

Create

- Setting up your ME Account—user guide on Trust Intranet, follow instructions
- New Claim - click the box on the left hand side. Please make sure you submit your claims by 5th of every month .
- Change the approving unit (3rd box down) in the drop down list to 'Medical Education Services' or 'Medical Staffing' for **RELOCATION** and press the 'Create' button at the bottom right hand side..
- Save the new authorising unit before proceeding with the rest of the claim.

Choice

- Click the relevant expense claim heading for which you are requesting reimbursement.
- Click on the 'New Expense' button to start entering details of your claim.
- NOTE: Courses can be claimed for under the 'Supplementary' option.

Mileage claims

- Text Title (Orange TEXT, right at the top of the page) - enter Description / Notes of claim - i.e. 'travel for course' or 'travel for teaching'.
- Expense Type - Training miles (Trust business) only choose this for mandatory training travel, i.e. Inductions, Regional Training Days.
- All other courses/teaching events are Training Miles (Voluntary), complete all relevant boxes on this page and press either 'save' button to finish or 'save and new' button to enter further claims- you can put numerous lines on one claim.
- If at this point you receive yellow 'warnings' - you can still press the 'continue' button down on the right hand side to progress the claim.
- If you receive red 'warnings' - violations', you will not be able to submit the claim without dealing with the violation - usually if car tax and MOT info is out of date. Contact Med Ed admin email - medwayft.study.leave@nhs.net
- Once all of your claim lines are entered and saved - press the 'Save' button on the bottom right hand side.

Travel / Relocation claims

- Select 'New Expense' box on the left hand side.
- Text Title (Orange TEXT right at the top of the page) - enter Description / Notes of claiming for - i.e. 'Travel for course' or 'travel for teaching'.
- Select 'Expense Type' - for Relocation, use 'Excess Travel' - for Train tickets, select 'Rail Fare'. There are other options for parking etc. select as required.
- Enter all other relevant details on this page and upload receipts as required as a '**pic.jpeg doc**'.
- **RELOCATION Only** - Choose '**Medical Staffing**' as the authorising unit—Add agreed daily amount: you are required to upload an image of your approval letter obtained from Medical staffing. Enter the same image several times if making numerous daily claims.
- See the above points in 'Mileage claims' if you incur any issues prior to submitting the claim.

Subsistence

- Follow the same procedure as in 'Travel/ Relocation claims' remembering to check 'Save'.

Supplementary

- **COURSE FEE REIMBURSEMENT**—Follow the same procedure as in 'Travel/ Relocation claims' above, entering the name of the course in the Text Title and also remembering to check 'Save'.

Submit

- Once ready to submit your complete claim with either a single entry or **numerous** entries:
- Select the 'Submit' button located at the bottom right hand side of the page.
- You can UNSUBMIT a claim by checking the 'Back to claims' button. This takes you back to the front page where you are required to check 'Submitted Claims'; now press the orange back arrow, this will allow you to edit/change or delete. You can also print a copy of your claim in this option.
- Once the claim has been authorised and sent for payment, there can be no further changes made.