

New Expenses System

From **1st September 2018** the expenses system is going online!

This will be for all expense claims, including study leave; therefore please can you follow the following process:

(Please note all courses which took place prior to 1st September should be submitted on a paper form)

Step 1

The Study Leave Application Form to go onto a course remains the same and the paper form still requires the usual signatures:

All Trainees	Non Training Grades	Consultants
Educational Supervisor	Educational Supervisor	Clinical Director
Rota Manager	Rota Manager	Doctor's
Trainee Doctor	Doctor's	

Step 2

Submit the completed form to the Clinical Education Department.

Your mandatory training will be checked by the Education Administrator, as claims will not be approved without you being compliant with your training.

To check if you are up to date with your training, you can check your Statutory Mandatory training on the Compliance Checker on Agadio and your Clinical Mandatory training on Training Tracker.

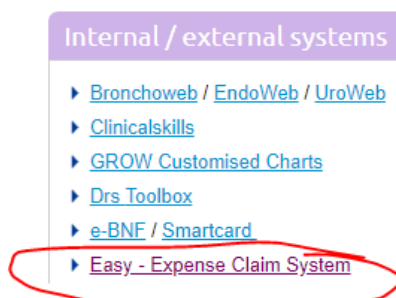
Step 3

Once your request has been approved by the Director of Clinical Education, you will receive a confirmation email from the Education Administrator confirming the request, any outstanding mandatory training to complete, how many study leave days are remaining to use and the amount of funds available.

Step 4

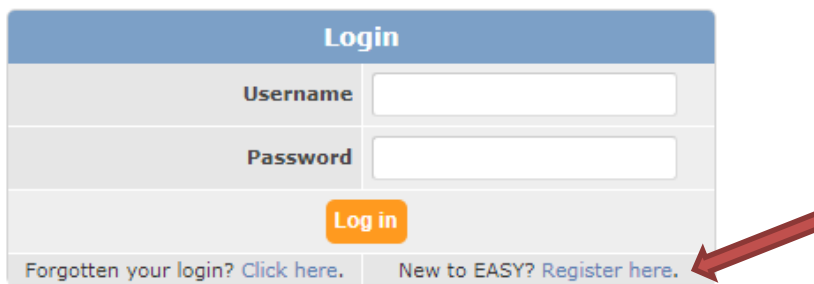
To claim the expenses you need to Self-Register with EASY.

You can access the system through - <https://dgt.easy.giltbyte.com/> or use the link available on www.dvh.nhs.uk/adagio... Look for this link in the INTERNAL/EXTERNAL SYSTEMS section:



There is also a mobile app which is available for iOS and Android.

If you've **never** made an expenses claim using the EASY System, you will need to register with the system to create a user account. To do this click on the Register here link on the login page.



You will then be asked to provide your Email Address or Employee Number (which will be found on your payslip).

You will receive an email that has a token which the system will prompt you for, in order to confirm your email address and set up your account. Please note that the token is only valid for 2 days. You can either copy and paste the token into the field on the Token Entry page and click on the Submit button or click on the link in the email. You'll then be asked to create a Password and a Security Word.

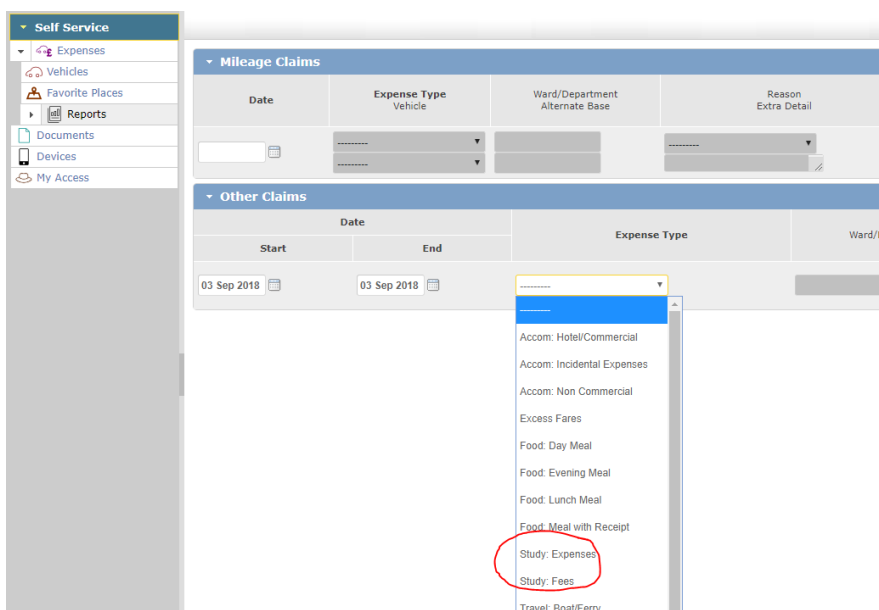
Lastly, you will receive a welcome email confirming your username; your username will be your employee number.

Please note if you have forgotten any of your login details, you can click 'forgotten password' which will send you a reminder of your username and a link to reset your password if required.

Step 5

To make a claim you select 'Expenses' under the Self Service tab. This will take you to an overview of all the expenses you have submitted and their status.

To add a claim, under the unsubmitted claims, click add, then fill in the details of your claim under the OTHER CLAIMS section, making sure to select 'Study Expenses or Study Fees' for the expense type.



You will be required to upload scans of all the receipts.

Please note any claims which exceed your study leave allowance will be rejected, therefore please check the amount you are submitting against the confirmed budget in your confirmation email.

Please note:

You need to ensure your home and work base details are accurate.

If you have travelled by car, please do check your vehicle details on the system are accurate. If the details are not correct you can add a car or edit the information under the Vehicles section. This information will need to be verified by Payroll.

If you are paying for a course ahead of the course date, you can submit the expenses for this and will need to select the date of payment, rather than the date of travel.

Step 6

Once submitted your request will be sent to Clinical Education for review and we will check any outstanding mandatory training has been completed prior to authorisation.

You can monitor the progress of your claim through the EASY system.