EQA 10
ONLINE EXPENSES

June 2019

EQA 10: ONLINE EXPENSES
OVERVIEW

This section of the guide will your show how to manage your expense claims on Walled Garden. Here is a detail of what you will find in the following pages.

1 – SUBMITTING A CLAIM
How to submit expenses for the Quality teams to process.

2 – VIEWING OUTSTANDING CLAIMS
How to view a list of submitted expenses that have not yet been processed by the Quality Teams.

3 – AMENDING AND RESUBMITTING A CLAIM
How to amend and resubmit, or delete a claim before it has been processed by the Quality Teams.

4 – VIEWING PROCESSED CLAIMS
How to view a list of expenses that have been processed by the Quality Teams, and whether they have been approved or rejected.

City&
Guilds

① Quality

Home | Catalogue/Shop | **Quality**

Quality System | Online Forms | Candidates/Results | QMS CGLI

②

Search

Define your search by using the criteria below. The fields may change depending upon the selections made.

③

Show me: Submit Expenses ▼

For Awarding org: City & Guilds ▼

④

For period * ◉ today ▼

Or From * ○ [   ] To [   ]

⑤

Search

①	Select **Quality**
②	Select **Quality System**
③	Select **Submit Expenses** from the 'Show me' dropdown menu
④	Select **Today** from the 'For period' dropdown menu.
⑤	Click **Search**

Quality System

Welcome

Here you will be able to:

- View your allocated Centres
- View and manage all activities allocated to you
- View and submit your fees and expenses

Offline Forms

Offline forms allow you to complete CAR,CAPv and QAPv forms on your hard drive without an internet co
You will need to install Silverlight (which is available for free on the internet), as well as a bespoke City &
application which can be found **here**.You will only have to install the software once. Please refer to the use
for further information.

City& Guilds

Welcome Gillian Hanson

City& Guilds   Walled Garden

Home Catalogue/Shop **Quality**

Quality System | Online Forms | Candidates/Results | QMS CGLI

Search

Define your search by using the criteria below. The fields may change depending upon the selections made.

Show me: Submit Expenses ▼

For Awarding org   City & Guilds ▼

For period * ⦿ today ▼   **②**

Or From * ○ [____] To [____]

[Search]

For period * ⦿ today ▼
   today
   since yesterday
   last week
   last month
   last year
Or From * ○

① This page will open on the right hand side.

Submit Expenses

Consultant/EV	Consultant/EV Name
200949	John Smith

Expenses Totals

Expenses Details

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	
☐	ACCOMODATION ▼		15.08.2014		
☐	ACCOMODATION ▼		15.08.2014		
☐	ACCOMODATION ▼		15.08.2014		
☐	ACCOMODATION ▼		5.08.2014		

② If you select a different time period, the screen on the right will populate with any expenses you have previously entered, but have not yet been approved by the Quality Team.

'Expense' field will be pre-populated as shown. You will then be able to select the correct item from the dropdown menu.

'Claim Submission Date' will populate with the date you are entering your expenses.

This section will not populate until expenses have been entered and 'Update Totals' clicked. (See next slides.)

3/10 SUBMITTING A CLAIM

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Submit Expenses

Consultant/EV	Consultant/EV Name
200949	

Expenses Totals

The claim submission date will self populate with the date you are entering your expenses

Expenses Details

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)
☐	ACCOMODATION ▾	8000057321	13.08.2014		One overnight stay approved by territory office	60.00		
☐	MILES ▾	8000057321	13.08.2014		Home address to hotel to centre return journey	95		
☐	CAR PARKING ▾	8000057321	13.08.2014		Pay and display at hotel	10.00		
☐	SUBSISTENCE ▾	8000057321	13.08.2014		Dinner	9.50		

①	Select the type of expense you are claiming for from the drop down box.
②	Enter the Transaction No.
③	Enter a clear description for each item being claimed
④	Enter the Amount or number of miles for each item
⑤	You won't be able to edit the following fields. They will self-populate in the next step: • Actual visit date • Rate (£) • Total (£)

Expense

ACCOMODATION ▾
ACCOMODATION
CAR PARKING
MILES
POSTAGE
SUBSISTENCE
TELEPHONE
TRAVEL FARES
OTHER

4/10 SUBMITTING A CLAIM

Note that you can enter more than one activity at a time

Expenses Details

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)
☐	ACCOMODATION ▼	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00
☐	MILES ▼	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00
☐	CAR PARKING ▼	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00
☐	SUBSISTENCE ▼	8000057321	13.08.2014	23.07.2014	Dinner	9.50	1.00	9.50
☐	TRAVEL FARES ▼	8000057334	13.08.2014		Train from York to Darlington centre visit	15.00		
☐	TRAVEL FARES ▼	8000057334	13.08.2014		Mileage from home to York station return	18		

1	Select the correct description for each item from the drop down box	
2	As you enter your expenses click, on '**Update Totals**' at the bottom of the page to refresh your claim totals	
3	The following columns will self-populate: • Actual visit date • Rate • Total	

Delete   **Update Totals**   **Submit Expenses**

PLEASE NOTE
At this stage your expenses will not be saved.

5/10 SUBMITTING A CLAIM

Expenses Totals

Activity	Units	Rate	Total Amount	Open Status	Rej. Status	Approved Status
ACCOMODATION	60.00	1.00	60.00	60.00	0.00	0.00
MILES	95.00	0.40	38.00	38.00	0.00	0.00
CAR PARKING	10.00	1.00	10.00	10.00	0.00	0.00
SUBSISTENCE	9.50	1.00	9.50	9.50	0.00	0.00
TRAVEL FARES	33.00	1.00	33.00	33.00	0.00	0.00

This section will also populate when you click **'Update Totals'**

The amount for each item will populate in the **'Open Status'** column

Expenses Details

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)
☐	ACCOMODATION ▾	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00
☐	MILES ▾	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00
☐	CAR PARKING ▾	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00
☐	SUBSISTENCE ▾	8000057321	13.08.2014	23.07.2014	Dinner	9.50	1.00	9.50
☐	TRAVEL FARES ▾	8000057334	13.08.2014	23.07.2014	Train from York to Darlington centre visit	15.00	1.00	15.00
☐	TRAVEL FARES ▾	8000057334	13.08.2014	23.07.2014	Mileage from home to York station return	18.00	1.00	18.00
☐	ACCOMODATION ▾		13.08.2014					

6/10 SUBMITTING A CLAIM

City& Guilds

Expenses Totals

Activity	Units	Rate	Total Amount	Open Status	Rej. Status	Approved Status
ACCOMODATION	60.00	1.00	60.00	60.00	0.00	0.00
MILES	95.00	0.40	38.00	38.00	0.00	0.00
CAR PARKING	10.00	1.00	10.00	10.00	0.00	0.00
SUBSISTENCE	9.50	1.00	9.50	9.50	0.00	0.00
TRAVEL FARES	33.00	1.00	33.00	33.00	0.00	0.00

Expenses Details

Your expenses have been saved successfully ③

②

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)	Error Message
☐	ACCOMODATION	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00	Ok
☐	MILES	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00	Ok
☐	CAR PARKING	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00	Ok
☐	SUBSISTENCE	8000057321	13.08.2014	23.07.2014	Dinner	9.50	1.00	9.50	Ok
☐	TRAVEL FARES	8000057334	13.08.2014	23.07.2014	Train from York to Darlington centre visit	15.00	1.00	15.00	Ok
☐	TRAVEL FARES	8000057334	13.08.2014	23.07.2014	Mileage from home to York station return	18.00	1.00	18.00	Ok

Error Message

Transaction No does not belon
Transaction No does not belon
Transaction No does not belon
Transaction No does not belon

①	Click **'Submit Expenses'** at the bottom of the screen to save. This will make the claim available for the Territory Office to process .
②	An additional **Error Message** column will appear on the right, net to the 'Total'. If the claim was submitted successfully, it will say 'OK'. Otherwise, it will display an error message.
③	A **success message** will also appear in red print here, to indicate that the claim was successfully submitted. If there are errors, it will indicate so.

Expenses Details

There are some errors.Please see them in error message column.

Delete   **Update Totals**   **Submit Expenses** ①

Now Complete the EQA expenses receipt form available on Aspire

Scan all your receipts and email with the expenses receipt form to eqaclaims@cityandguilds.com or qualityilm@i-l-m.com
Please include the following in your email heading;

- 8000 transaction number
- relevant quality team

Please complete ONE expenses receipt form for each Quality team

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①	Select **Submitted Expenses** from the drop down box
②	Select a **date range or period** – this selection selects the Claim Submission date NOT the Actual visit date
③	Click **'Search'**
④	These columns will be after the **'Totals'** column – you will see which claims and been approved, if any have been rejected and a reason in the LO note column

Search

Define your search by using the criteria below. The fields may change depending upon the selections made.

Show me: Submit Expenses ▼   ①

For Awarding org City & Guilds ▼

For period * ⦿ last month ▼   ②
today
since yesterday
last week
last month
last year   ③

Or From * ○ [5]

Search

Expenses Totals

Activity	Units	Rate	Total Amount	Open Status		
ACCOMODATION	60.00	1.00	60.00	0.00		
MILES	95.00	0.40	38.00	0.00		
CAR PARKING	10.00	1.00	10.00	0.00		
SUBSISTENCE	9.50	1.00	9.50	0.00	0.00	9.50

Expenses Details

Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)
ACCOMODATION ▼	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00
MILES ▼	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00
CAR PARKING ▼	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00

Status	Receipts Received	LO Notes
Approve ▼	☑	
Approve ▼	☐	
Reject ▼	☐	No receipt
Approve ▼	☑	

④

10

9/10 AMENDING AND SUBMITTING A CLAIM

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	Description
1	Select **Submitted Expenses** from the drop down box
2	Select a **date range** – this selection selects the Claim Submission date NOT the Actual visit date
3	Click **'Search'**
4	To delete an entry tick the '**delete'** box next to the expense line
5	Click '**delete'** at the bottom of the claim screen
6	You will then see a pop box asking you to confirm deletion

10/10 VIEWING PROCESSED CLAIMS

City& Guilds

1	Select **My Processed Expenses** from the drop down box
2	Select a **date range** – this selection selects the Claim Submission date NOT the Actual visit date
3	Click **'Search'**
4	These columns will be after the **'Totals'** column – you will see which claims and been approved, if any have been rejected and a reason in the LO note column

Search

Define your search by using the criteria below. The fields may change depending upon the selections made.

Show me: **①** Processed Expenses ▼

For Awarding org **②** City & Guilds ▼

For period * ⦿ last year ▼

Or From * ○ [   ] To [   ] **③**

Search

Expenses Totals

Activity	Units	Rate	Total Amount	Open Status	Rej. Status
ACCOMODATION	60.00	1.00	60.00	0.00	0.00
MILES	95.00	0.40	38.00	0.00	0.00
CAR PARKING	10.00	1.00	10.00	0.00	10.00
SUBSISTENCE	9.50	1.00	9.50	0.00	0.00

Expenses Details

Expense	Transaction No	Claim Submission Date	Actual Visit Date	Description	Amount(£)/No.Miles	Rate(£)	Total(£)
ACCOMODATION ▼	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00
MILES ▼	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00
CAR PARKING ▼	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00

These are all your expense claims processed by a Quality Team, submitted in the selected period. You can see if they have been approved/rejected (Status) and any notes the Office may have made.

④

Status	Receipts Received	LO Notes
Approve ▼	☑	
Approve ▼	☐	
Reject ▼	☐	No receipt
Approve ▼	☑	

12