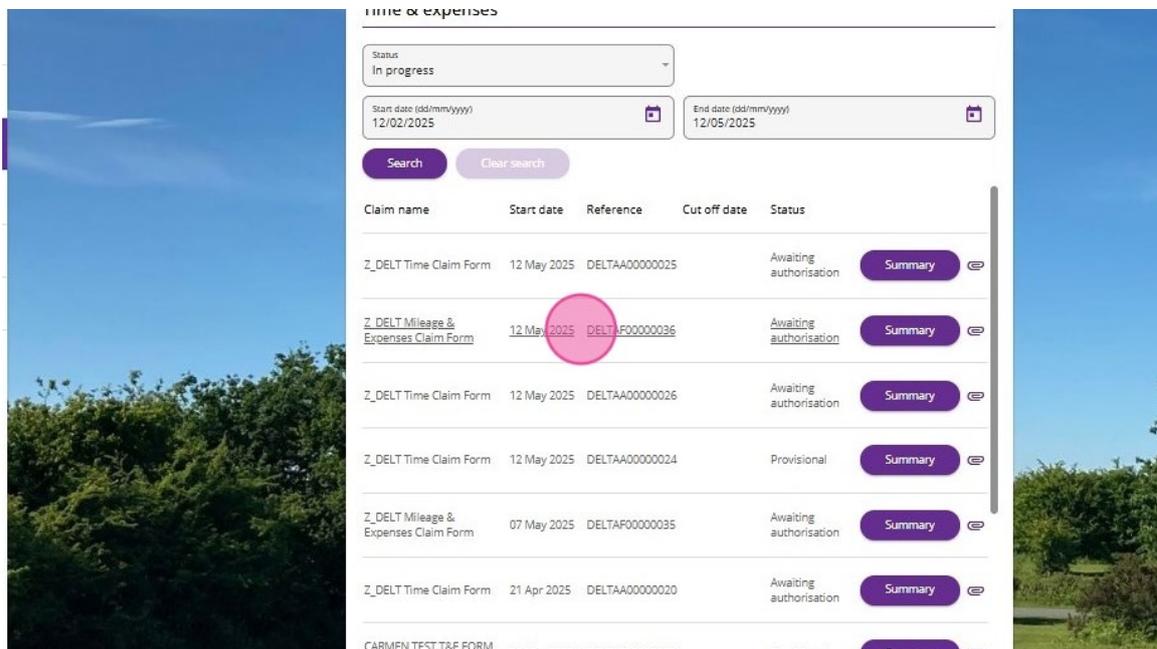
20. If needed, you can print your claim by clicking the **print** button in your claim overview.

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

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

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

Cancel   Print

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

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

Date	Miles claimed	No of Passengers	From postcode	To postcode