Expenses
Questions and Answers
November 2018

Implementation

- **Why is this change being made?**
  Our current contract with Selenity (current e-Expenses provider) has come to an end and moving to the new system will deliver cost savings for NHSBT as well as reducing the overall number of systems we use.

- **Is this change being made for everyone?**
  Yes.

- **What support will I get?**
  Comprehensive guidance and videos will be available covering the claiming and approving of expense claims will be available on Travel and Expenses page on People First in November.

- **What do I do with the old expenses app?**
  Remove or uninstall the app from your device(s).

- **Can I install the new app on any smart phone?**
  The new app is compatible with all Android and iPhone smartphones except Microsoft, however you can log onto the EASY system direct using your Microsoft phone.

- **Is the route calculator changing?**
  Yes, the new system uses Google maps to calculate the recommended mileage and you will also be able to see a map of your journey.

- **Who can access the system?**
  Access to the system is strictly restricted and can only be accessed by individuals who are active on ESR. Individuals are responsible for creating and changing their own passwords. These should be kept confidential.

- **Is the system secure?**
  EASY Expenses meets all the requirements for data protection. The site is secure and has been checked by NHSBT IT.

- **Will I be able to see session venues when inputting my claim?**
  No, the sessions have not been loaded into EASY. You will need the postcode when inputting your claim, you may also save these as a favourite place.

- **Will I be able to see hotels when inputting my claim?**
  No, you will need the postcode of your hotel when inputting your claim. You will then be able to save these as a favourite.

Claimants

- **Do I have to be approved to use my car for recall to work?**
  No, you just complete the existing **form**, as you do now, so that your car is set up in the system to enable you to claim.

- **Do I have to register my car for using my own car for business travel?**
  Yes, you must register your car with our Grey Fleet provider Knowles associates, before using it for business travel. More information can be found on **People First**.

- **How do I access the new EASY Expenses?**
  Log into EASY system using the username and password you currently use for accessing EASY to book annual leave, access payslips etc. You will now see a new expenses section.

- **My Password has expired/I have forgotten my password and/or Username**
  Click on the 'forgotten details' button on the left-hand side of the main logon screen. You will be prompted to input an NHSBT email address or assignment number. The system will email you with a link to enable you to reset your password. Your username is your 8-digit assignment number

- **Expenses states that my account is locked?**
  You may have entered your log on details incorrectly times than permitted. Use the 'Forgotten Details' (as above) to unlock your account.

- **My Password has expired/I have forgotten my password and/or Username and I don't have access to my NHSBT e-mail?**
  Contact HR Direct on 0117 322 7700, who will assist in resetting your account.

- **The computer will not connect to the EASY website?**
  First check that the https web address at the top of your screen is correct (this should be https://nhsbt.easy.giltbyte.com/user/login/) and that you have access to the internet.

  If you continue to have problems, then contact NHSBT service desk (internal 58777)

- **How do I claim if I do not have access to the system, do not have a computer at home and do not go to a base?**
  You can access the system from any internet connection which could be from an alternative work computer, library, internet cafe or friends/relatives home.

- **How do I claim?**
  Guidance on how to claim business expenses you have incurred can be found on the Travel and Expenses page on People First.

- **Will the system change affect when I get paid my expenses?**
  No. All expenses will be paid as normal in your salary. To check the deadlines, go to People First.

- **How do I download the new app?**
  Comprehensive guidance including how to download the app will be available on the Travel and Expenses page in People First in November.

- **How will I know if my expenses have been authorised?**
  The expenses will move from ‣ Submitted Claims (0) to ‣ Accepted Claims (0) .

- **How will I know if my expenses have been rejected?**
  The expenses will move from ‣ Submitted Claims (0) to ‣ Rejected Claims (0) .

- **Can I cancel an expense item claim once it has been made?**

If it has not been authorised, you will be able to **Withdraw** your expense item.

- **Can I cancel an expense item claim once it has been authorised?**
  No. You need to make a negative claim to reverse this out.

- **Who will authorise my expenses?**
  Your manager will usually be the person approving your expenses. You can check who can authorise your expenses, timesheets, annual leave etc…by clicking on **My Access** from the Self-Service menu. Use the drop-down boxes on the 'Who can' banner to see who can authorise.
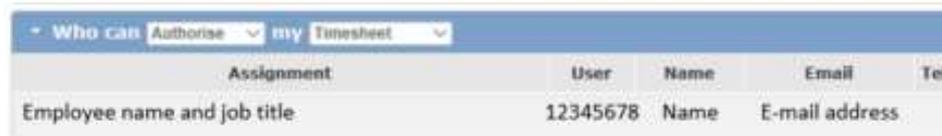
* Who can Authorise ∨ my Timesheet ∨				
Assignment	User	Name	Email	Tel
Employee name and job title	12345678	Name	E-mail address	

- **The person that my claim is being sent to for authorisation is wrong?**
  The information is linked to your position in ESR and is downloaded into *expenses* from ESR. Please contact HR Direct if you require assistance under these circumstances.

- **My Manager has not authorised my claim?**
  You should contact your manager and ask him/her to authorise your claim.

- **My manager has not received an email to authorise claims?**
  Your manager's email address may be incorrectly recorded, or no email address has been recorded in the system. Managers can check in EASY at any time to see if there are any expenses that are awaiting approval. If you are aware of the problem, then you should contact your manager and ask him/her to authorise your claim.

- **What do I do if my authoriser is off for some reason?**
  You could wait for your manager to return for the claim to be authorised for payment, if this is likely to be before the deadline. However, if the absence falls over the submission dates or is likely to be longer term, the budget manager may authorise a temporary alternative authoriser. Please contact HR Direct if you require assistance under these circumstances.

- **My Manager is on holiday and did not request a temporary change of authoriser?**
  You could wait for your manager to return for the claim to be authorised for payment, if this is likely to be before the deadline. However, if the absence falls over the submission dates the budget manager may authorise an alternative authoriser on a temporary basis in the system.

- **I have been off work and did not submit my claim before the transfer to the new expenses system, will this still be paid?**
  Any claims not submitted and approved before the move to the new system will need to be entered in EASY expenses and authorised for payment.

- **Do we still have to attach receipts electronically?**
  Yes, all receipts need to be attached electronically to the claim.

- **Can I access and enter my expenses from Home?**
  Yes, enter the following URL: **https://nhsbt.easy.giltbyte.com/user/login/** into your browser log on as normal to access the system, alternatively you can use the EASY companion app to enter your expenses and attach receipts.

- **My base location is incorrect on the system, how do I update this?**
  Your base is linked to your position in ESR; this information is downloaded into EASY via ESR. Any corrections require completion of an establishment control form by your line manger to correct the position information held by ESR.

- **My home address is incorrect on the system, how do I update this?**
  The expenses system data is populated by ESR, all data must be updated in ESR before the changes are active in EASY expenses. You can change your address via your My ESR login.

- **How do I claim mileage if I have two cars?**
  When entering your claim for business miles there will be a drop-down box under the Expenses Type Vehicle section where you can pick which car you wish to use in your claim.

- **How do I enter details of journey by car?**
  The system holds NHSBT sites and session venues, you will be able to search for the location you want using the magnifying glass icon. Alternatively, you can set up a favourite place which can then be selected from your favourite place list.

  If you enter 'home' / 'base' the system will automatically enter the details for either your home or base address.

- **What do I do if the system is calculating wrong number of miles for a journey I have made?**
  The system calculates the journey length by using Google maps and the rules relating to journeys made to/from home in line with NHS TCS and the NHSBT travel and expenses policy. The calculation is based on the recommended route; there may be some variances to the actual length of a journey. In these cases, override the mileage calculated.

- **How do I claim excess mileage?**
  Excess mileage can be claimed via *expenses*. If you are unable to claim your excess mileage, please contact NHSBT HR Direct. Your excess travel will be set up in the system once a copy of your agreement has been received and verified.

- **How do I print my claim?**
  You do not routinely need to print your claim as it will be sent, authorised and allocated for payment electronically.

  If you wish to print for your own records, then within the claim screen right mouse click and then select print from the options. Don't forget that you can access your previous claims from the View Archived Claims at the top right of the claim screen.

- **The amount paid on my payslip is not the same as that shown on expenses?**
  Please check in EASY that your claim was extracted for payment and if necessary raise a query with HR Direct on 0117 322 7700 if you want any specific payments to be checked.

- **What is the deadline for travel claims this month?**
  The deadlines are published on the Travel and Expenses page on People First.

- **When will I be paid?**
  Authorised expenses claims are downloaded from *expenses* in line with the published timetable.

- **My Car details are wrong?**
  If your car is for 'Return to Work' only, please complete new vehicle notification – not for business use form.

  If your car is for claiming Business Mileage, ESR Pay Support will be notified when your car has been 'Grey Fleet' registered. Please refer to the Grey Fleet guidance, on People First, for more information.

On receipt of notification of your new details your car will be automatically updated once the change is actioned in ESR. The data is updated daily.

- **Can I see my previous claims?**
  Yes, you can access previous claims from View Archived Claims at the top right of the expenses screen.

- **Can I track the progress of my claims?**
  Yes, you can do this by looking at the Expenses claims screen, a claim which has been submitted will move into the Submitted Claims section when you submit it and then into the Accepted Claims section once your manager has authorised it. Claims in the Submitted Claims section have been submitted but are not yet authorised by your line manager.

- **I did not receive an email confirming that my payment was authorised?**
  The system does **not** send you an email confirming authorisation – however you can check in your claims screen within **expenses** at any time to monitor progress of your claims.

- **My manager has rejected my claim and I do not agree?**
  You should discuss this with your manager in the first instance with reference to the NHSBT travel policy and if not resolved then contact HR Direct.

- **What does a manger do if an expense is flagged?**
  The manager should check all flagged items and be satisfied that expenses items justifiably exceed the policy limits or that additional mileage claimed is a 'reasonable variation' to the recommended distance before authorising for payment.

  If the manager is not satisfied he/she may query/return or delete items. Claimants will be notified by email and within **expenses**.

- **Where should I send my receipts?**
  Receipts must be attached to your claim, you may wish to retain the actual receipts for your own records.

- **I have lost my receipt(s)?**
  You should claim the item under the unreceipted expense item, please note this will be taxed.

- **How do I claim for an expenses item that is not on the list?**
  If the item you wish to claim is not in the expenses item list it could be that it cannot be claimed though expenses, send the details of the item you wish to claim to the HR Direct who will advise on how the item should be claimed.

- **How do I claim if I have travelled on business by pedal cycle?**
  Please select 'pedal cycle miles' from the drop-down list of expense items when inputting your expense claim and enter the number of miles travelled by pedal cycle.

- **How do I claim for expense items for dates before the 1st of December in EASY?**
  You will need to raise an HR Direct query, who will be able to arrange access (set time) for you to enter back dated claims into EASY.

- **Can I delegate my PA to input my expense items into the expenses system on my behalf?**
  Yes, you will be able to delegate inputting your claims. Under the Self Service banner on the left hand menu bar click on 'My Access'. For the Self Service.Expense activity you will see at the end of the line under Delegate a small person icon. Click on the icon to set up your delegate.

▼ My Access			
Activity	**Right**	**Data Limits**	**Delegate**
Self Service.Expenses			👤

Search for the employee you wish to delegate to and enter the start and end dates of the delegation period (we recommend you set this at a few years if the access if for long term). Save. Once set up you can see your delegate under the Delegated Access banner.

Delegated Access					
Delegated To	Activity	Right	Effective From	Effective To	
Delegates name	Self Service.Expenses		27 Nov 2018	30 Nov 2018	

If you do not see the delegate icon raise a query with HR Direct who will arrange for you to have access to the delegate function.

- **I am a PA and have been given access to input expenses into the system on behalf my manager – how do I input these?**

When you log into EASY using your own log in you will be able to choose to input claims for your manger by selecting their name from the drop-down box at the top of the screen.

Expenses for
Employee name (98765432): Job title (no claims)
Employee name (98765432): Job title (no claims)

Please select an assignment.

If you do not see your managers name, go to the Self Service menu and under 'My Access' to check who has set you up as their delegate under the 'Received Access Delegations' banner. Contact your manager to have them set you up as a delegate if they have not yet given you access.

Received Access Delegations				
Delegated By	Activity	Right	Effective From	Effective To
Managers name	Self Service.Expenses		2018-12-05	2018-12-06

Approvers

- **How do I access the new EASY Expenses?**
  Log into EASY system using the username and password you currently use for accessing EASY to book annual leave, access payslips etc. You will now see a new expenses section.

  - Self Service
  - Management
    - Time & Attendance
    - Absences
    - Expenses

- **Can I view previous expenses for my team?**

Yes. You will be able to view previous claims back to April 2017. Click on the **View Historical Claims** button when in the claimant's expenses screen or wherever you see the [ ] icon.

- **I am a manager going on annual leave, can somebody approve expenses claims on my behalf?**
  Yes, you will be able to transfer your approval rights whilst you are on leave. Where you see the delegate icon [Delegate icon] in the Self Service [My Access icon] section you will be able to delegate access to another supervisor for that activity.

- **I have had an email advising that a claim has been submitted for payment, but I cannot see in the system?**
  The claimant may have 'un-submitted or withdrawn' the claim item(s) – for example if they have submitted in error. Please check with the claimant before raising a query with HR Direct.

- **A claimant has told me they have submitted a claim, but I have not received an email and it is not in the system?**
  The line manager for the claimant may be incorrect. The claimant can check who can authorise their claim via the menu bar under the Self Service 'My Access' section.
  Contact HR Direct for assistance in any specific cases where authorisation will be a problem.

- **Can claims be authorised remotely?**
  Yes, you can authorise claims from anywhere you have access to EASY expenses. That is from any internet connection which could be from a work computer, at home, library, internet cafe, mobile via WIFI or friends, relative's home.

- **Can claims be authorised using the App?**
  No, using the App. You can authorise claims remotely from a smart phone or tablet by directly logging into EASY expenses.

- **How do I authorise claims remotely?**
  Logon directly into the EASY system using URL address:
  https://nhsbt.easy.giltbyte.com/user/login/

- **Can I reject part of an expense claim?**
  Yes, you can reject one or several expenses lines. To reject items, you must ensure that the tick box on the left-hand side of each row is ticked and then click reject input the rejection reason and then reject.

- **Will I still receive an e-mail notification to let me know that one of my staff has submitted a claim?**
  Yes, you will receive an email which may contain several submission requests from the system at set time intervals.

- **Will I now get e-mail notifications for annual leave and timesheets in EASY?**
  Not immediately. Unfortunately, it is not straight-forward to set up for annual leave and timesheets. Please be assured that we are working with the system supplier to put this in place as soon as we can.

- **Can I delegate another manager/supervisor to authorise claims whilst I am on holiday?**
  Yes, you will be able to delegate authorisation rights for a set period. Under the Self Service banner on the left hand menu bar click on 'My Access'. For the Expenses.Claims activity you will see at the end of the line under Delegate a small person icon. Click on the icon to set up your delegate.

| My Access | | | |
Activity	Right	Data Limits	Delegate
Expenses.Claims	Authorisation	Organisation: 918	👤

Search for the employee you wish to delegate to and enter the start and end dates of the delegation period. Save. Once set up you can see your delegate under the Delegated Access banner.

Delegated Access					
Delegated To	Activity	Right	Effective From	Effective To	
Delegates name	Self Service.Expenses		27 Nov 2018	30 Nov 2018	

If you do not see the delegate icon raise a query with HR Direct who will arrange for you to have access to the delegate function if appropriate.