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 <u>check with them or your local HR hub if you're not sure</u>)

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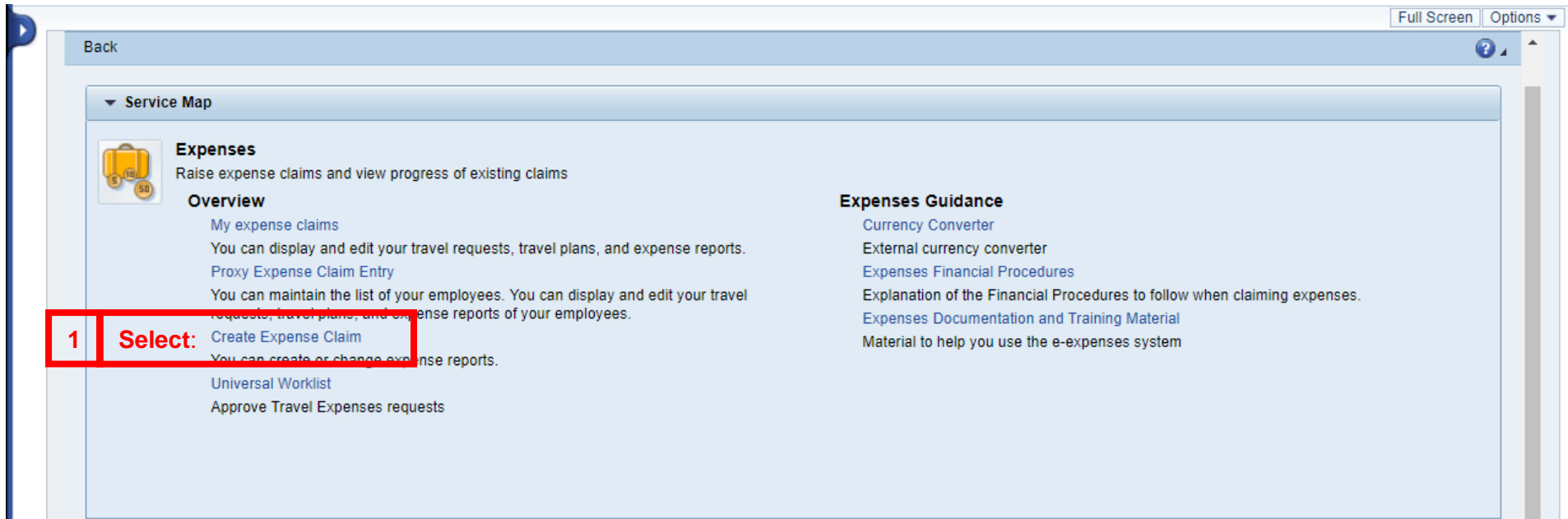
FIRSTLY:

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:

Self Service   ORCiD

Overview

Full Screen | Options ▼

Create Expense Report

Help

Employee

3 Select: Next Step

Claim Type Selection

2 Select: Claim Type:*

Non Travel

Travel & Subsistence

Overview

Full Screen | Options ▼

Create Expense Report

Help

| 1 General Data | 2 Enter Receipts | 3 Review and Send | 4 Completed |

Employee [   ]   **Schema** Non Travel

◄ Previous Step   Next Step ► | Save Draft

General Data

Start Date:*   04.03.2019

From Date: [   ] 00:00

To Date: [   ] 00:00

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**   **Select:** ▢   Add Additional Approvers

Additional Information

Progress: [   ]

Purpose of Claim:* [   ]

Cost Assignment:* [   ]   Create Cost Assignment

◄ Previous Step   Next Step ► | Save Draft

4

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 [500]

7b **Select:** Start Search   Reset

OK   Cancel

All Values: Personnel number

Search Criteria   Personal Value List   Hide Search Criteria

Last name: = SMITH   ➡
First name: ◇   ➡

☑ Restrict Number of Value List Entries To   500

[Start Search] [Reset]

Results List: 93 results found for Approver

	Last name	▲	First name	Title	Org.Unit Short Text
	Smith				
	Smith				
	Smith				
	Smith				
	Smith		**7c**	**Click on the right entry** in the list	
	Smith				
	Smith				
	Smith				
	Smith				
	Smith				

7d   **Select**: [OK] [Cancel]

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: * [_____] [_____] Add Additional Approvers

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**: Create Cost Assignment

◀ Previous Step | Next Step ▶ | Save Draft

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**

Overview

Full Screen | Options ▼

Create Expense Report

Help

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

Employee [_____]   **Schema** Non Travel

◀ Previous Step | Next Step ▶ | Save Draft

☑ Check was successful

General Data

Start Date: *   15.03.2019

From Date: 18.03.2019   00:01
To Date: 19.03.2019   00:01

Approver

Approver: *   [_____]   Add Additional Approvers

Additional Information

Progress: [_____]

Purpose of Claim: *   Example for immigration reimbursement scheme instructions

Cost Assignment: *   100.00 % , Cost Center [_____]   Create Cost Assignment

13   **Select:**   Next Step ▶ | Save Draft

Overview

Full Screen

Create Expense Report

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

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

14   **Select:**   Add Receipt   Copy   Delete

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

◀ Previous Step   Next Step ▶   Save Draft

Note

Step 16: If you applied for your visa <u>outside the UK</u>, select **VISA – No Tax/NI**.

If you applied for your visa <u>in the UK</u>, 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

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

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 NI ▼	604.00	10.03.2019	☑

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

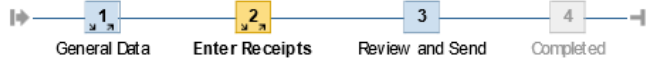**20**   **Select:** [Accept] Accept and New Entry | Change Cost Assignment | Enter Itemization | Check | Copy | Delete

12

Self Service　　ORCiD

Overview

Full Screen

Create Expense Report

| 1 General Data | 2 Enter Receipts | 3 Review and Send | 4 Completed |

| 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 NI	604.00	10.03.2019	☑

21　**Select**:　Next Step ▶ | Save Draft

13

Create Expense Report

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

Employee ▮▮▮▮▮▮▮▮▮   **Schema** Non Travel   **Start Date** 18.03.2019   **End Date** 18.03.2019

◀ Previous Step | Next Step

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 UNIV (University of Leeds), ▮▮▮▮▮▮▮▮▮

22   **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.