

Notes regarding making claims

An 'approved duty' may be a council meeting attended, a training course or another event that qualifies for a claim for expenses.

It is advised that you enter duties as and when they occur and then submit them all in one batch each month.

Claims must be submitted within 2 months of the period they relate to, or payment will not be made unless approved by the Chief Exec.

This guide is only covering creating and submitting a new claim.

Accessing Members allowances

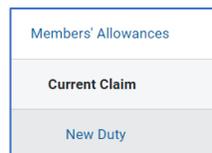
1. Access **C First** from the intranet (Edge)
2. Scroll to select **Allowances, Payslips and Forms**
3. Select **Members' Allowances** button
4. Login using your **AD username** and **Password**

Starting a new duty claim

1. Select **Current claim** from the left-hand menu

Any duties that you have already entered for the current month but not yet submitted will be displayed. These can be edited or deleted as required.

2. Select **New Duty** from the left-hand menu
3. Immediately click on the **Add new duty** button



A separate pop-up screen will open with a list of duties that you are able to select. These are based on the events that have occurred this month.

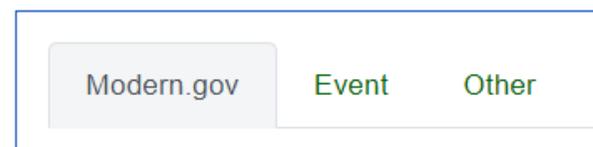
To see a list of All meetings, select the **View All Meetings** button at the bottom of this pop-up screen.

There are 3 categories of event:

Modern.gov - which is all meetings that you were expected to attend.

Events - which is other events such as training etc.

Other - which is for any additional duties that you have carried out that aren't listed.



Adding a duty from the Modern.gov and the Events tab

1. From the list of duties, select the green **Add duty** button to the right.
This duty will now move to the top of the pop-up window

Important Note: Do not add any more duties at this stage unless they are on the same day – you can return back to enter these other duties later

2. Select **Return to details** at the bottom right
3. Back in the main screen, enter **Start Date/Time**, and **End Date/Time**

Please note the start and end times **MUST** be entered in 24-hour clock format, using a colon to separate hours and minutes e.g., 14:30

4. In My journeys, use the drop down to select a pre-set journey if applicable, this will then fill in all the other fields automatically

OR

5. Enter the **Travelled from** and **Travelled to** details manually
6. **Tick** to indicate if the journey was one way or return
7. Select the appropriate **Travel mode**

Using the Members allowances system to add a new duty

8. Enter the **Total miles**
9. Enter **Fares paid** (£) – this will be any bus or rail fares. Do not include taxi fares here
10. In the **Allowances/Expenses** section, enter any taxi fares in incidental expenses, use the Carer allowance field if applicable, and enter any other relevant information in Notes
11. Once all information has been completed, select **Save** at the bottom right

The claim will now be listed at the top half of the screen.

Current Claim					
Duty Date	Details	Mileage	Amount	Carers	
07/12/23	Cabinet	30	0.00	0.00	Select Remove
Total		30	0.00	0.00	

* Non-Modern.gov Duty ** Modern.gov Duty with no attendance Record # Member Development Event † Adjusted Amount

12. If you wish to add more claims, select the **New Duty** button again on the left-hand side menu
13. Repeat until you have added all your claims – they will now be listed under current claim on the left

Members' Allowances
Current Claim
New Duty
12/10/2023 09:00
07/12/2023 09:00

Adding a duty from the Other tab

1. Select the **Add new Duty** button again
2. Select the **Other** tab in the pop-up window
3. Enter the **Start Date/Time** and **End Date/Time** for the claim
4. In the **Details** section, enter any relevant information regarding your claim
5. Select **Add**

Please enter the start date and time for the individual duty excluding travelling time

Start Date/Time: 27/11/2023 09:00

End Date/Time: 27/11/2023 17:00

Details: 'Committee meeting in town hall'

Add Return to Details

The duty will be added to the top of the pop-up screen.

6. Select **Return to Details**
7. Add in all relevant information, as we did for committee meeting events
8. Select **Save** when done

Submitting a claim

1. Select current claim on the left

The list of claims you are about to submit will be displayed on the right.

Send Claim

Once you have checked that the details above are correct you can send this claim for processing by clicking the button below.

Send claim

2. Select **Send claim**
3. Read the declaration and select **I Accept** button to accept and submit the claim

You will now be given a confirmation that your claim has been submitted and a reference number provided.

Viewing Sent Claims

1. To view a list of claims that you have already submitted but have not yet been paid for, select **Sent claims** from the left-hand menu
2. A list of all claims submitted will be displayed at the bottom of the screen

Viewing Progressed Claims

1. To view a list of claims that you have already been paid for, select **Progressed claims** from the left-hand menu
2. A list of claims paid will be displayed at the bottom of the screen