



Cymedd i'r Arfordir
Valleys to Coast

Trent Time & Expenses claim guidance

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1. Logging In

Using the link below you will be able to login to the iTrent system.

https://ce0181li.webitrent.com/ce0181li_ess/ess/#/login

Firstly, you will be presented with the screen below;

Your username and Password will be provided to you by a member of the People Team by email.

If you have not received these – Please contact
People@v2c.org.uk

Employee Self Service

iTrent

Login

* Username (required)
CWADLEY

Forgotten username?

* Password (required)

Forgotten password?

Login

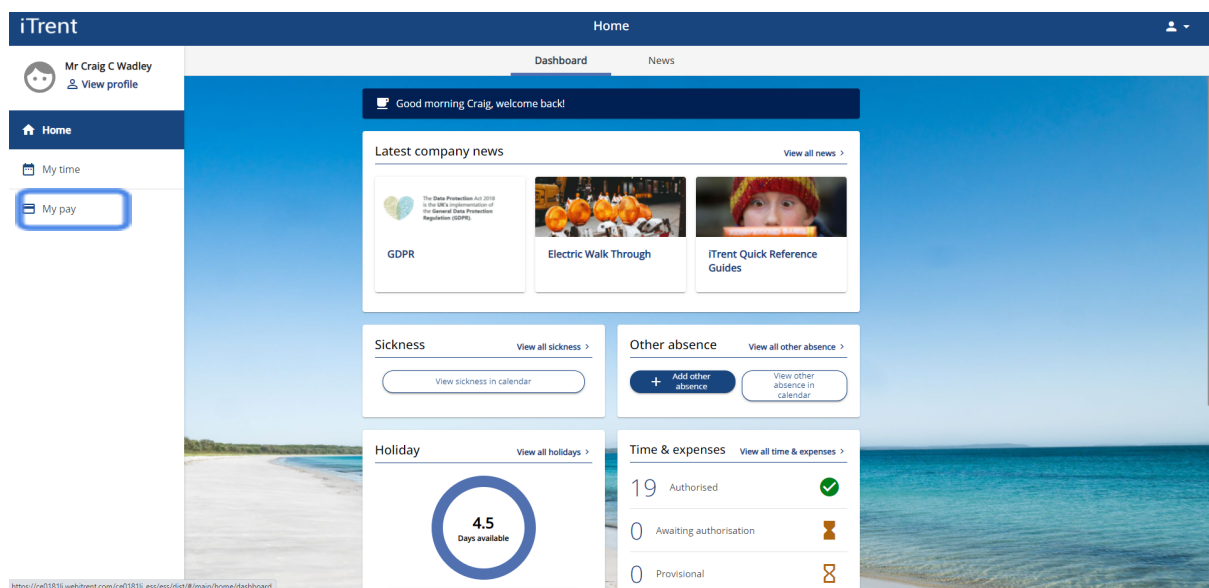
Contact administrator



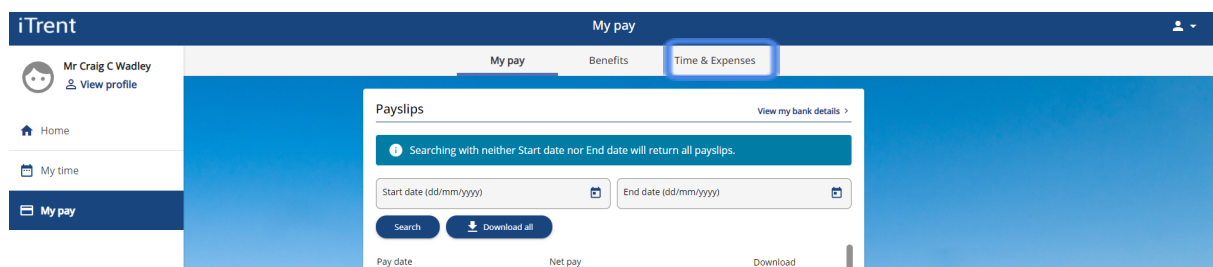
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2. Navigating to the Time & Expenses form

Once logged in, you will be presented with this screen below. Click on the 'My Pay' section on the left hand side menu



On the 'My Pay' menu select 'Time & Expenses'





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Finally select 'Add Claim' from this menu.

The screenshot shows the iTrent web application interface. The top navigation bar includes the iTrent logo, the user name 'Mr Craig C Wadley', and a 'View profile' link. The main navigation menu on the left has options for 'Home', 'My time', and 'My pay', with 'My pay' currently selected. The main content area is titled 'Time & Expenses' and features tabs for 'My pay', 'Benefits', and 'Time & Expenses'. The 'Time & Expenses' tab is active, displaying a form with 'In progress' and 'Authorised' status buttons. Below these are input fields for 'Start date' (25/02/2022) and 'End date' (25/03/2022), followed by a 'Search' button. A message states 'There are no Time & Expenses claims to display', and a red circle highlights the '+ Add claim' button. Below this is a 'Saved journeys' section with a 'Journey name' input field, an 'Active status' dropdown menu (set to 'Active'), a 'Search' button, and a message 'No personalised journey details have been added yet', with a '+ Add saved journey' button highlighted.



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3.Starting a new claim

You will then be presented with this screen below –

Time and expenses

Time & Expenses claim entry: New

Start date

Job title

Assistant Finance & Tax Manager

Claim template

Please choose

These forms are not to be completed by Trade employee's as their claims continue to be manually processed at this time. This will be updated in the future following a second roll out of Self Service.

New

Under start date, enter date the claim relates to (date cost was incurred).

The Job title is fixed within your profile. So on the screenshot above, job title shows is Assistant Finance & Tax Manager

Under 'Claim template' select 'New – Mileage and Expenses Claim'.



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Once populated, screen will look like this –

Time and expenses

X

Time & Expenses claim entry: New

Start date

03/03/2020

X

Job title

Assistant Finance & Tax Manager

▼

Claim template

New - Mileage and Expenses Claim

▼

These forms are not to be completed by Trade employee's as their claims continue to be manually processed at this time. This will be updated in the future following a second roll out of Self Service.

New

Next click on 'New' , which will take you to the screen shown in the next section.



4. Completing the claim form

The first line of this form is for mileage claims and the second is for non-mileage related claims., e.g. expenses incurred such as car parking, train tickets & general expenses.

Time and expenses

X

Time & Expenses claim entry: (New)

Job title: Assistant Finance & Tax Manager
Employee: Mr Charles Sibanda

Page 1

Element	Date	From / To	Places Visited	Reason	Miles Claimed
	v				0.00

Element	Date	Nature of Expense	Reason	Expenses
	v			0.00

Save draft

Submit

Print



If you are claiming mileage, then under 'Element', select 'Mileage Non NI'. If you carry a passenger, in the drop down there is an option to select 'passenger mileage'.

If you are claiming any further travel related expenses, then these are entered on the bottom half of the page -below the mileage section.

Time and expenses

X

Time & Expenses claim entry: (New)

Job title: Assistant Finance & Tax Manager
Employee: Mr Charles Sibanda

Page 1

Element	Date	From / To	Places Visited	Reason	Miles Claimed
					0.00

+

-

Element	Date	Nature of Expense	Reason	Expenses
				0.00

+

-

Save draft

Submit

Print



The '+' sign gives you the option to add additional claim lines and the '-' deletes these lines.

Below you can see an example of claim once fields have been populated

Time and expenses

X

Time & Expenses claim entry: (New)

Job title: Management Accountant
Employee: Mr Charles Sibanda

Page 1

Element	Date	From / To	Places Visited	Reason	Miles Claimed	
Mileage Non NI	07/07/2021	xxx	xxx	xxx	45.00	+ -
Mileage Non NI	15/08/2021	xxx	xxx	xxx	47.00	+ -
Passengers Mileage	15/08/2021	xxx	xxx	xxx	47.00	+ -
					139.00	

Element	Date	Nature of Expense	Reason	Expenses	
Miscell Exp	15/09/2021	stamps	postage	1.20	+ -
Professional Fees	15/09/2021	acca	professional membership	145.00	+ -
				146.20	

Save draft

Submit

Print



In the Example claim shown above, the No. of miles travelled are entered manually and the system will automatically calculate the monetary value during payroll processing

If you don't want to submit the claim immediately, you can save it as draft, to come back to later and amend.

Time and expenses

X

Time & Expenses claim entry: (New)

Job title: Management Accountant
Employee: Mr Charles Sbanda

Page 1

Element	Date	From / To	Places Visited	Reason	Miles Claimed	
Mileage Non NI	07/07/2021	xxx	xxx	xxx	45.00	+ =
Mileage Non NI	15/09/2021	xxx	xxx	xxx	47.00	+ =
Passengers Mileage	15/09/2021	xxx	xxx	xxx	47.00	+ =
					139.00	

Element	Date	Nature of Expense	Reason	Expenses	
Miscell Exp	15/09/2021	stamps	postage	1.20	+ =
Professional Fees	15/09/2021	acca	professional membership	145.00	+ =
				146.20	

Save draft

Submit

Print



Once entries have been completed, click on 'Submit' on the bottom right hand corner, and you will be taken to the screen shown in the next section.

Time and expenses

X

Time & Expenses claim entry: (New)

Job title: Management Accountant
Employee: Mr Charles Sibanda

Page 1

Element	Date	From / To	Places Visited	Reason	Miles Claimed		
Mileage Non NI	▼ 07/07/2021	xxx	xxx	xxx	45.00	+	=
Mileage Non NI	▼ 15/09/2021	xxx	xxx	xxx	47.00	+	=
Passengers Mileage	▼ 15/09/2021	xxx	xxx	xxx	47.00	+	=
					139.00		

Element	Date	Nature of Expense	Reason	Expenses		
Miscell Exp	▼ 15/09/2021	stamps	postage	1.20	+	=
Professional Fees	▼ 15/09/2021	soca	professional membership	145.00	+	=
				146.20		

Save draft

Submit

Print



5. Submitting a claim

Once you have selected 'Submit' on a claim – you then have an option of attaching receipt if applicable as proof of spend e.g., car parking receipt.

Before pressing 'Submit'. You re-enter your iTrent password. Claim is then sent to your delegated authoriser (line manager).

Time & Expenses claim submission:

Claim template
New - Mileage and Expenses Claim

Job title
Assistant Finance & Tax Manager

Time and expenses claim reference
ME000111

Payroll
V2C Payroll

Start date
03/03/2020

Cut off date
11/03/2020 - This claim will not now be paid until 18/04/2020.

Comments
By submitting this claim you are certifying that you hold a valid driving licence and MOT certificate (if your car is more than 3 years old), that you are insured to undertake business mileage, and that the vehicle excise duty has been paid. You further certify that the vehicle is regularly maintained and in a road-worthy condition, and that all the details of this claim are correct and in accordance with V2C's Expenses Policy

Password

☐ **Receipt attachments**

Receipt type

Attach receipt





6.General guidance

Eligible millage

You can claim for the total mileage on business trips. However you can't claim for your ordinary commute between home and your 'normal place of work' or where your business journey is fewer miles than your ordinary commute.

Your normal place of work is the place(s) you go regularly to perform your duties e.g. anywhere you visit regularly on a permanent basis as part of your employment duties.

If your role requires you to travel using your own vehicle to other locations e.g. customer properties, sheltered schemes etc. during your contracted working hours you may claim for this mileage as long as you have deducted the mileage as mentioned in point one.

Cut off times

Payroll, mileage and expenses cut off calendar is circulated to colleagues at the start of each Financial year so you are aware of cut off times. Claims processed in the relevant payroll month, will be for the previous month, for example, in the April 2022 payroll, all claims processed will be up to the end of March 2022.



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Claim processing time

All claims need to be submitted in order to be processed for payroll by the 5th of that month. Managers will then have until the 10th of that month to authorise or reject for correction any submitted claims.

Late claims

Any claims submitted or authorised after the 10th of any given month will unfortunately not be able to be processed in time for that month's pay and will automatically be scheduled for the following month's payroll.

Claim expiry and exemption

All claims must be submitted as early as possible at the beginning of the following month after they have occurred. However in exceptional circumstances such as sickness or prolonged time out of the business claims can be processed for prior months. any claims older than 3 months unfortunately can no longer be claimed for. If you have any issues with processing your claim or a claim of a member of your team please contact your People Partner.



7.Further support

For further guidance you will find two courses on our online learning platform –Taliesin, which includes video tutorials for all the features of ITrent including tutorials on the information covered above.

You can access these courses via the link below or at any time by searching ITrent in the course catalogue.

<https://v2c.learningpool.com/totara/coursecatalog/courses.php>

Dashboard / Courses / Search

Search Courses: 2 records shown

Filter by

Course Category

Is any value

Administration

Course Type

☐ Blended (0)

☐ E-learning (2)

☐ Seminar (0)

Search by

ITrent

Search

Clear

Edit this report

Create Course

Course Name	Course Summary	Category
ITrent - Self-Serve	 A video course demonstrating how to use the iTrent Self-Serve platform for managing your personal information, booking leave and viewing payslips.	General Skills
ITrent - Self-Serve & Flexi Time Mobile Workers	 A video course demonstrating how to use the iTrent Self-Serve platform for managing your personal information, booking leave and viewing payslips. Includes an overview of the Sharepoint flexi-time sheets for our mobile workers.	How to

For any technical support or issues with your claims please contact a member of the people team via people@v2c.org.uk