

Selima Expenses Guide

The Selima Expenses module is for everyone to claim for mileage and subsistence expenses incurred with travelling for work purposes. It is not for reimbursement for any other items e.g. stationery or equipment for school or work purposes – such items must be purchased using the school credit card – please see your office manager.

Getting ready to make a claim

1. It's really important that each claimant is set up correctly on Selima before making any claims – if this isn't done, any claims go horribly wrong! So, before you start, you will need scanned copies of the following:
 - Your current, valid driving licence
 - Your insurance document, showing you are covered for business mileage
 - Your current MOT certificate (if relevant)
 - You must also need to notify your school administrator of your usual home to office mileage, so they can add it to your personal record.
2. Go to your Self Service page on Selima - <https://live.selima.co.uk/EborAcademyTrustSecure/#>
Select 'Expenses'
3. Go to the box called 'Vehicles', click on 'add' and complete the fields about your car(s), including your driving licence. At the bottom there are other tabs called 'Add MOT' and 'Add insurance'. Complete both of them and upload copies of your scanned documents. Please note that if you use more than one car, you can set both of them up on the system. **PLEASE NOTE THAT YOU MUST BE INSURED FOR BUSINESS MILEAGE TO BE ABLE TO MAKE A CLAIM, NOT JUST COMMUTING TO AND FROM YOUR PLACE OF WORK.**
4. When finished, click on the green 'save' button. When you do this, a white box should appear in the middle of the screen entitled 'Vehicle'. This should also show the name of your line manager in the middle. If you click on the green 'save' button, then an email will be sent to your line manager, requesting them to approve your details. **You should not start claiming any mileage or expenses until your information has been approved. You may want to let your line manager know that you have added this information and ask them to approve it so you can get started with your claim.**

Making a Mileage Claim

Once all of your information has been approved, you are ready to start claiming.

5. For a mileage claim, click on the Mileage tab. Then complete 'date' and 'purpose' fields. Please note that there are a number of options in the 'purpose' field – do please take care to select the right one, especially if the work was related to an initiative which needs to be costed outside of Ebor, such as training undertaken for another organisation, school to school support, or meetings which are for particular external initiatives. By selecting the right purpose, Finance will be able to identify it and re-charge the cost to the correct budget.

Once this is done, add a 'description' in the relevant left hand column of the table.

Please add a full description in the “description” field, so your manager can see at a glance what you are claiming for e.g. “meeting at xxxxxx school with the headteacher”, rather than just entering something generic, like “meeting”.

6. Initially you will need to then click on the box called 'Enter Journey Details'.

If you have travelled from one Ebor school to another:

7. Click on 'Group' and select the schools option. We have created a list of all of the schools in the Trust so you don't have to look up the postcode each time.
8. Click on 'Location' and select the school you started your journey from and then click the purple 'add' box to the right hand side of the drop down menu. You'll see the name of the location you just selected drops into the bottom half of the box. Then go back to the drop down list of schools and select the school you travelled to, and again click on the 'add' button. You will see that the name also appears at the bottom of the box and the number of miles travelled is shown, minus your usual home to work commute.
9. If you did a return journey, click on the purple 'return to start' box. When that journey has been entered, click on the green 'save' button and you will see the line appears in your 'current claims' page. **However, remember that in this case you will only have had a single home to office commute deducted from your claim, so you will need to manually adjust the hours you are claiming by the amount of your commute. You can do this in the box showing the total number of miles – just deduct your usual home to office mileage from that figure. The system will ask you for a reason for this and allow you to select from a dropdown menu. If your usual commute mileage should not apply, you can click into the box at the bottom of the screen entitled 'journey miles' and amend it accordingly.**
10. Continue entering all of the different journeys you wish to claim for in the same way.

If you have travelled to or from somewhere that is not an Ebor school:

11. If you didn't travel between Ebor schools, you can simply enter the postcodes of your start and end points in the postcode field on the second line down in the 'Journey details' box.

12. If you wish to memorise a certain journey so you can recall it quickly in future claims, you can click on 'memorise journey'. When you want to claim for that journey in future, instead of clicking on the box entitled 'Enter journey details' you can click on the box below, entitled 'Recall a favourite journey' and select the saved route.

General Points to Note – please read

- If you make a mistake, don't worry, you can click into the line of any claim and select 'delete'.
- If you have more than one post, please ensure you are logged into the system on the correct role before claiming the mileage, this is so it is charged to the correct cost code.
- When you are ready to submit a claim, click on the green 'submit claim' box at the top of the current claims screen. This will fire an email to your line manager. Once they have reviewed the claim, you will get an email informing you whether it has been approved or declined.
- Once approved, your claim will be exported to payroll and paid with your pay on pay day. Therefore you will need to get your claims for the previous month approved by the about the 10th of each month for them to be paid to you at the end of that month.
- You do not need to retain or submit fuel receipts, so this tab on the system can be ignored.
- If you change address, or start working from a different location, you need to let your line manager know, so that your commute mileage can be amended accordingly.

Expense claims

This is so easy it barely needs explanation! **Please note that this is only to be used for travel related expenses, such as car parking, train fares etc.**

1. Select the 'Add Expense' button
2. Complete all mandatory fields as appropriate
3. Attach a scanned copy of your receipt
4. Click 'Save' then submit it in the same way as for mileage.

Again, ensure you are logged in to the right post, if you have more than one role, so that the expenses are charged to the right cost code.

If you have questions about any of the above, please speak to a member of your office staff or a member of the HR team.