

## Step by Step Guide to Creating a Claim on Selenity Expenses

### Important information:

The self-registration process **must** be completed, and a **UK bank account** added before you can make a claim - please see the separate guidance on registration for more details.

**All claimants** should select **Global Health Fellowship Volunteer Programme** in both Venue boxes and the **Specialty** box.

No claims will be processed until **after** you have deployed and are working on the GHF Volunteer Programme. Please therefore do not submit expense claims until you have left the UK.

**ALL EXPENSES CLAIMED NEED A RECEIPT**

**SUBMIT ONE CLAIM FOR EACH CALENDAR month**

**CLAIMS SHOULD BE SUBMITTED AS SOON AS POSSIBLE IN FOLLOWING MONTH**

### Contents

Step by Step Guide to Creating a Claim on Selenity Expenses .....	1
Important information:.....	1
Logging in and entering your General Details.....	1
Adding a further expense item .....	9
Completing and submitting your claim.....	10
After your claim has been submitted .....	12
Privacy notice.....	14

### Logging in and entering your General Details

This is the link you will need (do not use search engine results as they may show a different organisation's version of the same software):

<https://heeron.sel-expenses.com>

If you experience any difficulties with the operation of the system, please try using it in a different browser before querying with the Expenses Team.

Enter the company ID of HEENON, your username and password and then click on the Logon button.

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

Once you have logged in, you will need to go to My Details/My Bank Details/Add Details to safely add the account and sort code you wish your expenses payment to be made to – **you will not be able to submit a claim until this step has been completed.**

If you have a building society roll number, add it to the Reference field.

If you have a UK bank account please ignore the Swift & IBAN boxes.



### My Details

Update your basic details such as name and address. View details of your current car and vehicle journey rate. View the steps required to approve a claim you submit. Assign delegates to manage your account.



### My Bank Accounts

Manage your personal Bank Accounts within Expenses. Add multiple Bank Accounts so that you can specify where reimbursements are paid.

#### My Bank Accounts

##### My Bank Accounts

Account Name ▲	Account Number	Account Type	Currency	Sort Code	Reference
There are currently no bank accounts defined.					

close

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

Click on New Bank Account and the following screen will appear for details to be added, the title boxes below shown with an asterisk are mandatory.

### New Bank Account

Account Name*	<input type="text" value="Ms A BCDE"/>	?	Account Number*	<input type="text" value="01234567"/>	?
Account Type*	<input type="text" value="Current"/>	?	Sort Code*	<input type="text" value="605010"/>	?
Reference	<input type="text" value="HEE Expenses"/>	?	Account Currency*	<input type="text" value="Pound Sterling"/>	?
Country*	<input type="text" value="United Kingdom"/>	?	IBAN	<input type="text"/>	?
SWIFT Code	<input type="text"/>	?			

Click on the Save button then click on the Home icon which will take you to the main menu.

This will take you to the following screen. Click on “Add New Expenses”:

The screenshot shows a user interface for a home dashboard. At the top, there is a navigation bar with a 'Home' icon and the text 'You are currently logged in as Miss Lucy Heald'. Below this, there is a 'Log Off employee account' link. The main content area is divided into several sections:

- Add New Expenses**: This section is circled in red. It contains a plus icon and the text: 'Add new entries to current claims for any expenses you have incurred. If a current claim does not exist one will be created.'
- My Claims**: Contains a document icon and the text: 'Create new claims, edit or delete existing ones. View current, submitted and previous claims. Submit finished claims into the approval process.'
- My Details**: Contains a person icon and the text: 'Update your basic details such as name and address. View details of your current car and vehicle journey rate. View the steps required to approve a claim you submit. Assign delegates to manage your account.'
- Help & Support**: Contains an information icon and the text: 'Help & Support is an online service for education, guidance and support that enables you to find the best answers for your Expenses questions.'
- View My Company Policy**: Contains a document icon and the text: 'View a copy of your travel and expense company policy.'
- View My Claimable Items**: Contains an information icon and the text: 'Examine the expense items you are allowed to claim and view any associated limits.'
- Reports**: Contains a bar chart icon and the text: 'Create new reports, edit, delete or view existing ones. Export data to Excel, CSV, flat file or create pivot tables.'
- Expenses Mobile App**: Contains a smartphone icon and the text: 'Download the new app that allows you to manage your expenses without the need to power up your computer.'
- Log Out**: Contains a power icon and the text: 'Log out of Expenses and close this window.'

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

The following screen appears.

Enter the date of your claim, this **must** be the date of the expense shown on the receipt.

The screenshot shows the 'Add Expense' form. On the left is a sidebar with 'Page Options' (Clear General Details) and 'My Expense Items' (a list of categories with checkboxes). The main form is divided into 'General Details' and 'Specific Details'. In the 'General Details' section, the 'Date' field contains '25/04/2022' and is circled in red. Other fields include 'Country' (United Kingdom), 'Currency' (Pound Sterling), 'Claim' (HRobinson221), 'Venue - Claimant Type' ([None]), and 'Specialty' ([None]). There is a search box for 'Venue/Claimant Type' and an 'Other Details' text area. The 'Specific Details' section has 'Expense Category' (Please select an option) and 'Expense Item' (Please select an option). 'save' and 'cancel' buttons are at the bottom.

Go to the Country box and click on the dropdown arrow and select the country.

This screenshot is identical to the previous one, but the 'Country' dropdown menu is open, showing 'Malawi' selected and circled in red. The rest of the form, including the sidebar and other fields, remains the same.

Click on the down arrow next to the currency box and select the currency for the expense item you are claiming.

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

**Page Options**

[Clear General Details](#)

**My Expense Items**

Select an item below to add it to your expense sheet:

- Books/Materials
- Bus Fare / Coach
- CBT
- DBS
- Flight (Within UK On...
- Formal Studies Acti...
- GHFV Stipend
- Hotel Accommodati...
- Hotel Accommodati...
- Mileage
- Mileage (detour only)
- NSHCS Equipment
- OSCE
- Panel Member - Eve...
- Panel Member - Inci...
- Panel Member - Lun...

### Add Expense

**General Details**

Date:  ? Claim:  ?

Country:  ?

Currency:  ? Exchange Rate:  ?

Venue - Claimant Type:  \* Venue/Claimant Type:

Specialty:

Other Details:  ?

**Specific Details**

Expense Category:  Expense Item:

Click the down arrow in the Venue – Claimant Type panel on the left and select from the drop-down list **Global Health Fellowship Volunteer Programme**. **SEE THE GREEN CIRCLE IN THE SCREEN SHOT BELOW. N.B. YOU MUST DO THIS FIRST**. Then click in the 2<sup>nd</sup> Venue-Claimant Type and the same information will appear, click in this text.

**Page Options**

[Clear General Details](#)

**My Expense Items**

Select an item below to add it to your expense sheet:

- Books/Materials
- Bus Fare / Coach
- CBT
- DBS
- Flight (Within UK On...
- Formal Studies Acti...
- GHFV Stipend
- Hotel Accommodati...
- Hotel Accommodati...
- Mileage
- Mileage (detour only)
- NSHCS Equipment
- OSCE
- Panel Member - Eve...
- Panel Member - Inci...
- Panel Member - Lun...

### Add Expense

**General Details**

Date:  ? Claim:  ?

Country:  ?

Currency:  ?

Venue - Claimant Type:  ? Venue/Claimant Type:  ?

Specialty:

Other Details:  ?

**Specific Details**

Expense Category:  Expense Item:

Click on the Specialty drop down arrow and select **Global Health Fellowship Volunteer Programme**

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

**Page Options**

[Clear General Details](#)

**My Expense Items**

Select an item below to add it to your expense sheet:

- Books/Materials
- Bus Fare / Coach
- CBT
- DBS
- Flight (Within UK On...
- Formal Studies Acti...
- GHFV Stipend
- Hotel Accommodati...
- Hotel Accommodati...
- Mileage
- Mileage (detour only)
- NSHCS Equipment
- OSCE
- Panel Member - Eve...
- Panel Member - Inci...
- Panel Member - Lun...

### Add Expense

**General Details**

Date:  ? Claim:  ?

Country:  ?

Currency:  ? Exchange Rate:  ?

Venue - Claimant Type:  Venue/Claimant Type:

Specialty:  ?

Other Details:  ?

**Specific Details**

Expense Category:  Expense Item:

Add the details of the expense in the "Other details" box. E.g. WIFI for the month of XXX

**Page Options**

[Clear General Details](#)

**My Expense Items**

Select an item below to add it to your expense sheet:

- Bus Fare / Coach
- Flight (Within UK Onl...
- Hotel Accommodati..
- Hotel Accommodati..
- Interviewee - Accom..
- Mileage
- Mileage (detour only)
- Panel Member - Eve..
- Panel Member - Inci..
- Panel Member - Lun..
- Panel Member - Mea..
- Parking
- Taxi
- Train Ticket
- Tube / Underground.

### Add Expense

**General Details**

Date:  ?

Country:  ?

Currency:  ?

Venue - Claimant Type:  Venue/Claimant Type:

Speciality (if applicable):

Other Details:  ?

**Specific Details**

Expense Category:  Expense Item:

Click on down arrow at the side of the Expense Category box and select **GHFV Stipend** then go to the down arrow at the side of the Expense Item and select **GHFV Stipend**

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

**Page Options**

[Clear General Details](#)

**My Expense Items**

Select an item below to add it to your expense sheet:

- Books/Materials
- Bus Fare / Coach
- CBT
- DBS
- Flight (Within UK On...
- Formal Studies Acti...
- GHFV Stipend
- Hotel Accommodati...
- Hotel Accommodati...
- Mileage
- Mileage (detour only)
- NSHCS Equipment
- OSCE
- Panel Member - Eve...
- Panel Member - Incli...
- Panel Member - Lun...

### Add Expense

**General Details**

Date:  ? Claim:  ?

Country:  ?

Currency:  ? Exchange Rate:  ?

Venue - Claimant Type:  Venue/Claimant Type:

Specialty:

Other Details:

---

**Specific Details**

Expense Category:  Expense Item:

Do you have a receipt:  Yes  No ?

Total (Gross):

All expense items claimed require a receipt, click in the circle to the left of the Yes box. Enter the total from the receipt **REMEMBER to click on the Save button.**

**Page Options**

[Clear General Details](#)

**My Expense Items**

Select an item below to add it to your expense sheet:

- Books/Materials
- Bus Fare / Coach
- CBT
- DBS
- Flight (Within UK On...
- Formal Studies Acti...
- GHFV Stipend
- Hotel Accommodati...
- Hotel Accommodati...
- Mileage
- Mileage (detour only)
- NSHCS Equipment
- OSCE
- Panel Member - Eve...
- Panel Member - Incli...
- Panel Member - Lun...

### Add Expense

**General Details**

Date:  ? Claim:  ?

Country:  ?

Currency:  ? Exchange Rate:  ?

Venue - Claimant Type:  Venue/Claimant Type:

Specialty:

Other Details:

---

**Specific Details**

Expense Category:  Expense Item:

Do you have a receipt:  Yes  No ?

Total (Gross):  ?

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

The following screen appears:

The expense is complete and the screen below is created. The system has created the claim name which is the unique claim reference.

Home / My Claims / Current Claims

Claim: HRobinson221

### Claim Details

General Information

Claim Name: HRobinson221      Claim Total: £48.19

Claim Description: test

Number of Items: 1      Amount Payable: £48.19

Expense Items

Number of Miles	Date of Expense	Expense Item	Reason	Other Details	Total	Amount Payable	Department	Cost Code	Project Code
	26/04/2022	GHFV Stipend			£48.19	£48.19	Global Health Fellowship Volunteer Programme	Global Health Fellowship Volunteer Programme	Global Health Fellowship Volunteer Programme
					£48.19	£48.19			

You now need to add the receipt, click on the yellow scroll icon

The following screen appears. Hover over in the grey panel (to the left) and the scroll icon appears as shown.

Page Options

### Receipt Management

Manage Receipts

Your claim and its receipt images are below: [Show help](#)

HRobinson221      1 item      [Not submitted]      £48.19

GHFV Stipend      127-000056      26/04/2022      £48.19

save    cancel

Click on this icon and this opens a window showing the drives/folders device.

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

**Receipt Management**

Manage Receipts

Your claim and its receipt images are below. [Show help.](#)

**HRobinson148**      **1 item**      **[Not submitted]**      **£145.00**

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Claim Header

**Hotel Accommodation (London)**      127-000003      25/11/2018      **£145.00**



**save**   **cancel**

Select the area where you have saved the receipt image and click on the receipt to upload it to your claim.

Click on **Save**. The Scroll icon now has a magnifying glass under it and the receipt can now be viewed.

Claim: HRobinson221

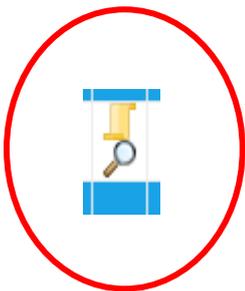
**Claim Details**

General Information

Claim Name	HRobinson221	Claim Total	£48.19
Claim Description	test		
Number of Items	1	Amount Payable	£48.19

Expense Items

	Number of Miles	Date of Expense	Expense Item	Reason	Other Details	Total	Amount Payable	Department	Cost Code	Project Code
		26/04/2022	GHFV Stipend			£48.19	£48.19	Global Health Fellowship Volunteer Programme	Global Health Fellowship Volunteer Programme	Global Health Fellowship Volunteer Programme
	0					£48.19	£48.19			



### Adding a further expense item

To add another expense item to the claim, go to the Page Options box and click on “New Expense” from the list.

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

Claim: HRobinson221  
**Claim Details**

**General Information**

Claim Name	HRobinson221	Claim Total	£48.19
Claim Description	test		
Number of Items	1	Amount Payable	£48.19

**Expense Items**

Number of Miles	Date of Expense	Expense Item	Reason	Other Details	Total	Amount Payable	Department	Cost Code	Project Code
	26/04/2022	GHFV Stipend			£48.19	£48.19	Global Health Fellowship Volunteer Programme	Global Health Fellowship Volunteer Programme	Global Health Fellowship Volunteer Programme
0					£48.19	£48.19			

This opens up the following screen as you can see the country and currency are already populated.

**IMPORTANT: if you want to claim for another expense item in a different currency then the country and currency boxes need to be changed.**

**Add Expense**

**General Details**

Date:	26/04/2022	Claim:	HRobinson221
Country:	Malawi	Exchange Rate:	1037.615905
Currency:	Malawi Kwacha	Venue/Claimant Type:	Search
Venue - Claimant Type:	[None]		
Specialty:	[None]		
Other Details:			

**Specific Details**

Expense Category:	Please select an option	Expense Item:	
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**save** **cancel**

Complete as many expense items required to complete your monthly expenses claim by following the above steps. Then submit it – see next page.

## Completing and submitting your claim

Your claim will not be checked, approved & paid until you submit it.

Click on **Submit Claim** when your expenses claim is complete:

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

Page Options  
[New Expense](#)  
[Claim List](#)  
[Change View](#)  
[Print](#)  
[Submit Claim](#)

Claim: HRobinson221  
**Claim Details**

**General Information**

Claim Name	HRobinson221	Claim Total	£55.42
Claim Description	test		
Number of Items	2	Amount Payable	£55.42

**Expense Items**

	Number of Miles	Date of Expense	Expense Item	Reason	Other Details	Total	Amount Payable	Department	Cost Code	Project Code	Reason	Reason for additional mileage
		26/04/2022	GHFV Stipend			£48.19	£48.19	Global Health Fellowship Volunteer Programme	Global Health Fellowship Volunteer Programme	Global Health Fellowship Volunteer Programme		
		26/04/2022	GHFV Stipend	WIFI		£7.23	£7.23	Global Health Fellowship Volunteer Programme	Global Health Fellowship Volunteer Programme	Global Health Fellowship Volunteer Programme		
	0					£55.42	£55.42					

The following message then appears and the claim number and description is shown:

Receipts

Thank you for submitting your expenses claim. You can track the status of your claim by logging in and from the home page and click on 'My claims'.

You should keep your original receipts for three complete tax years after the end of the tax year to which they relate in the event that any queries are raised by HM Revenue and Customs over the claims made.

If you have a query please e-mail nonstaff@hee.nhs.uk

Claim Total	£190.00
Amount Payable	£190.00

Number of Miles	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	Amount
	25/11/2018	Hotel Accommodation (London)			£145.00	£0.00	£145.00	

**Submit Claim**

**Claim Summary**

Claim name\*

Description

Click on the **Save** button and the Declaration window appears, please read and then click on the 'I Accept' button.

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

### After your claim has been submitted

Once submitted, your claim will move from the current claim page to your submitted claims page (Home/My Claims):

Clicking into the submitted claims page will bring up a list of claims still waiting for payment and currently with the HEE checkers & approvers. You can click into any of these to view the claim history for information about what is happening with your claim:

Submitted Claims

Filter

Claim Number	Claim Name	Claim Description	Number of Items	Claim Total	Date Submitted
56	<a href="#">JBedford56</a>	Expense Claim 56:28/11/2018 - 28/11/2018	2	£18.50	10/12/2018
51	<a href="#">JBedford51</a>	Expense Claim 51:02/12/2018 - 02/12/2018	1	£88.00	10/12/2018
52	<a href="#">JBedford52</a>	Expense Claim 52:02/12/2018 - 02/12/2018	1	£12.00	03/12/2018
53	<a href="#">JBedford53</a>	Expense Claim 53:03/12/2018 - 03/12/2018	2	£85.38	03/12/2018

The claims history screen can be seen above the list of your expense items:

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

Claim: HRobinson148

## Claim Details

## General Information

Claim Name	HRobinson148	Claim Total	£190.00
Claim Description	Expense Claim 14825/11/2018 - 25/11/2018		
Number of Items	2	Amount Payable	£190.00
Current Stage	1 of 55	Date Submitted	26 November 2018
Current Approver	Cost Code Owner(s)		

## Claim History

Date Stamp	Entered By	Comment	Stage	Reference Number
26/11/2018 11:04	Ms Helen Robinson	Claim submitted.	0	
26/11/2018 11:04	Ms Helen Robinson	The claim has been sent to the next stage and is awaiting claim item approval by the cost code owner(s).	0	

## Expense Items

Number of Miles	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	Amount Payable	Cost Code Description	Project Code
	25/11/2018	Hotel Accommodation (London)			£145.00	£0.00	£145.00	£145.00	London - Paediatric Cardiology	Cardiology
	25/11/2018	Train Ticket			£45.00	£0.00	£45.00	£45.00	London - Paediatric Cardiology	Cardiology
0					£190.00	£0.00	£190.00	£190.00		

If your checkers and approvers do not have any questions or issues with your claim, you will receive an email once the claim has been approved for payment in the system. We make a number of BACS payments a week, so you should receive payment into your account in no more than 7 working days after the notification email. Once a claim has been paid it will appear in your 'Previous Claims' page for future reference.

### Important

**If an expense item is disputed and returned, you will receive an e-mail notification explaining what action you need to take. If you have not corrected or deleted an item before 28 days from the date the claim was rejected, the item will be deleted from your claim. This will ensure the remainder of your claim can progress to payment. If the whole of your claim is incorrect, it will be unsubmitted and returned to your 'Current Claims' page – again you will receive an email and will need to amend and resubmit if applicable.**

If you have returned items, those items will be in red on your claim. You will need to edit the item and re-save it in order to return it to the person checking it. Once you've done this it will no longer be red. Please note that if you are only attaching a receipt using the Scroll icon, you will still need to edit and re-save to move the claim back:

## Expense Items

Number of Miles	Date of Expense	Expense Item	Reason	Other Details	Total	Amount Payable	Department	Cost Code	Project Code	Reason	Reason for additional mileage	Number of Nights	Fl
	30/01/2019	Hotel Accommodation (outside London)		national selection for neurosurgery panel member	£179.10	£179.10	Yorkshire and Humber - Trainee R'ment - Panel Mem	Yorkshire and Humber - Trainee Recruit - Panel Mem	Neurosurgery			2	
	417.90	30/01/2019	Mileage	national selection for neurosurgery panel member	£188.06	£188.06	Yorkshire and Humber - Trainee R'ment - Panel Mem	Yorkshire and Humber - Trainee Recruit - Panel Mem	Neurosurgery			0	
	417.90				£367.16	£367.16							

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

## Privacy notice

*HEE processes your personal data for the purpose of the reimbursement of your expense claims. HEE relies on the legal basis of public task / interest to process your personal data electronically for this purpose. Your personal data may be processed by the third party supplier of the expenses system, Selenity, however, it will only be accessed as per the terms of the contract i.e. for the purposes of hosting, back-up, implementation and support.*

*The HEE Privacy Notice can be accessed by clicking on the link below:*

<https://www.hee.nhs.uk/about/privacy-notice>

*Remember to submit your claim within 28 days of the last expense item claimed for the month*

Document Control	
<b>Making a claim – Guidance notes for Claimants</b>	
Version: 1	Author: H Robinson, Finance Officer, HEE
Effective date: 20/11/2020	Last changed: 23/11/2020

*Remember to submit your claim within 28 days of the last expense item claimed for the month*