

Step by Step Guide to Creating a Claim on Selenity Expenses

Important information:

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

PANEL MEMBERS (Excluding GP's): Ideally you should claim from your employer and ask them to invoice Health Education England for reimbursement. Selenity should only be used if this is not possible. If your employer has refused to reimburse you directly, please attach evidence of this to your claim.

PANEL MEMBER (GP's): Use Selenity to claim travel and subsistence expenses in relation to recruitment interviews. *These must not be claimed using the paper claim forms used in previous years, as these will not be processed.* However, if you wish to claim any other reimbursements of expenses (for example back fill / resource fees) and are unsure of the method, please contact your local deanery.

All claimants should select the venue where their interview/panel is held, not the one where they live or work (unless they are the same), WITH THE EXCEPTION of:

- Applicants attending venues in Northern Ireland, Scotland & Wales should claim from that devolved nation
- Panel members from England attending Scotland, Northern Ireland or Wales events should claim from their home region in England

ALL EXPENSES CLAIMED NEED A RECEIPT EXCEPT INCIDENTAL AND MILEAGE/DETOUR MILEAGE

SUBMIT ONE CLAIM FOR EACH VENUE ATTENDED

CLAIMS SHOULD NOT BE SUBMITTED BEFORE THE EVENT TAKES PLACE

The examples of expense items shown in this guide are for a Hotel and Train Ticket, but the method is the same for all items.

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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://heenon.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.

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.

For non-UK payments, ensure the Swift and IBAN fields are completed.

Remember to submit your claim within 28 days of the event



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

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.

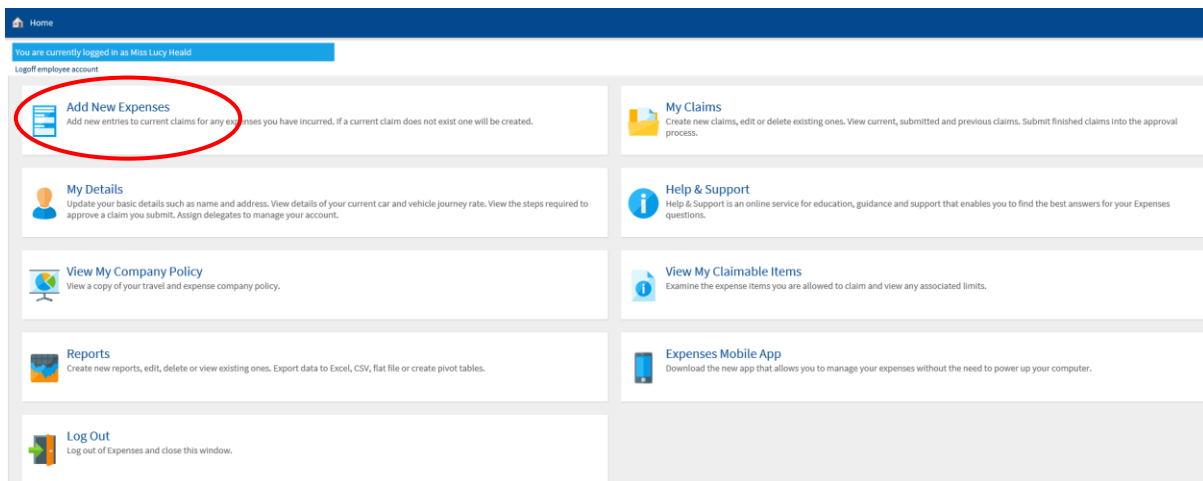
New Bank Account

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"/>	?			

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

Remember to submit your claim within 28 days of the event

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



The following screen appears.

Enter the date of your claim, this **must** be the date of the event you are attending.

The screenshot shows the 'Add Expense' form. On the left is a sidebar with 'Page Options' including 'Clear General Details' and 'My Expense Items'. The 'My Expense Items' section lists various expense types with checkboxes: Bus Fare / Coach, Flight (Within UK Ont), Hotel Accommodati., Interviewee - Accom., Mileage, Mileage (detour only), Panel Member - Eve., Panel Member - Inci., Panel Member - Lun., Panel Member - Mea., Parking, Taxi, Train Ticket, and Tube / Underground. The main form area is titled 'Add Expense' and has two sections: 'General Details' and 'Specific Details'. In the 'General Details' section, the 'Date' field is circled in red and contains '25/11/2018'. Other fields include 'Country' (United Kingdom), 'Currency' (Pound Sterling), 'Venue - Claimant Type' (None), 'Speciality (if applicable)' (None), and 'Other Details'. The 'Specific Details' section has 'Expense Category' (Please select an option) and 'Expense Item' (Please select an option). There are 'save' and 'cancel' buttons at the bottom.

Remember to submit your claim within 28 days of the event

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

For National UK Foundation Programme Office claimants only, there are 2 options to choose from:

- National Foundation Prog Office – Applicant
- National Foundation Prog Office – Panel Member

Although a large list, it will appear in alphabetical order and be easy to sort through.

ALL CLAIMANTS SHOULD SELECT THE VENUE WHERE THEIR INTERVIEW/PANEL IS HELD, NOT THE ONE WHERE THEY LIVE OR WORK (UNLESS THEY ARE THE SAME).

REMEMBER – A SEPARATE CLAIM FOR EACH EVENT VENUE ATTENDED

Add Expense

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.

General Details

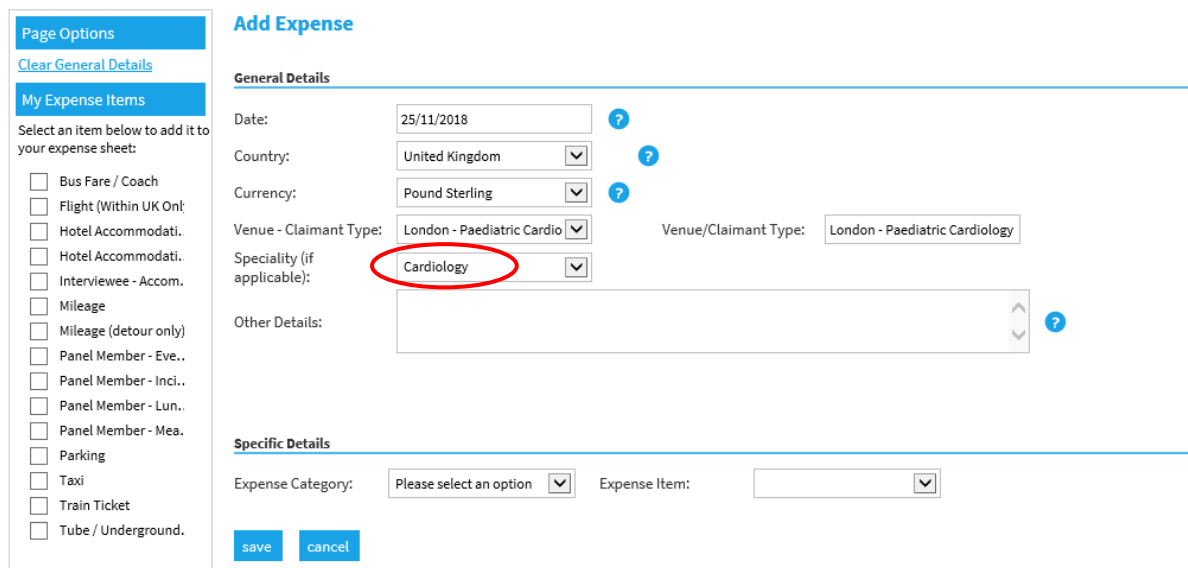
Date: 25/11/2018 ?
 Country: United Kingdom ?
 Currency: Pound Sterling ?
Venue - Claimant Type: London - Paediatric Cardio
 Speciality (if applicable): [None]
 Other Details:
 Venue/Claimant Type: London - Paediatric Cardiol X

Specific Details

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

Remember to submit your claim within 28 days of the event

Click on the Speciality drop down arrow and select from the alphabetical list:



Add Expense

General Details

Date: 25/11/2018 ?

Country: United Kingdom ?

Currency: Pound Sterling ?

Venue - Claimant Type: London - Paediatric Cardio ? Venue/Claimant Type: London - Paediatric Cardiology

Speciality (if applicable): **Cardiology** ?

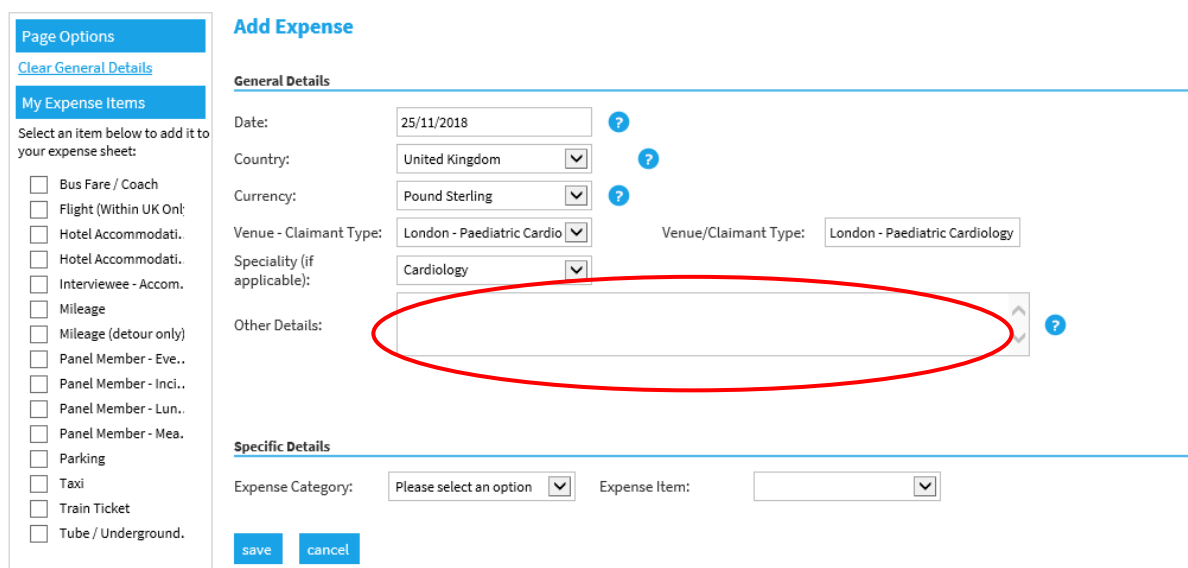
Other Details: ?

Specific Details

Expense Category: Please select an option ? Expense Item: ?

[save](#) [cancel](#)

Provide any additional information which may be helpful for the claim approver in the “Other Details” box. This will also be of help to you if making several claims:



Add Expense

General Details

Date: 25/11/2018 ?

Country: United Kingdom ?

Currency: Pound Sterling ?

Venue - Claimant Type: London - Paediatric Cardio ? Venue/Claimant Type: London - Paediatric Cardiology

Speciality (if applicable): Cardiology ?

Other Details: ?

Specific Details

Expense Category: Please select an option ? Expense Item: ?

[save](#) [cancel](#)

You can add expense items by selecting different check boxes on the left – in this case each selection will appear in the Specific Details section, ready to be filled in. You can also add them as detailed in the following pages.

The examples shown are for Hotel and Train Ticket, but the overall principles are the same for all items (receipts not needed for mileage, mileage detour and incidental expenses).

Remember to submit your claim within 28 days of the event

Entering your expense item & receipt (Hotel)

Enter the first expense from the drop down list in the Expenses Category.

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 - Incl..
☐ Panel Member - Lun..
☐ Panel Member - Mea..
☐ Parking
☐ Taxi
☐ Train Ticket
☐ Tube / Underground.

Add Expense

General Details

Date: 25/11/2018
Country: United Kingdom
Currency: Pound Sterling
Venue - Claimant Type: London - Paediatric Cardio
Speciality (if applicable): Cardiology
Venue/Claimant Type: London - Paediatric Cardiology
Other Details:

Specific Details

Expense Category: Accommodation
Expense Item: Please select an option

save cancel

Go to the next box to the right and click on the down arrow, this displays the types of items which can be claimed in this category.

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 - Incl..
☐ Panel Member - Lun..
☐ Panel Member - Mea..
☐ Parking
☐ Taxi
☐ Train Ticket
☐ Tube / Underground.

Add Expense

General Details

Date: 25/11/2018
Country: United Kingdom
Currency: Pound Sterling
Venue - Claimant Type: London - Paediatric Cardio
Speciality (if applicable): Cardiology
Venue/Claimant Type: London - Paediatric Cardiology
Other Details:

Specific Details

Expense Category: Accommodation
Expense Item: Hotel Accommodation (Lr)

Receipt must be uploaded

Number of Nights:
Do you have a receipt: Yes No
Total (Gross):

save cancel

Remember to submit your claim within 28 days of the event

All expenses claimed require a receipt (except incidental, mileage and detour mileage), click in the circle to the left of the Yes box. Enter the number of nights stay and the total from the receipt (you can add in a separate charge for breakfast if this wasn't included in your room rate, as long as you have receipts and the total is within the £120/£150 limit):

Add Expense

General Details

Date: 25/11/2018
 Country: United Kingdom
 Currency: Pound Sterling
 Venue - Claimant Type: London - Paediatric Cardio
 Venue/Claimant Type: London - Paediatric Cardiology
 Other Details:

Specific Details

Expense Category: Accommodation
 Expense Item: Hotel Accommodation (L)

Receipt must be uploaded

Number of Nights: 1
 Do you have a receipt: ☒ Yes ☐ No
 Total (Gross): 145.00

save cancel

Click on Save.

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

Claim Details

Claim: HRobinson148

General Information

Claim Name: HRobinson148
 Claim Total: £345.00
 Claim Description:
 Number of Items: 1
 Amount Payable: £345.00

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)			£345.00	£0.00	£345.00	£345.00	London - Paediatric Cardiology	Cardiology
	0					£345.00	£0.00	£345.00	£345.00		

Add the accommodation receipt, click on the scroll icon.

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

Remember to submit your claim within 28 days of the event

Page Options **Receipt Management**


Manage Receipts

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


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

Claim Header

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



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

Page Options **Receipt Management**

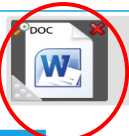
Manage Receipts

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

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

Claim Header

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


Page Options **Claim: HRobinson148**

Claim Details

General Information

Claim Name	HRobinson148	Claim Total	£145.00
Claim Description			
Number of Items	1	Amount Payable	£145.00

Expense Items

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



Remember to submit your claim within 28 days of the event

Adding a further expense item (Train Ticket)

To add another expense, click on “New Expense” from the list. This screen opens.

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

Claim: HRobinson148
Claim Details

General Information

Claim Name	HRobinson148	Claim Total	£145.00
Claim Description			
Number of Items	1	Amount Payable	£145.00

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
0					£145.00	£0.00	£145.00	£145.00		

Select the category from the drop-down arrow and select the item from the drop-down arrow in the second panel.

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: 25/11/2018
 Country: United Kingdom
 Currency: Pound Sterling
 Venue - Claimant Type: London - Paediatric Cardio
 Venue/Claimant Type: London - Paediatric Cardiology
 Speciality (if applicable): Cardiology
 Other Details:

Specific Details

Expense Category: Travel Expense Item: Train Ticket

Travel should be standard class and receipt uploaded. If a first class ticket can be purchased at a cheaper rate than standard class, evidence of this should be attached to the expense claim contactless payment.

Do you have a receipt: ☐ Yes ☒ No
 Total (Gross):

[save](#) [cancel](#)

Remember to submit your claim within 28 days of the event

Click in the circle to the left of the Yes box. Then enter the value of the train ticket.

Add Expense

General Details

Date: 25/11/2018 ?

Country: United Kingdom ?

Currency: Pound Sterling ?

Venue - Claimant Type: London - Paediatric Cardio ? Venue/Claimant Type: London - Paediatric Cardiology

Speciality (if applicable): Cardiology ?

Other Details: ?

Specific Details

Expense Category: Travel Expense Item: Train Ticket

Travel should be standard class and receipt uploaded. If a first class ticket can be purchased at a cheaper rate than standard class, evidence of this should be attached to the expense claim. I contactless payment.

Do you have a receipt: ☒ Yes ☐ No ?

Total (Gross): 45.00 ?

[save](#) [cancel](#)

Save the details of the expense.

The claim now shows two expense items as shown below:




Claim: HRobinson148


Claim Details

General Information

Claim Name	HRobinson148	Claim Total	£190.00
Claim Description			
Number of Items	2	Amount Payable	£190.00

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		

The train receipt now needs to be attached. Click on the  symbol in the Train Ticket row, it will appear in the grey area, where the red circle is shown below.

Remember to submit your claim within 28 days of the event

Page Options

Receipt Management
Manage Receipts

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

HRobinson148

2 items

[Not submitted]

£190.00

Claim Header

Hotel Accommodation (London)

127-000003

25/11/2018

£145.00

Train Ticket

127-000004

25/11/2018

£45.00

save

cancel

This will open a window showing your drives/folders on your device. Select your saved receipt. The receipt is now uploaded (in this example a word document).

Click on **Save**

You are currently logged in as Miss Lucy Heald
 Logoff employee account
 Claim: LHeald2
 Claim Details

General Information											
Claim Name	LHeald2	Claim Total	£210.00								
Claim Description	2	Amount Payable	£210.00								
Expense Items											
	Number of Miles	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	Amount Payable	Cost Code Description	Project Code
		22/11/2018	Hotel Accommodation (London)	Panel Member at interview		£145.00	£0.00	£145.00	£145.00	London - Paediatric Cardiology	Cardiology
		22/11/2018	Train Ticket	Panel Member at interview		£65.00	£0.00	£65.00	£65.00	London - Paediatric Cardiology	Cardiology
	0					£210.00	£0.00	£210.00	£210.00		

Page Options

Receipt Management
Manage Receipts

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

HRobinson148

2 items

[Not submitted]

£190.00

Claim Header

Hotel Accommodation (London)

127-000003

25/11/2018

£145.00

Train Ticket

127-000004

25/11/2018

£45.00

save

cancel

Remember to submit your claim within 28 days of the event

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:

The screenshot shows the 'Claim Details' page for 'Claim: HRobinson148'. On the left, a 'Page Options' menu has 'Submit Claim' circled in red. The main content area shows 'General Information' with 'Claim Name: HRobinson148' and 'Claim Total: £145.00'. Below this is the 'Expense Items' table:

Number of Miles	Date of Expense	Expense Item	Reason	Other Details	NET
0	25/11/2018	Hotel Accommodation (London)			£145.00

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

The screenshot shows a 'Receipts' message box on the left and a 'Submit Claim' dialog box on the right. The message box says: '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'. The 'Submit Claim' dialog box shows the 'Claim Summary' with 'Claim name*' as 'HRobinson148' and 'Description' as 'Expense Claim 148:25/11/2018 - 25/11/2018'. The 'save' button is circled in red.

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

The screenshot shows the 'Submit Claim' dialog box with the 'Declaration' window open. The declaration text reads: 'I declare that the expenses claimed hereunder were necessarily incurred by me in accordance with HEE's relevant policy. I confirm I will retain the 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.' The 'I accept' button is highlighted with a red arrow.

Remember to submit your claim within 28 days of the event

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):

The screenshot shows a dashboard with three main sections: 'Current Claims (2)' with a description 'Claims that have yet to be submitted into the approval process. Add, edit or delete expense items and claims. Submit a claim for approval.', 'Submitted Claims (54)' with a description 'Claims that are currently being approved. View the status of these claims or amend any returned items.', and 'Previous Claims (0)' with a description 'Historical claims that have been approved.'.

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

1 2 3 filter

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

Claim: HRobinson148
Claim Details

General Information

Claim Name	HRobinson148	Claim Total	£190.00
Claim Description	Expense Claim 148:25/11/2018 - 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

	Item	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	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 be paid. 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 this correctly it will no

Remember to submit your claim within 28 days of the event

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 event

Document Control	
Making a claim – Guidance notes for Claimants	
Version: 1	Author: H Robinson, Finance Assistant, HEE
Effective date: 01/01/2019	Last changed: 11/02/2019

Remember to submit your claim within 28 days of the event