

# 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.

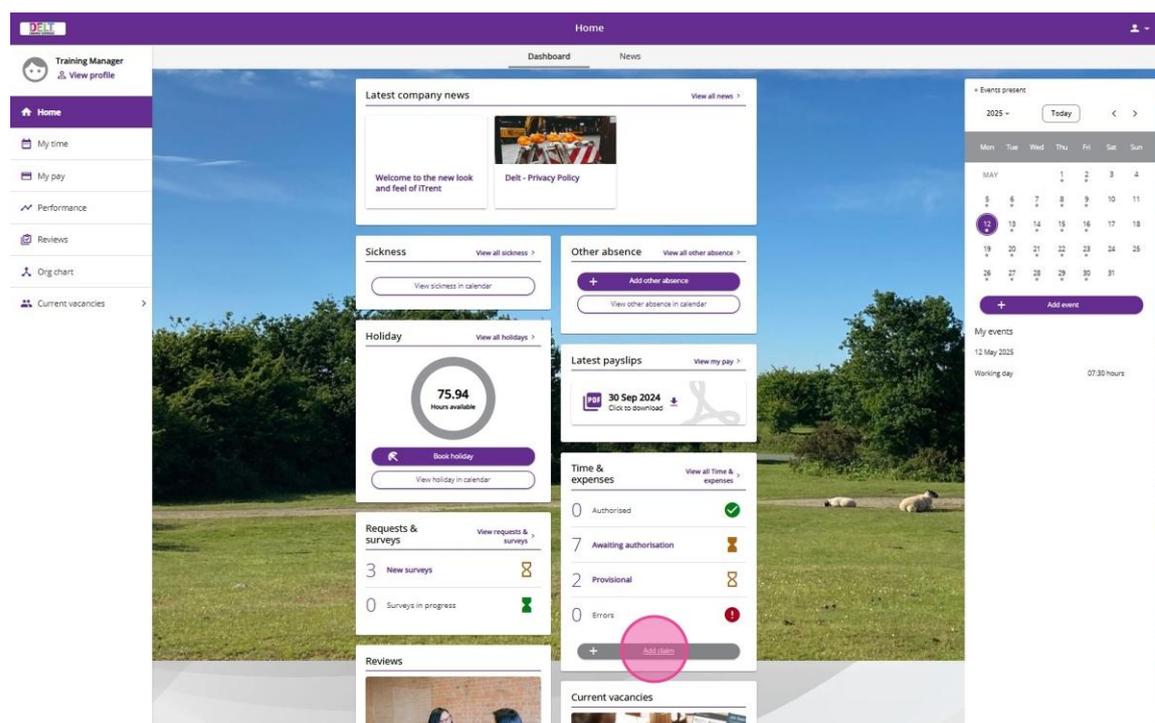
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## Adding a Claim (Eg. Eye Test)

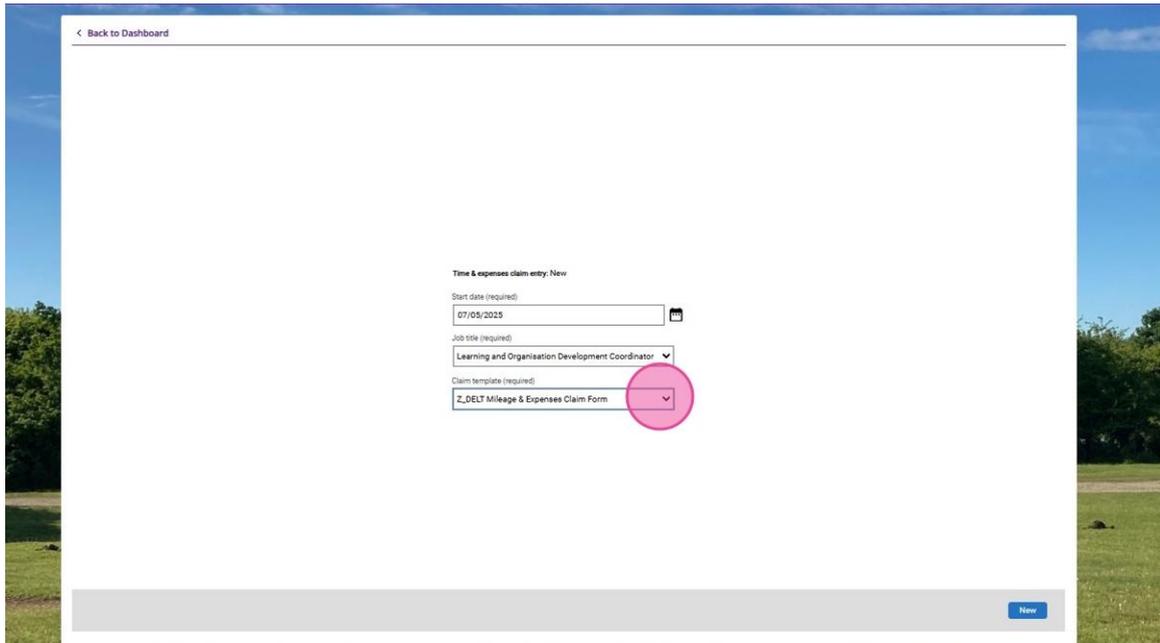
1. Follow these simple steps to submit an expense claim in iTrent. This section of the guide covers general expenses like eye tests, parking, and rail fares. **Mileage claims without passengers follow a different process.**

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

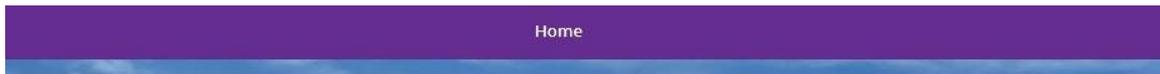


2. The expense claim form will open.
  - Click the **calendar icon** to select your **claim start date**.
  - If applicable, choose your **job role** from the drop-down menu.
  - Select the **correct claim form template**.  
*Example: For an eye test, choose “Mileage and Expenses Claim”.*
  - Click **“New”**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

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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 item

3 HOURS ARE PREFIXED WITH A "\*" MINUS SYMBOL.

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

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

Examples include:

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

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
Eye Tests	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Home

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
Eye Tests	07/05/2023	<input type="text"/>	<input type="text"/>	<input type="text"/>

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			55.00

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  
DELTAF00000035

Payroll  
DELT SHARED SERVICES LTD (LWD)

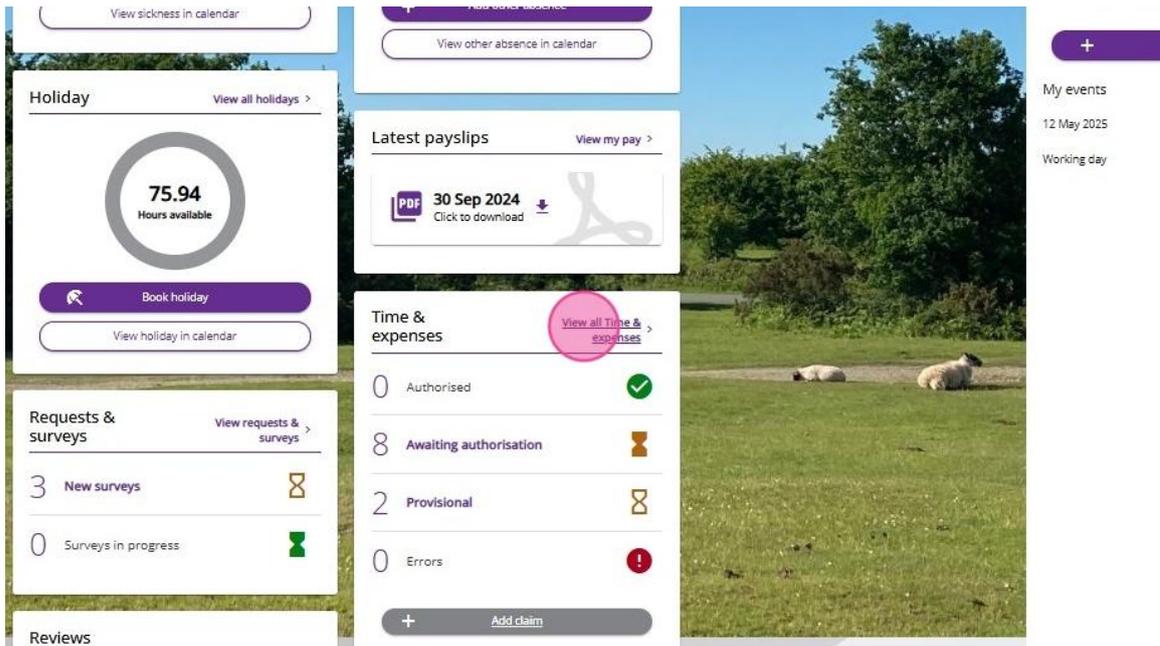
Start date  
07/05/2025

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  
.....

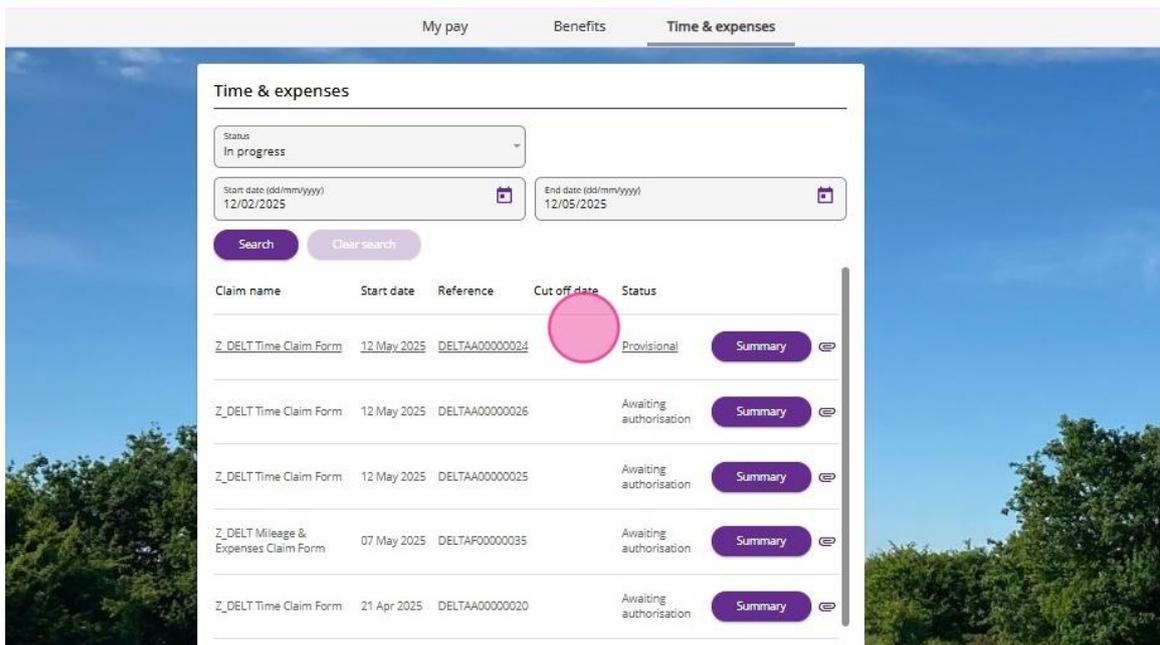
+ Receipt attachments

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)

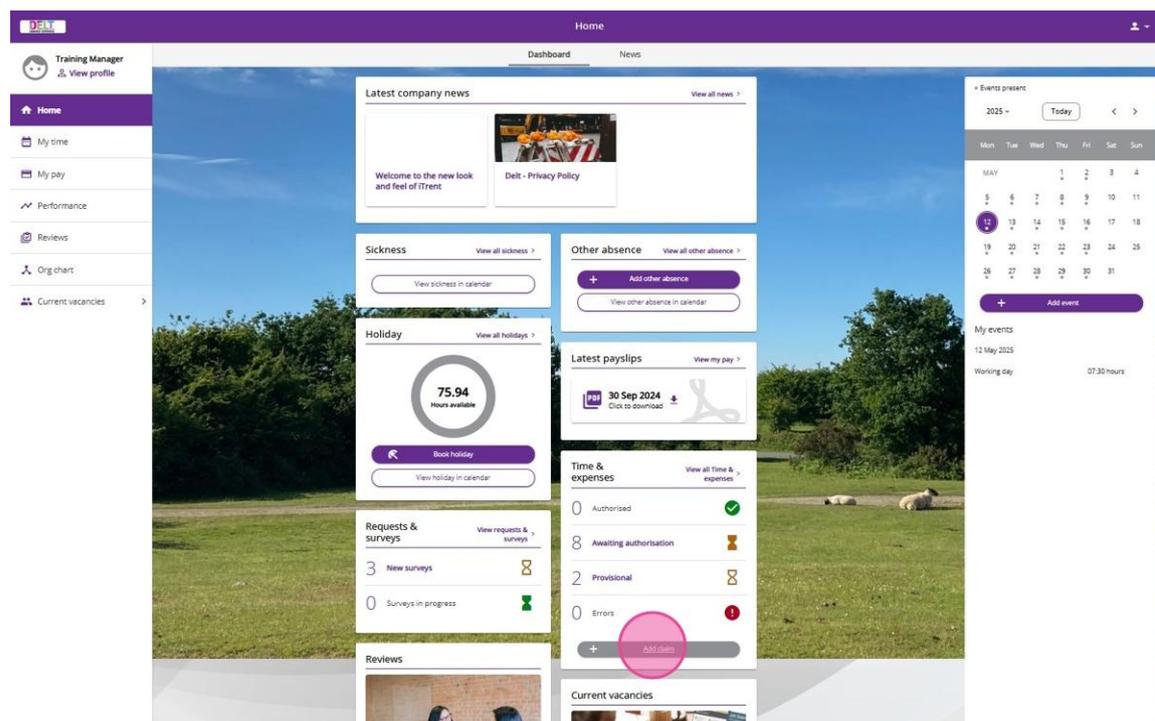
View summaries of each claim for easy reference.



## 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.

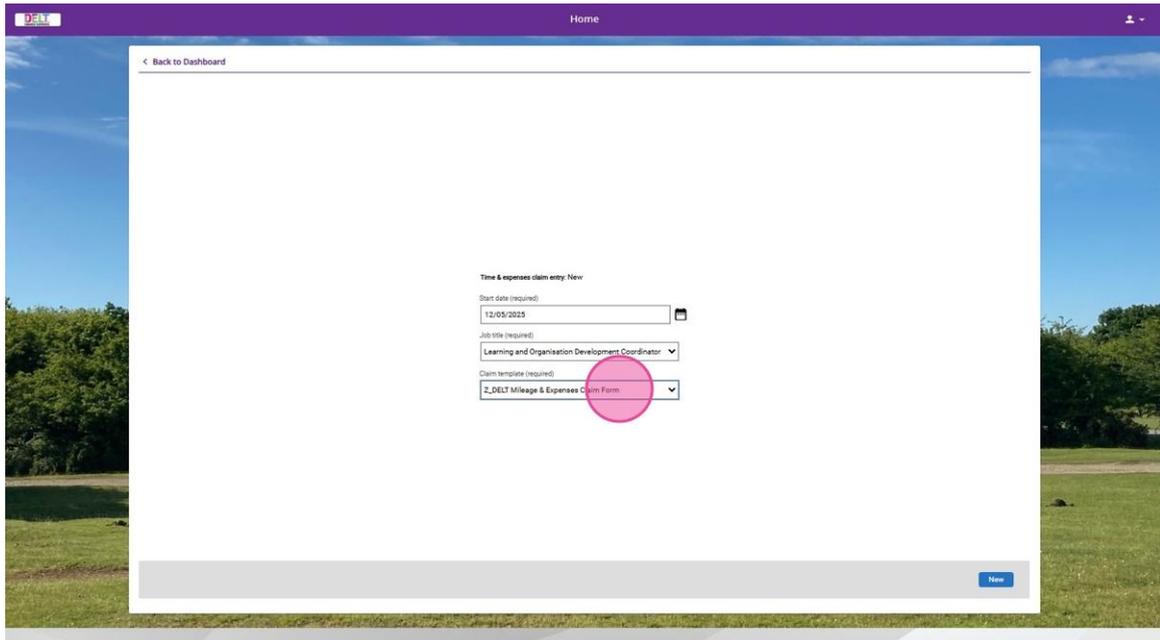
10. From your iTrent Employee Dashboard, scroll to the **Time and Expenses** section. Click **“Add Claim”** under the Time and Expenses box.



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.

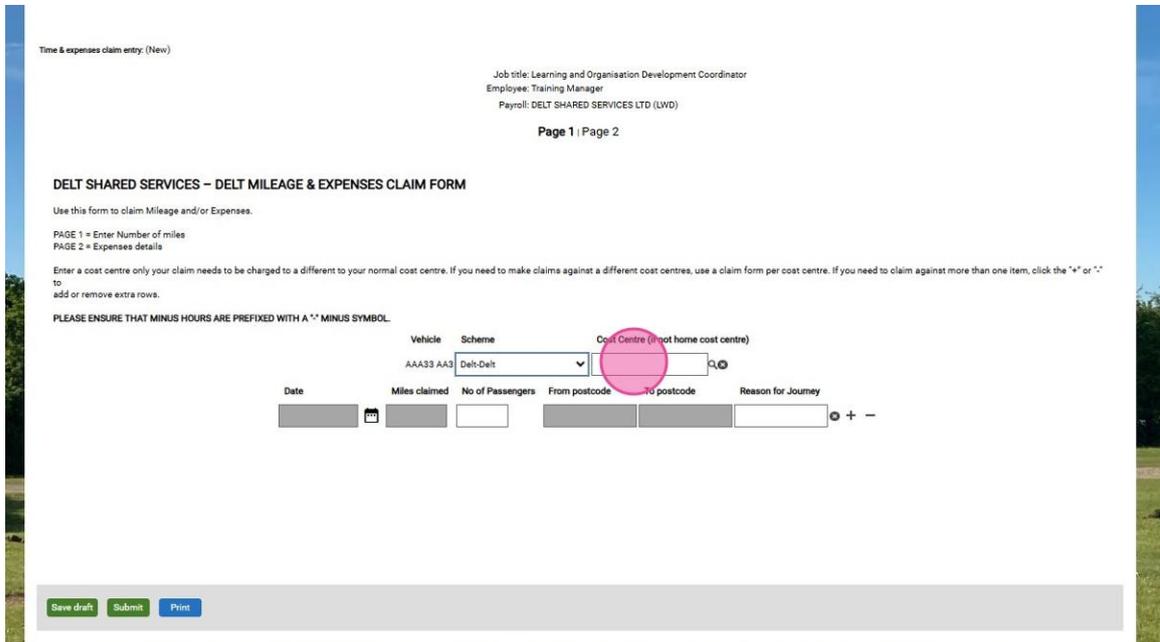
**Remember:** Please only follow these steps if you are submitting a mileage claim **with passengers**. Follow the next section of this guide to submit a mileage claim if you have travelled by yourself.



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 (LWD)

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.

Date	Miles claimed	No of Passengers	From postcode	To postcode	Reason for Journey	
						+ -

Save draft Submit Print

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

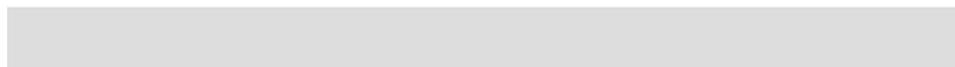
**FORM**

entre. 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 "-"

Vehicle	Scheme	Cost Centre (if not home cost centre)
AA33 AA3	Delt-Delt	

Miles claimed	No of Passengers	From postcode	To postcode	Reason for Journey	
					+ -



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

Home

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

Page 1 | Page 2

**EXPENSES – DELT MILEAGE & EXPENSES CLAIM FORM**

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 item

SH HOURS ARE PREFIXED WITH A "\*" MINUS SYMBOL.

Vehicle	Scheme	Cost Centre (if not home cost centre)
AAA33 AA3	Delt-Delt <span style="font-size: 0.8em;">▼</span>	<input type="text" value=""/> <span style="font-size: 0.8em;">🔍</span>

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	▼ <input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/> <span style="font-size: 0.8em;">🔍</span>	<input type="text" value=""/>

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 a		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  
.....

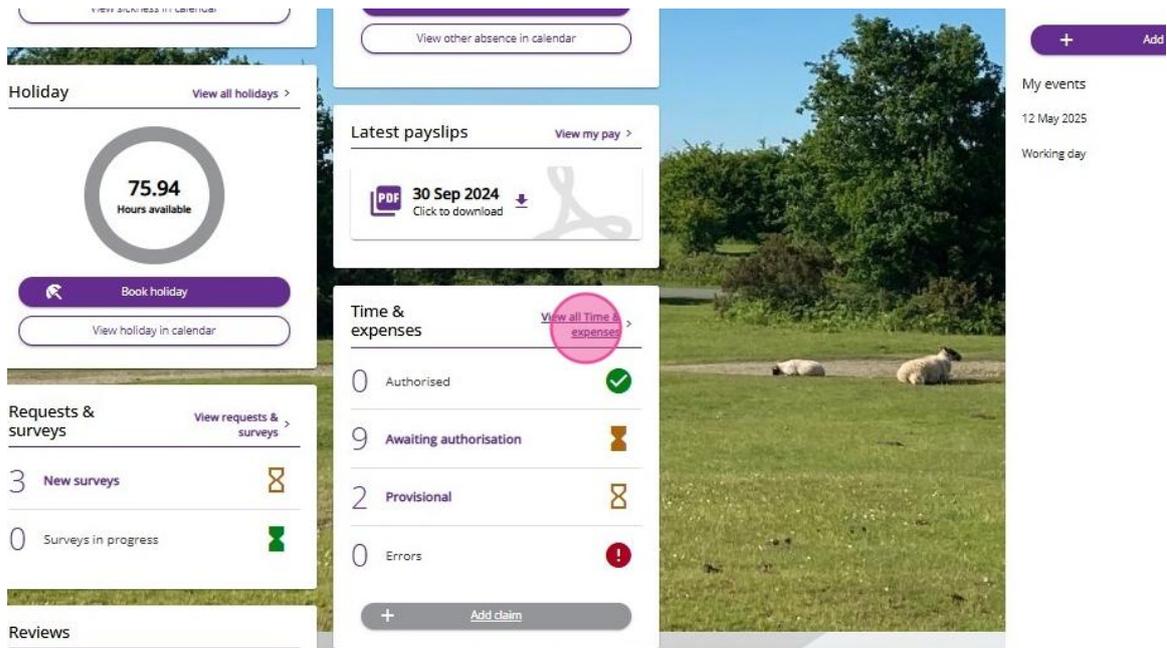
– Receipt attachments

Receipt type  
Document PDF

Attach receipt  
Choose File No file chosen

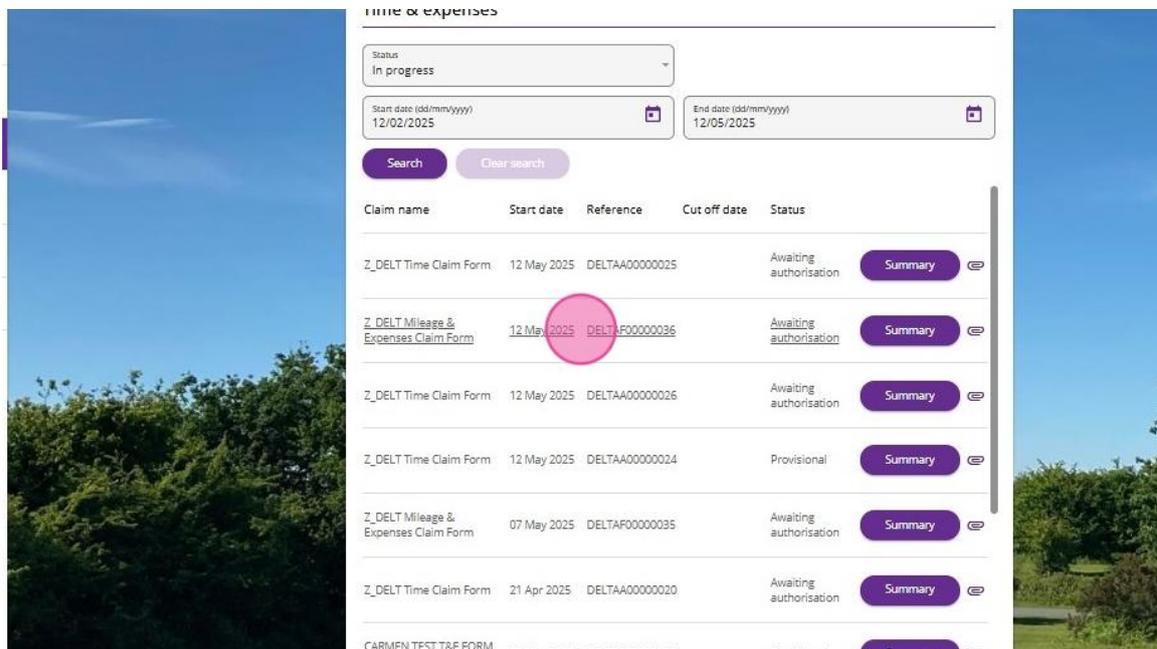
Submit

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.

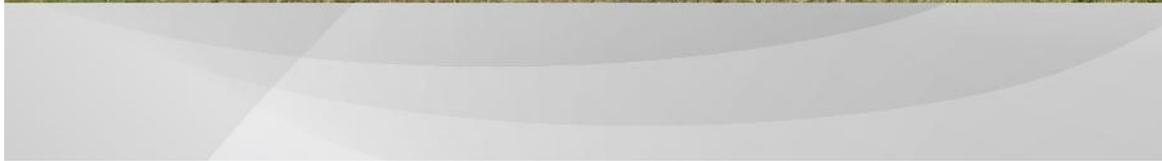


21. If needed, you can print your claim by clicking the **print** button in your claim overview.



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

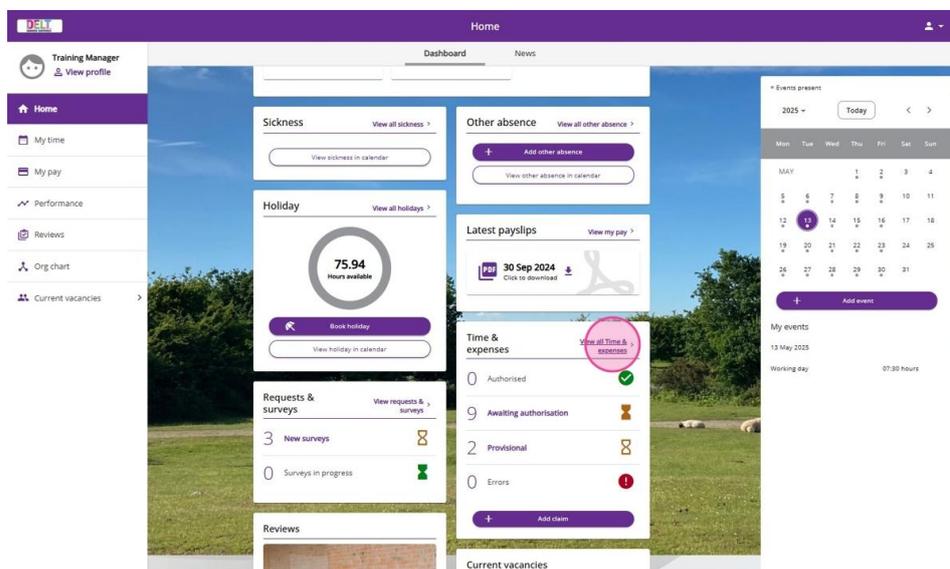


## Claiming Mileage (Without Passengers)

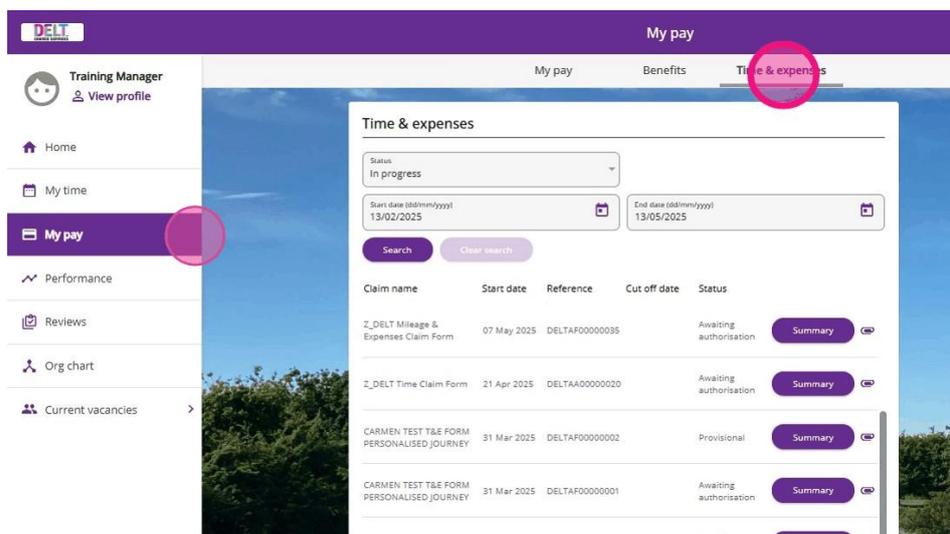
Use this section if you are claiming mileage and **travelled independently (without passengers)**. If you had **passengers**, please refer to the previous section of this guide.

**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.

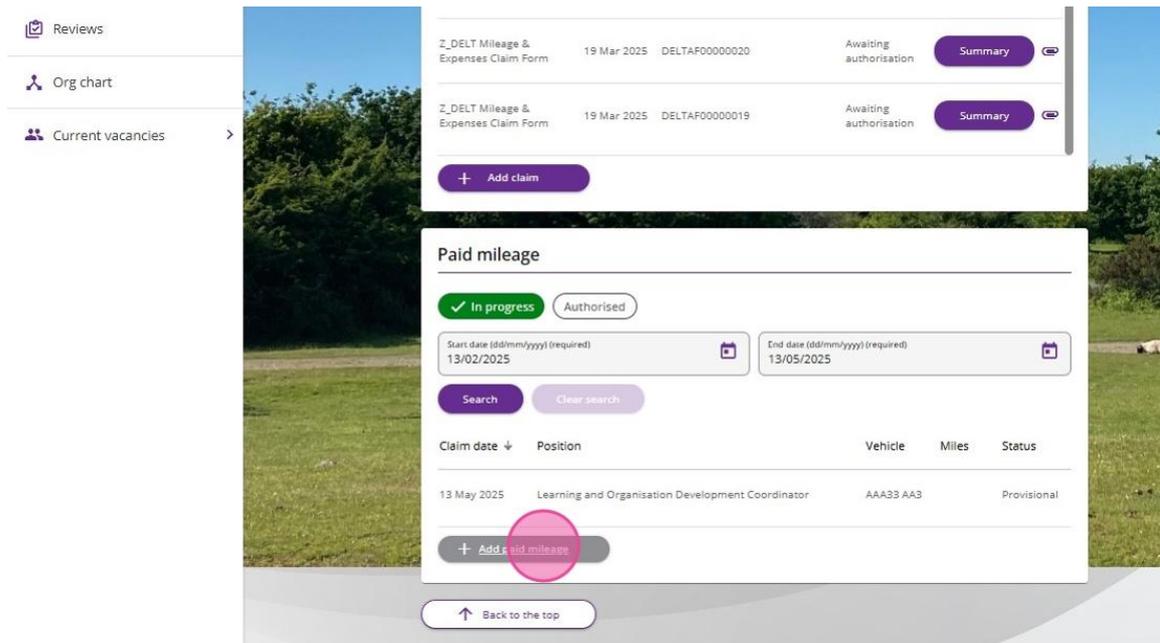
22. From your **iTrent Employee Dashboard**, scroll to the **Time and Expenses** section. Click **"Add Claim"** under the Time and Expenses box.



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.

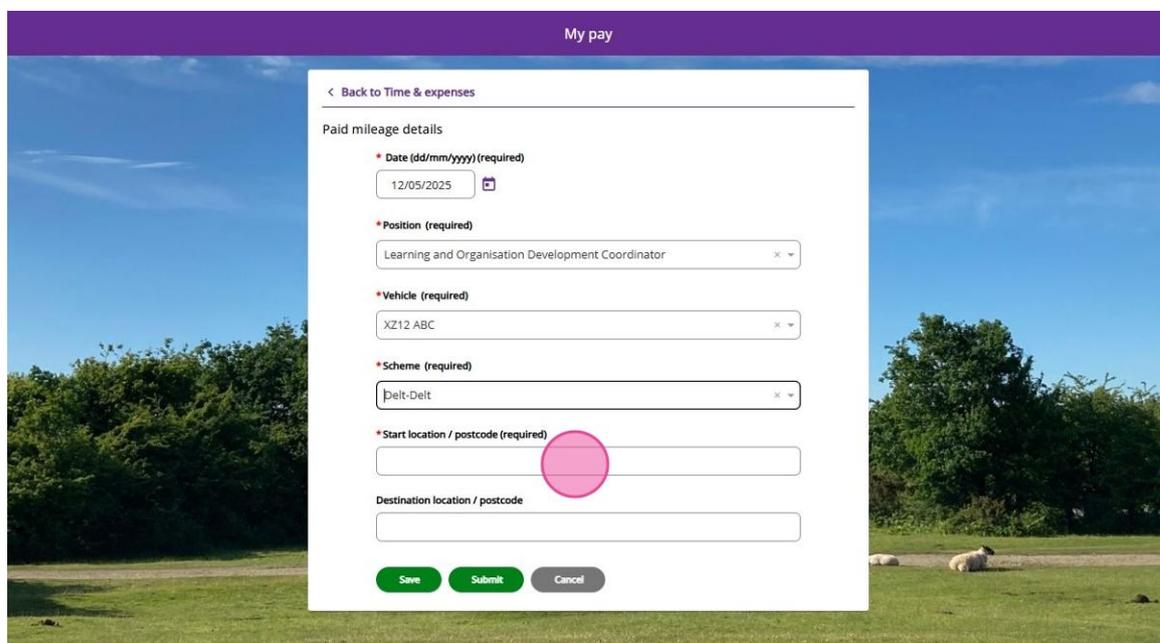


24. Scroll to the paid mileage widget box, and click **"Add paid mileage"**.



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 Derriford  
Delt Shared Services Ltd  
2 Derriford Park  
Derriford Business Park  
Derriford  
PLYMOUTH  
PL6 5QZ  
UNITED KINGDOM

Destination location / postcode  
Plymouth City Council Ballard House 26 West Hoe Road PLYMOUTH PL1 3B  
Plymouth City Council  
Ballard House  
26 West Hoe Road  
PLYMOUTH  
PL1 3B  
UNITED KINGDOM

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.

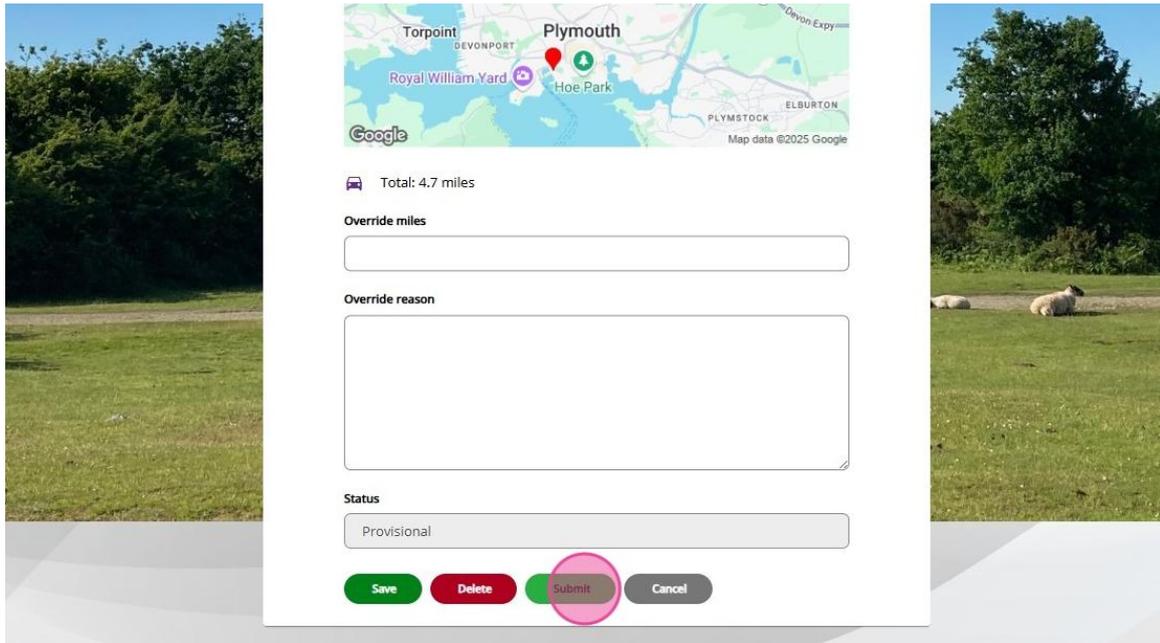
Total: 4.7 miles

Override miles

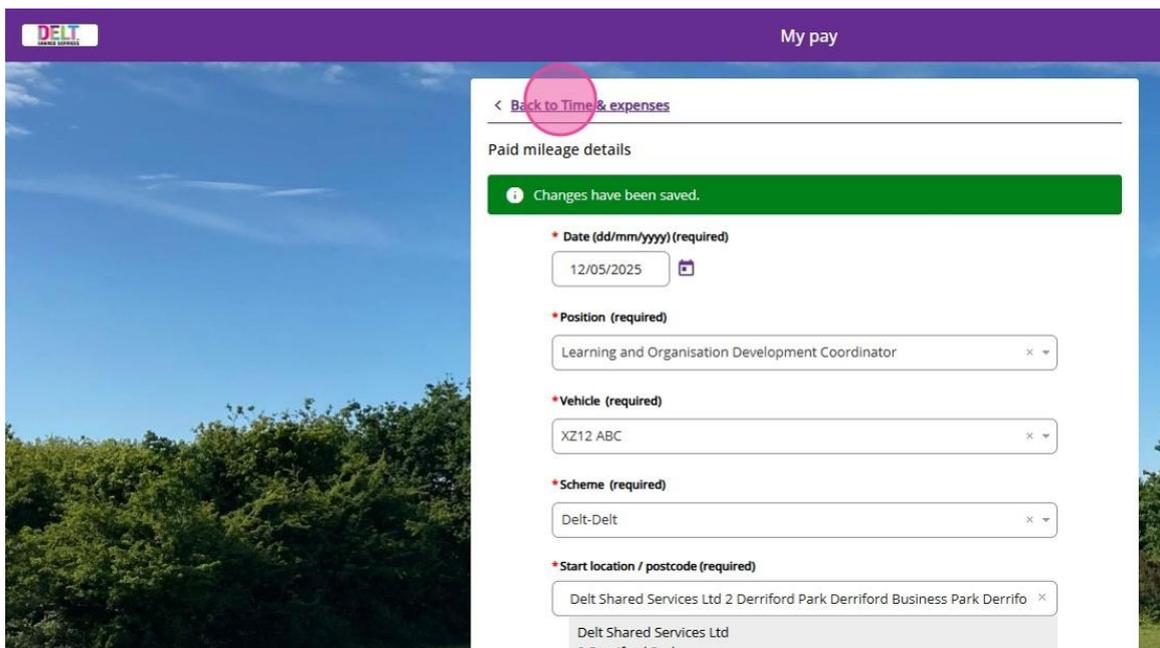
Override reason

Status  
Provisional

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



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



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

Expenses Claim Form authorisation

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Z\_DELT Mileage & Expenses Claim Form 19 Mar 2025 DELTAFO0000019 Awaiting authorisation Summary

+ Add claim

### Paid mileage

✓ In progress
Authorised

Start date (dd/mm/yyyy) (required) 📅  
13/02/2025

End date (dd/mm/yyyy) (required) 📅  
13/05/2025

Search
Clear search

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

+ Add paid mileage

↑ Back to the top



18	19	20	21	22	23	24	25
26	27	28	29	30	31		

My events

13 May 2025

No events to display