

EQA 09

ONLINE EXPENSES

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This section of the guide will show you 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 Territory Office to process.

### 2 – VIEWING OUTSTANDING CLAIMS

How to view a list of submitted expenses that have not yet been processed by the Territory Office.

### 3 – AMENDING AND RESUBMITTING A CLAIM

How to amend and resubmit, or delete a claim before it has been processed by the Territory Office.

### 4 – VIEWING PROCESSED CLAIMS

How to view a list of expenses that have been processed by the Territory Office, and whether they have been approved or rejected.

# EQA09: ONLINE EXPENSES

## 1. SUBMITTING A CLAIM

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:

For Awarding org:

For period \*  today

Or From \*  To

**Search**

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

**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 connection. You will need to install Silverlight (which is available for free on the internet), as well as a bespoke City & Guilds application which can be found [here](#). You will only have to install the software once. Please refer to the user guide for further information.

# EQA 09: ONLINE EXPENSES

## 1. SUBMITTING A CLAIM

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:

For Awarding org:

For period \*  today  Or From \*  To

For period \*  today  since yesterday  last week  last month  last year

**Submit Expenses**

Consultant/EV	Consultant/EV Name
200949	John Smith

**Expenses Totals**

**Expenses Details**

Delete	Expense	Transaction No	Claim Submission Date	Actual Visit Date	
<input type="checkbox"/>	ACCOMODATION		15.08.2014		
<input type="checkbox"/>	ACCOMODATION		15.08.2014		
<input type="checkbox"/>	ACCOMODATION		15.08.2014		
<input type="checkbox"/>	ACCOMODATION		15.08.2014		

1 This page will open on the right hand side.

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.)

# EQA 09: ONLINE EXPENSES

## 1. SUBMITTING A CLAIM

**Submit Expenses**

Consultant/EV	Consultant/EV Name
200949	

Expenses Totals

Expenses Details

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

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

- |   |  |
|---|--|
| 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: <ul style="list-style-type: none"> <li>Actual visit date</li> <li>Rate (£)</li> <li>Total (£)</li> </ul> |

Expense

ACCOMODATION

ACCOMODATION

CAR PARKING

MILES

POSTAGE

SUBSISTENCE

TELEPHONE

TRAVEL FARES

OTHER

# EQA09: ONLINE EXPENSES

## 1. 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(£)
<input type="checkbox"/>	ACCOMODATION	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00
<input type="checkbox"/>	MILES	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00
<input type="checkbox"/>	CAR PARKING	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00
<input type="checkbox"/>	SUBSISTENCE	8000057321	13.08.2014	23.07.2014	Dinner	9.50	1.00	9.50
<input type="checkbox"/>	TRAVEL FARES	8000057334	13.08.2014		Train from York to Darlington centre visit	15.00		
<input type="checkbox"/>	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

Buttons: Delete, Update Totals, Submit Expenses

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

# EQA09: ONLINE EXPENSES

## 1. 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(£)
<input type="checkbox"/>	ACCOMODATION	8000057321	13.08.2014	23.07.2014	One overnight stay approved by territory office	60.00	1.00	60.00
<input type="checkbox"/>	MILES	8000057321	13.08.2014	23.07.2014	Home address to hotel to centre return journey	95.00	0.40	38.00
<input type="checkbox"/>	CAR PARKING	8000057321	13.08.2014	23.07.2014	Pay and display at hotel	10.00	1.00	10.00
<input type="checkbox"/>	SUBSISTENCE	8000057321	13.08.2014	23.07.2014	Dinner	9.50	1.00	9.50
<input type="checkbox"/>	TRAVEL FARES	8000057334	13.08.2014	23.07.2014	Train from York to Darlington centre visit	15.00	1.00	15.00
<input type="checkbox"/>	TRAVEL FARES	8000057334	13.08.2014	23.07.2014	Mileage from home to York station return	18.00	1.00	18.00

# EQA09: ONLINE EXPENSES

## 1. 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

Expenses Details

**Your expenses have been saved successfully** ③

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

- 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.**

Error Message

Transaction No does not belong

Transaction No does not belong

Transaction No does not belong

Transaction No does not belong

Delete      Update Totals      **Submit Expenses** ①



# EQA09: ONLINE EXPENSES

## 1. SUBMITTING A CLAIM

Now Complete the **EQA expenses receipt form** available on the website

<http://www.cityandguilds.com/~media/Documents/help/more-help/qc-documents/EQA%20Expenses%20Receipt%20form%20docx.ashx>

Scan all your receipts and email with the expenses receipt form to this mailbox;  
[eqaclaims@cityandguilds.com](mailto:eqaclaims@cityandguilds.com)

### **Alternatively**

Attach all receipts to the EQA expenses receipt form and post to the Wakefield office (City & Guilds, 4 Red Hall Court, Paragon Business Village, Wakefield, WF1 2UN)

**Please complete  
ONE expenses  
receipt form for each  
Territory Office**

# EQA09: ONLINE EXPENSES

## 2. VIEWING SUBMITTED CLAIMS

- 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:

For Awarding org

For period \* 

- today
- since yesterday
- last week
- last month
- last year

Or From \*

Search

- 1
- 2
- 3

### 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

### 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

- 4

Status	Receipts Received	LO Notes
Approve	<input checked="" type="checkbox"/>	
Approve	<input type="checkbox"/>	
Reject	<input type="checkbox"/>	No receipt
Approve	<input checked="" type="checkbox"/>	

# EQA09: ONLINE EXPENSES

## 3. AMENDING AND SUBMITTING A CLAIM

**Search**

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

Show me:  ①

For Awarding org

For period \*

Or From \*  To  ②

③

---

**Submit Expenses**

Consultant/EV	Consultant/EV Name

**Expenses Totals**

Activity	Units	Rate	Total Amount	Open Status
MILES	234.00	0.40	93.60	93.60

**Expenses Details**

Delete	Expense	Transaction No	Claim Submission Date
<input checked="" type="checkbox"/> ④	MILES	8000112309	03.09.2015
<input type="checkbox"/>	ACCOMMODATION		03.09.2015

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

⑤

⑥ The page at <https://wdc.walled-garden.com> says: 'Please confirm the deletion of selected line(s)'

# EQA09: ONLINE EXPENSES

## 4. VIEWING PROCESSED CLAIMS

- 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: Processed Expenses 1

For Awarding org: City & Guilds 2

For period \*  last year 3

Or From \*  To

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 Territory Office, submitted in the selected period. You can see if they have been approved/rejected (Status) and any notes the Office may have made.

Status	Receipts Received	LO Notes
Approve	<input checked="" type="checkbox"/>	
Approve	<input type="checkbox"/>	
Reject	<input type="checkbox"/>	No receipt
Approve	<input checked="" type="checkbox"/>	