

IMPORTANT Before you start:



Make sure you have a **receipt** and/or copy of your **confirmation of payment**



Find out who your **approver** is (this might be your line manager but check with them or your local HR hub if you're not sure)



Find out what **account code** your reimbursement will be paid from (this is a local account and is normally the account that pays your salary but, again, please check with your line manager or local HR hub if you're not sure)

FIRSTLY:

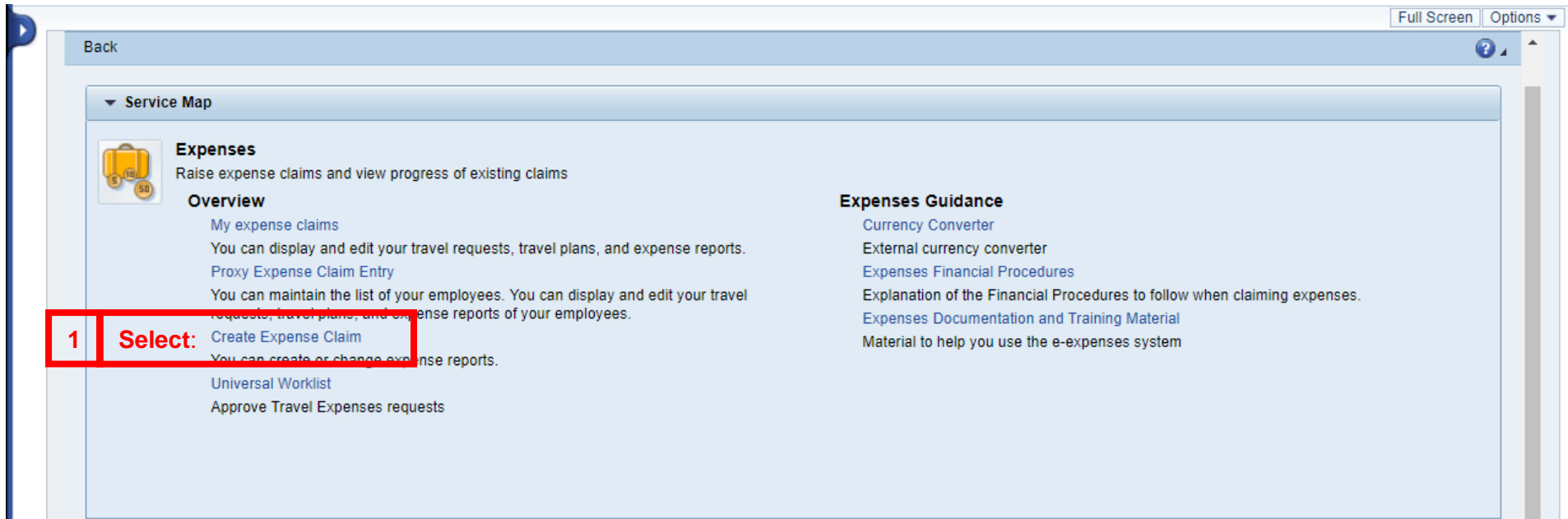
Log into **Employee Self-Service** - https://hr.leeds.ac.uk/info/2/staff_information/274/employeemanager_self_service_information.

If you're not on campus, you'll need to either:

- log in via **Desktop Anywhere** or, if you can't access Desktop Anywhere,
- use our **Virtual Windows Desktop** (see the [IT website](#) for how to do this).

Once you're logged in, click on **Expenses**.

THEN:



The screenshot shows the 'Expenses' section of the Employee Self-Service interface. The page has a 'Back' button and 'Full Screen' and 'Options' controls in the top right. The main content area is titled 'Service Map' and contains the following sections:

- Expenses**: Raise expense claims and view progress of existing claims. Includes an icon of a wallet with coins.
- Overview**:
 - [My expense claims](#): You can display and edit your travel requests, travel plans, and expense reports.
 - [Proxy Expense Claim Entry](#): You can maintain the list of your employees. You can display and edit your travel requests, travel plans, and expense reports of your employees.
 - 1 Select: [Create Expense Claim](#)**: You can create or change expense reports.
 - [Universal Worklist](#): Approve Travel Expenses requests.
- Expenses Guidance**:
 - [Currency Converter](#): External currency converter
 - [Expenses Financial Procedures](#): Explanation of the Financial Procedures to follow when claiming expenses.
 - [Expenses Documentation and Training Material](#): Material to help you use the e-expenses system

Self Service ORCID

Overview Full Screen Options ▾

Create Expense Report [Help](#)

Employee

3 Select:

Claim Type Selection

2 Select: Claim Type:*



Self Service

ORCID

Overview

Full Screen Options

Create Expense Report

[Help](#)



Employee Schema Non Travel

Previous Step Next Step Save Draft

General Data

Start Date:*

From Date:

To Date:

4 Enter the **start and end dates of your visa** and change the times to 00:01 (for ILR applications, enter the start date and select the following day as the end date)

Approver
Approver:* **5**

Additional Information

Progress:

Purpose of Claim:*

Cost Assignment:*

Previous Step Next Step Save Draft

Personal Value List: Personnel number

Personal Value List: There are 1 entries for Approver

7 If not, select: All Values Edit Personal Value List

Last name	First name	Title	Org.Unit Short Text
			Human Resources

6 If your approver's name is listed, just click on it

OK Cancel

All Values: Personnel number

Search Criteria Personal Value List Hide Search Criteria

7a Enter

Last name:

First name:

Restrict Number of Value List Entries To

7b Select:

OK Cancel

All Values: Personnel number Personal Value List Hide Search Criteria

Search Criteria

Last name: →

First name: →

Restrict Number of Value List Entries To

Results List: 93 results found for Approver

Last name	First name	Title	Org.Unit Short Text
Smith			
Smith			
Smith			
Smith			
Smith			
Smith			
Smith			
Smith			
Smith			
Smith			

7c Click on the right entry in the list

7d Select:

Self Service ORCID

Overview Full Screen Options

General Data

Start Date: * 15.03.2019

From Date: 18.03.2019 00:01

To Date: 19.03.2019 00:01

Approver

Approver: *

Additional Information

Progress:

Purpose of Claim: * **8 Enter "Visa reimbursement" and the type of visa you have – eg Visa reimbursement – Tier 2**

Cost Assignment: * **9 Select:**

Self Service ORCID Overview Full Screen Options

Create Expense Report Help

1 a 1 2 3 4
 General Data Cost Assignment General Data Enter Receipts Review and Send Completed

Employee Schema Non Travel Start Date 15.03.2019 End Date 15.03.2019

Previous Step Next Step Save Draft

Cost Assignment for Trip

New Entry Check Delete

Cost Assign (%)	Company Code	Accounting Object	Accounting Object Value
100.00	University of Leeds	All	

Cost Center (e.g. 123456):

Order (e.g. 12345678):

WBS Element (e.g. RG.ABCD.123456):

Accept Accept and New Entry Check Delete

11 Select:

10a If your code has 6 numbers, enter it in this box

10b If your code has 8 numbers, enter it in this box

10c If your code has numbers and letters, enter it in this box

12 Select:

Cost Assignment Table

Note:
 Step 11: If the cost of your visa will be **split between more than one account**, click **Accept and New Entry** and **repeat step 10**
 Once you've finished adding account codes, go to **step 11**



Self Service

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Overview

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Help



Employee Schema Non Travel

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Check was successful

General Data

Start Date: *

From Date:

To Date:

Approver

Approver: *

Additional Information

Progress:

Purpose of Claim: *

Cost Assignment: *

13 **Select:**

Create Expense Report



Employee Schema Non Travel Start Date 18.03.2019 End Date 18.03.2019

◀ Previous Step Next Step ▶ Save Draft

Receipts in This Expense Report

No.	Status	Expense Type	*Receipt Amount £	Receipt Date	Paper Receipt

◀ Previous Step Next Step ▶ Save Draft

14 **Select:**

Self Service ORCID

Overview Full Screen Options

Receipts in This Expense Report

Add Receipt Copy Delete

No.	Expense Type	Receipt Amount £	Receipt Date	Paper Receipt
001	<div style="border: 1px solid red; padding: 2px;"> <p>15 Click the drop-down arrow:</p> </div> <ul style="list-style-type: none"> Profess Fees-Off HMRC List 3 Profess Fees-On HMRC List 3 Relocation - Allowable Relocation - Non Allowable Utilities VISA - No Tax/NI VISA - Tax and NI <div style="border: 1px solid red; padding: 2px; margin-top: 5px;"> <p>16 Select: Or:</p> </div>	<div style="border: 1px solid red; padding: 2px;"> <p>17 0.00</p> </div>	<div style="border: 1px solid red; padding: 2px;"> <p>18</p> </div>	<input checked="" type="checkbox"/>

Enter the **cost of your visa** in GBP (£sterling) – the amount should be the cost of your standard online or postal application only; if you have any other costs, they might be covered by the [interest free loan scheme](#)

Enter the **date** – this should be the **date of your receipt, or your first day of employment** if you applied for your visa before you started work at the University

Previous Step Next Step Save Draft

Note

- Step 16: If you applied for your visa outside the UK, select **VISA – No Tax/NI**.
 If you applied for your visa in the UK, select **VISA – Tax and NI**
 If you select the wrong option, the system won't let you change it, so click **Delete** and then **Add Receipt** again

Create Expense Report



Employee [] Schema Non Travel Start Date 18.03.2019 End Date 18.03.2019

Previous Step Next Step Save Draft

Receipts in This Expense Report

Add Receipt Copy Delete

No.	Status	Expense Type	*Receipt Amount £	Receipt Date	Paper Receipt
001		VISA - Tax and N	604.00	10.03.2019	<input checked="" type="checkbox"/>

VAT Status: No VAT charged (no VAT recov possible)

Description: *

19 Enter the type of visa and the start and end dates (eg Tier 2 visa 01/01/2019 - 31/12/2024)

20 Select:

Accept Accept and New Entry Change Cost Assignment Enter Itemization Check Copy Delete



Self Service

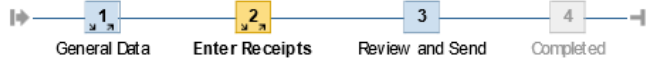


ORCID

Overview

Full Screen

Create Expense Report



Employee Schema Non Travel Start Date 18.03.2019 End Date 18.03.2019

[Previous Step](#) [Next Step](#) [Save Draft](#)

Receipts in This Expense Report

[Add Receipt](#) [Copy](#) [Delete](#)

No.	Status	Expense Type	*Receipt Amount £	Receipt Date	Paper Receipt
001	<input checked="" type="checkbox"/>	VISA - Tax and N	604.00	10.03.2019	<input checked="" type="checkbox"/>

21

Select:

[Next Step](#)

[Save Draft](#)



Self Service

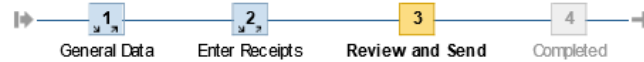


ORCID

Overview

Full Screen

Create Expense Report



Employee Schema Non Travel Start Date 18.03.2019 End Date 18.03.2019

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Final Action

- Save Draft I only want to save my expense report and send it later
- Save and Send for Approval I want to save my expense report and send it now for further processing
- I certify that the expenses claimed were necessarily incurred in connection with business on behalf of the University, are within the prevailing scale of allowances approved by the University and have not previously been paid

Summary

Total Individual Receipts	604.00 GBP
Total Travel Expenses	604.00 GBP
Amount Reimbursed	604.00 GBP
Amount Paid Out	604.00 GBP

Cost Assignment

604.00 GBP , Company Code UNV (University of Leeds),

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Select:

Next Step

GUIDANCE WHILE THE UNIVERSITY CAMPUS IS CLOSED:

- 23 Create a PDF copy of your claim** (click Print and select a PDF writer, eg Microsoft Print to PDF) **and save it. Do the same thing for your receipt(s) if you can** (or you can take a photo of them if they're not digital) **and email the claim and your receipts to your Faculty or Service finance department** for processing.

- 24** Once you are able to come to campus, you'll need give **a printed copy of the claim, and your original receipt(s)** to your finance department.