

MyView Expenses Approval Process Stages

This document contains details about the approval stages of the MyView Expenses process. If you have any other questions about approval stages not covered in this document, you should contact one of the below:

- For queries about your expense claim, contact Fees and Expenses (feesandexpenses@manchester.ac.uk)
- For queries or issues about using the MyView Expenses portal, contact MyView (myview@manchester.ac.uk)

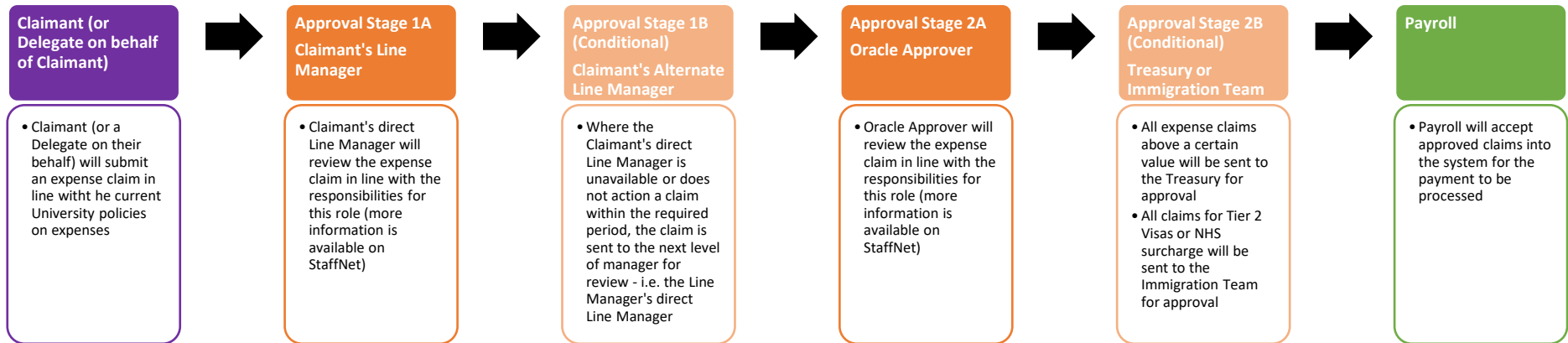
More information about MyView can be found on [StaffNet](#).

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Overview of the MyView Expenses approval process

Approval Stages



Claimant (or Delegate)

The Claimant or their Delegate should submit an expense claim for approval by selecting the correct category and sub-category, the correct cost centre code, and attaching the receipts (where relevant).

Employees can request that their expense claim raising responsibility is delegated to anyone within the University. This can be done via MyView.

Claimant (or Delegate) responsibilities within the University's expenses process

- Claims must be submitted within 3 months of incurring the expenditure
- Anything which could be procured through other routes should not be claimed through expenses – for example, travel and accommodation should be processed through Key Travel
- Expenses will not be paid in advance of an event
- Claims must be wholly, necessarily and exclusively for work purposes. If this is not the case, expenses may be paid at the discretion of the University, and income tax and National Insurance Contributions (NICs) must be deducted from the payment
- Claims must be completed accurately and use a valid cost centre code. As a claimant (or delegate) you must know the correct code at the point of submitting the expense claim
- Supporting images of original receipts are to be uploaded for each claim
- If a receipt is not present, the claim must be submitted as a taxable expense claim (with the exception of mileage claims)
- Each expense claim made must be compliant with the Financial Procedures, as outlined in the University policy
- Claimants must submit no more than 100 items in a single expense claim form

Approval Stage 1A – Claimant’s Line Manager

The Claimant’s direct Line Manager will receive an email notification asking them to take action on the expense claim (i.e. approve or reject). They will have 7 calendar days to take action on the expense claim.

If no action is taken within this 7-day approval window, the system will automatically forward the approval request up to the next level of manager – i.e. the Line Manager’s direct Line Manager (referred to as ‘Alternate Line Manager’ elsewhere in this document). More details about this are available under [Approval Stage 1B](#).

A Line Manager cannot delegate their authorisation responsibilities to anyone else. This ensures compliance with the University’s Financial Procedures, which require the person responsible for authorising an expense claim to be of a higher grade or professional standing than the claimant.

The responsibilities of a Line Manager within the University’s expenses process are outlined in the [Roles and Responsibilities of Approvers – Line Manager](#) document, available on StaffNet.

Approval Stage 1B – Claimant’s Alternate Line Manager (Conditional)

The Claimant’s Alternate Line Manager will receive an email notification asking them to take action on the expense claim (i.e. approve or reject). They will have 7 calendar days to take action on the expense claim.

If no action is taken within this 7-day window, the approval request will timeout and the expense claim will be sent back to the Claimant (or their Delegate) as ‘rejected’.

An Alternate Line Manager cannot delegate their authorisation responsibilities to anyone else. This ensures compliance with the University’s Financial Procedures, which require the person responsible for authorising an expense claim to be of a higher grade or professional standing than the claimant.

The responsibilities of an Alternate Line Manager within the University’s expenses process are outlined in the [Roles and Responsibilities of Approvers – Line Manager](#) document, available on StaffNet.

Approval Stage 2A – Oracle Approver

The Oracle Approver will receive an email notification asking them to take action on the expense claim (i.e. approve or reject). They will have 7 calendar days to take action on the expense claim.

If no action is taken within this 7-day window, the approval request will timeout and the expense claim will be sent back to the Claimant (or their Delegate) as 'rejected'.

Oracle Approvers should set a 'vacation rule' in Oracle Financials when they will be away from the University for longer than one day. Details of the 'vacation delegate' will feed through to ResourceLink via an overnight feed from Oracle Financials and update the information tables for the expenses module.

The responsibilities of an Oracle Approver within the University's expenses process are outlined in the [Roles and Responsibilities of Approvers – Oracle Approver](#) document, available on StaffNet.

Approval Stage 2B – Treasury or Immigration Team (Conditional)

Any claims that require additional scrutiny by Treasury or Immigration are sent to them for review after the Oracle Approver stage ([Approval Stage 2A](#)).

All approvers in the relevant team will receive an email notification asking them to take action on the expense claim (i.e. approve or reject). Claims sent for this conditional approval will not timeout.

Claims that are approved at this stage will move forward to Payroll. Claims that are rejected will be sent back to the Claimant (or their Delegate).

Treasury Approval

Any sub-category above a specified value will be sent to the Treasury team for review and action.

Immigration Approval

All claims with the 'Tier 2 Visa and NHS Surcharge' sub-category will be sent to the Immigration Team within HR Services for review and action.

Payroll

The Payroll Team is responsible for taking action on approved expense claims. There is no approval window/timeout period for this stage.

Payroll will accept approved expense claims into the system so they are ready for payment in the next appropriate and available payroll run:

- Non-taxable claims will be paid on the Weekly Expenses Payroll
- Taxable claims will be paid alongside the Claimant's monthly salary (either mid-month or end-of-month)