External Examiners Using Aston Staff Portal for Claiming Expenses

Contents
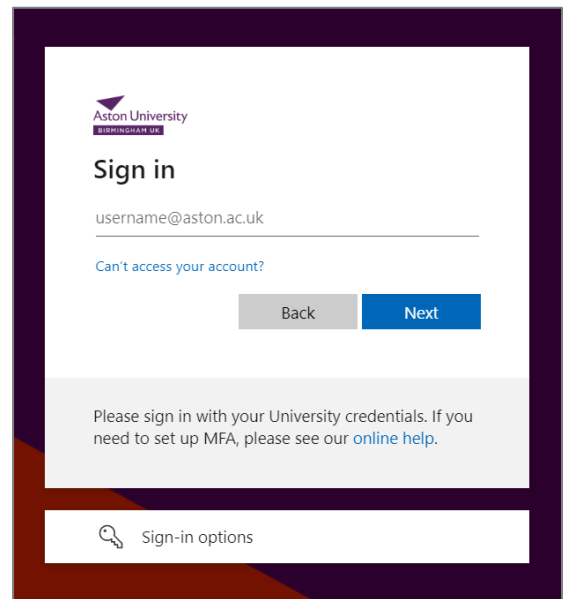
Accessing the Aston Staff Portal

> ➤ From the Aston homepage (www.aston.ac.uk), Click on the link in the top right hand corner for 'Staff (One Aston)'. This is Aston's staff intranet.
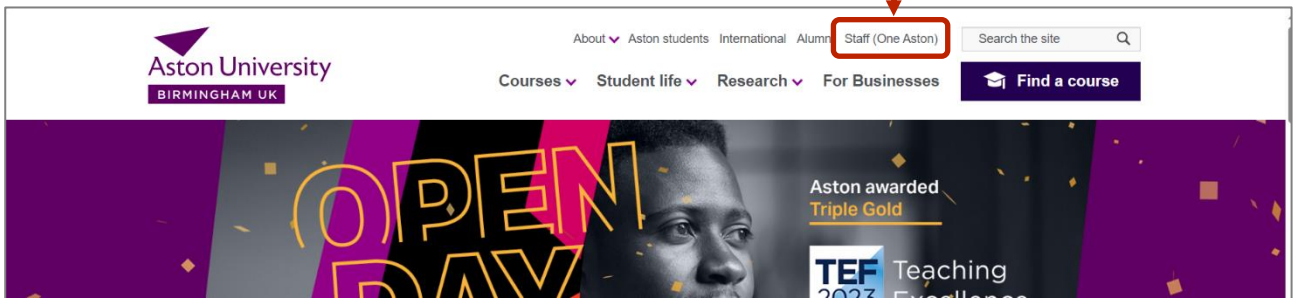
> ➤ If you haven't already signed into your Aston staff network account, you will be prompted to at this point.
>
> ➤ You may need to either sign out of your home institution's MS365 account first, or open this link in an incognito browser to login.
>
> ➤ You will need to login to your Aston staff network account as username@aston.ac.uk (e.g. smithj@aston.ac.uk) rather than your email address (e.g. j.smith@aston.ac.uk)

> ➤ Within One Aston, go to Systems > HR and Wellbeing > Aston Staff Portal (People XD)
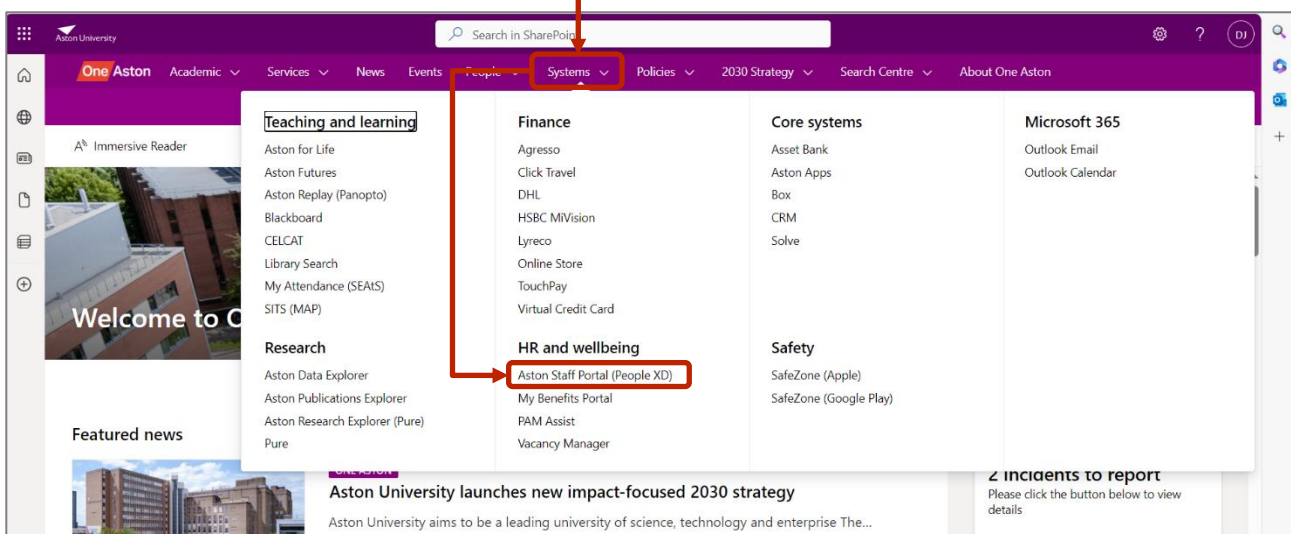
> ➤ This will take you to the Aston Staff Portal landing page in One Aston, where you can log in to the Aston Staff Portal view guidance for using the Aston Staff Portal, and any updates and important notices.
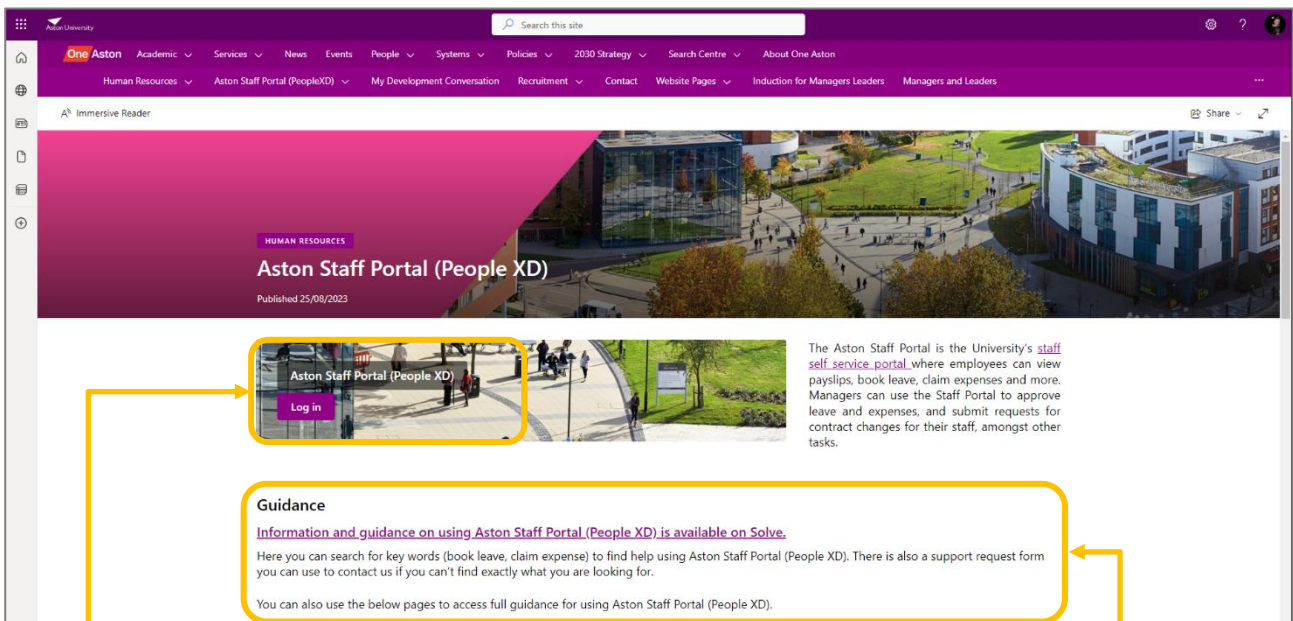
Use the log in option to access the Aston Staff Portal

Scroll down on the page for guidance and updates.

> ➤ You can also use click on the App Launcher button (top left of screen) in One Aston and select People XD. This will bypass the Aston Staff Portal landing page for viewing guidance and is a shorter route.
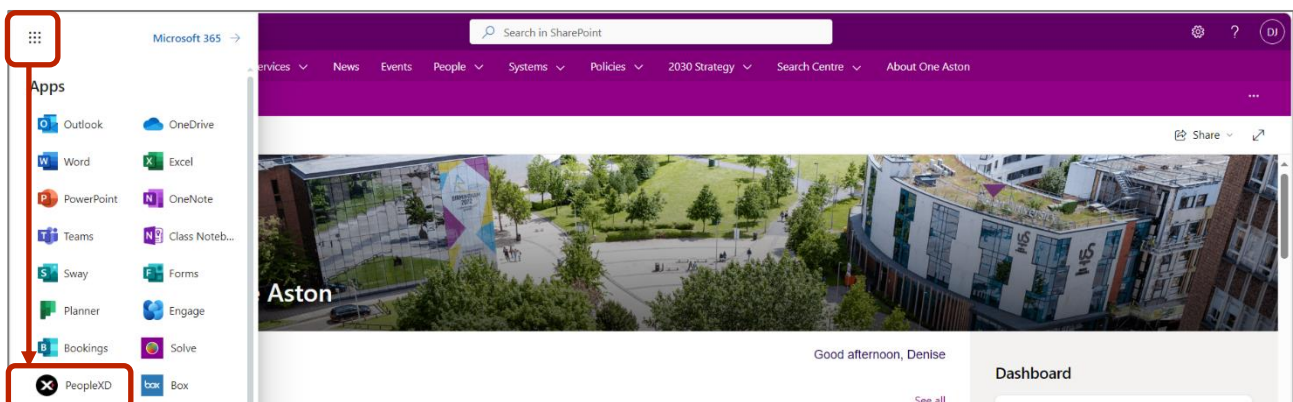
? If you have difficulties logging in to One Aston with your Aston staff network account details, or have accidentally locked yourself out, contact solve@aston.ac.uk in the first instance.

Onboarding

When you first log in to the Aston Staff Portal you will enter on the onboarding screen. You will come to this screen each time you log into Aston Staff Portal, until you have completed the onboarding checklist. This involves checking and adding to the personal information Aston University holds on you.

➢ Click on the action buttons at the side of each step in turn and review or amend your details as appropriate. When you have saved any changes the status will turn to Completed.

➢ When each onboarding step is completed, you will have a 'Complete Onboarding' option at the bottom of the screen. Tick the box to say you have completed all items first.

The Employee Dashboard

Once you have logged in to Aston Staff Portal (and completed onboarding) you will be taken to your **Employee Dashboard.**
Here's what you can do from the Employee Dashboard.

Notifications you need to read or action

Access your **Profile,** Upload a photo or **Log out**

Minimise / maximise the left menu

Access your **Profile**

View your payslips

Claim your expenses

≡ Employee Dashboard ▾

🔍 Search Dashboards or Widgets

🔔 JM

JM Jorah Mormont
1006778

Employee Dashboard

👤 Welcome

📅 Leave Requests

💳 Payment

⭐ My DC

☰✓ Expenses

🎓 Training

📄 Timesheets

Aston University

My Week

ACTIONS ▾

13-May-19 - 19-May-19 ▾ ‹ › ≡

Mon 13th	Tue 14th	Wed 15th	Thu 16th	Fri 17th	Sat 18th	Sun 19th
7.18	7.18	7.18	7.18	7.18		

My Appointments

Position	Department	FTE	Start Date
Cleaner In Charge 516588-1	Estates & Capital D...	1	15-Apr-2019

Accessing your Profile

To view your Profile click on your initials or photograph (if you have uploaded one) and select My Profile.
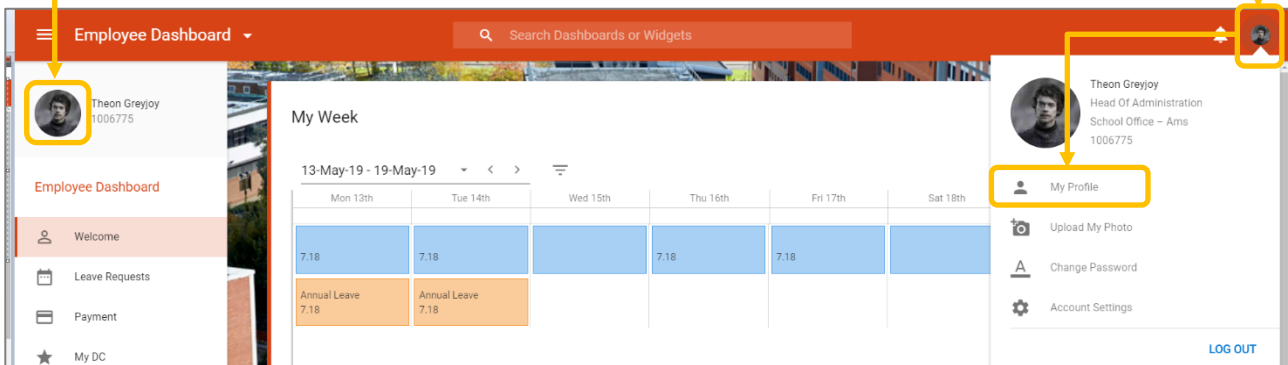
In your Profile screen there are a number of options down the left hand side that you can expand, view and amend. The relevant ones for external examiners are all covered in this guide.

NB: Bank details cannot be updated using the Staff Portal. If you want to change your bank details, please email payroll@aston.ac.uk

View and Update Contacts

You can view and update your home address, telephone numbers and personal email address through the Staff Portal.

NB: You **will not** be able to amend your Aston work email address.
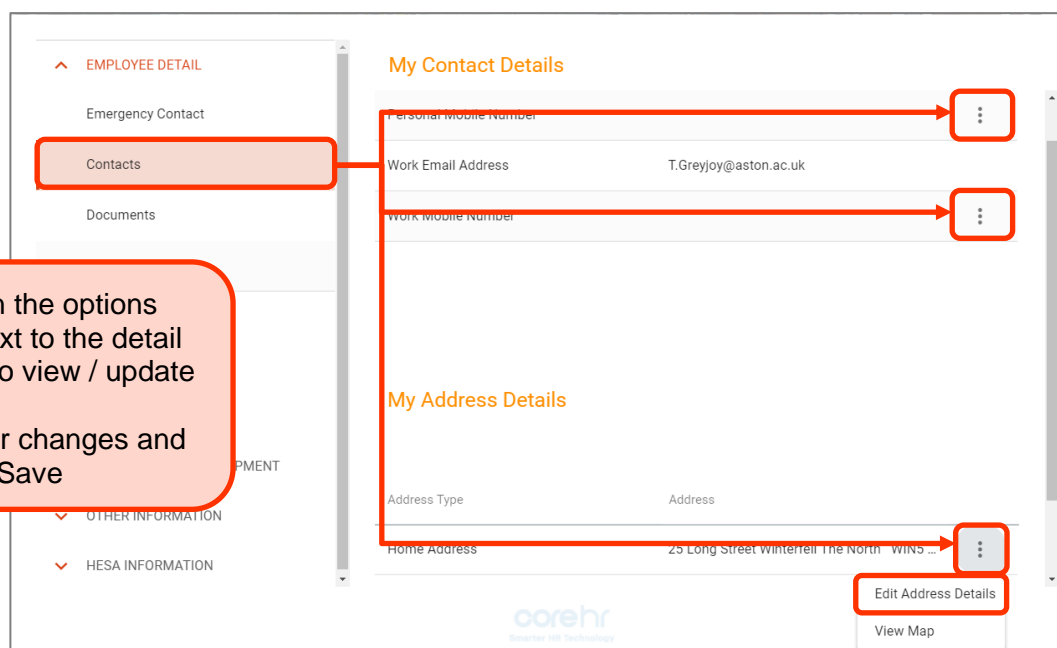
➢ Click on the options button next to the detail you want to view / update

➢ Make your changes and Save

Viewing & Updating Diversity Details

View and update your diversity information. There are two parts to this; background and disability.

➤ Click on the appropriate section, update your details and click on Save.

Making Expense Claims through Aston Staff Portal

You will **only** be able to use the Staff Portal to claim your expenses after you have had your full right to work check. Please allow up to 5 days after your full right to work check for the Portal to be available for this.

Any expense claims submitted **and** approved by the 15th of the month will be paid on the 26th of the same month. Please be aware that the cut off date may be earlier for months with University holidays such as Easter or Christmas.

The Expenses Tab in Portal – at a glance

➢ From the Employee Dashboard, click on the Expenses tab

This information relates to your last entered expense claim

Once your expenses have been paid, your remittance advices will show here

➢ Click on the Action button; three options become available:

New Expense Claim. Create a brand new expense claim.
Manage Current Expense Claim. Carry on adding to / amending your most recently saved expense claim.
Manage All Expense Claims. View a list of all saved and submitted expense claims. You can then choose to view, update, submit / unsubmit, print or delete your expenses claim (dependant on its status)
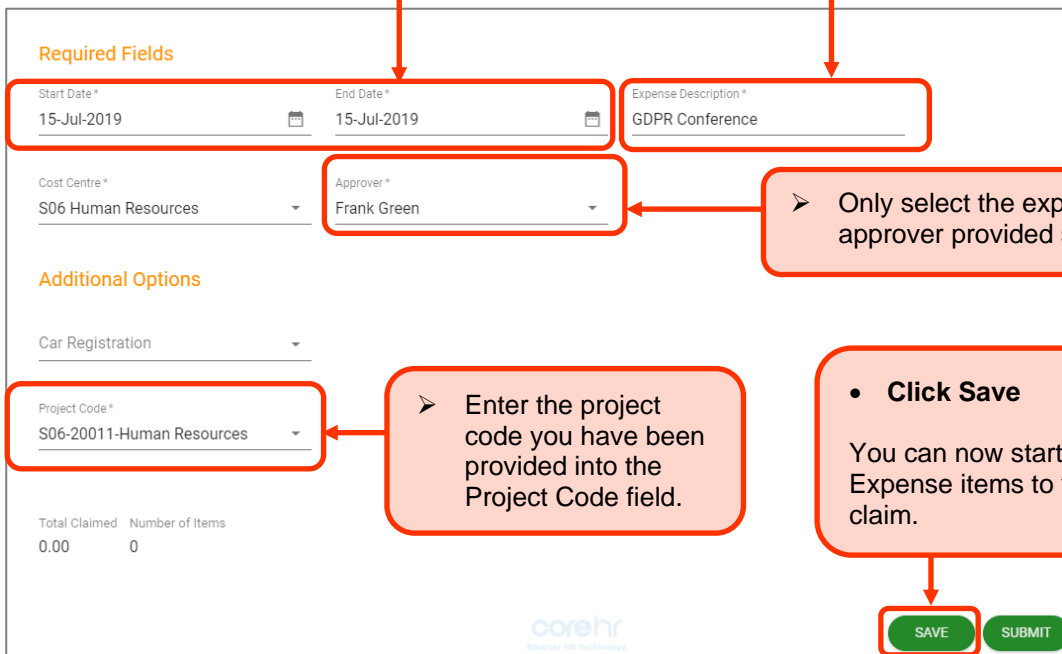
Creating a New Expense Claim

➢ Click on the action button, and then select New Expense Claim.

ACTIONS ▲

New Expense Claim

Manage Current Expense Claim

Manage All Expense Claims
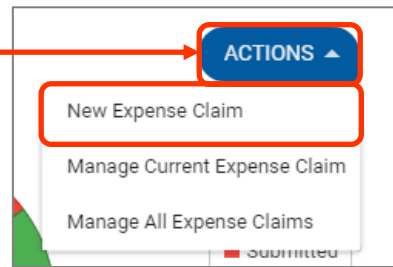
Complete the header (top section) of your expense claim

➢ Enter the dates you are claiming for. All claims must be in the past.

➢ Give your expense claim a description
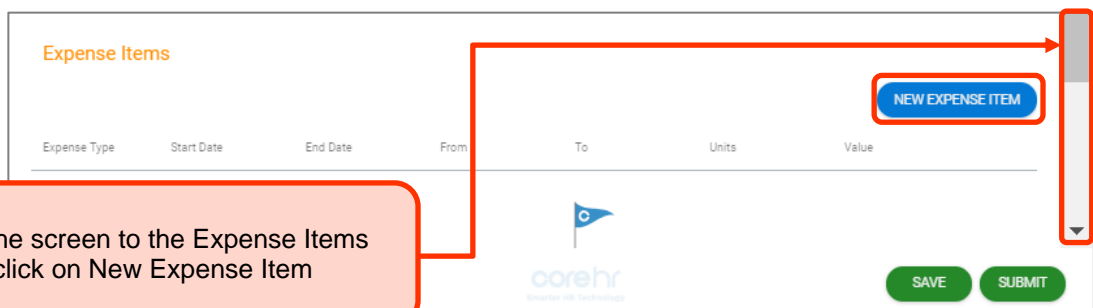
Required Fields

Start Date *	End Date *	Expense Description *
15-Jul-2019	15-Jul-2019	GDPR Conference

Cost Centre *	Approver *
S06 Human Resources	Frank Green

➢ Only select the expense approver provided separately

Additional Options

Car Registration

Project Code *
S06-20011-Human Resources

➢ Enter the project code you have been provided into the Project Code field.

- **Click Save**

  You can now start to add Expense items to your claim.

Total Claimed	Number of Items
0.00	0

corehr

SAVE   SUBMIT

Expense Items

NEW EXPENSE ITEM

Expense Type	Start Date	End Date	From	To	Units	Value

corehr

SAVE   SUBMIT

Scroll down the screen to the Expense Items section, and click on New Expense Item

Add Expense Items to your claim (in GBP)

In the expense item form complete the following fields:

➤ Select the **Expense Type**. You can start typing in the Expense Type box to bring back results. A full list of Expense Types is available on the Portal guidance pages and at the back of this guide.

➤ **Whether a receipt is available to upload or not.**
   o This will be visible for all Expense Types other than Mileage.
   o Some items can be claimed without a receipt, refer to the Expenses Type list.

➤ Enter a short **description for your receipt** (if attaching a receipt)

➤ **Upload your receipt** (if attaching a receipt)

➤ The **value** of your item

➤ **Location from and to** (where applicable)

➤ The **start and end date** (by default this will populate from the claim header, change as necessary)

➤ **A detailed expense Item description**

Expense Detail
Employee Dashboard > Expense Claims > Expense Claim (Item: 78170) > Expense Detail

If you need to view your receipt click on the Actions Button.

ACTIONS ▾

Expense Item

☐ Expense item with foreign details

Expense Type		Description*	Receipt
Car Parking/Tolls Over £10 ▾	Receipt available to upload ▾	Receipt	Parking receipt.docx ✕ ⬆

Value	From Location	To Location
15	▾	▾

Start Date*	End Date*	Expense Item Description
15-Jul-2019 📅	15-Jul-2019 📅	Parking receipt for GDPR conference

Start Time ▾	End Time ▾

➤ Click Save or Save and Add New (expense item details).

SAVE   **SAVE AND ADD NEW**

Submitting your expense claim

Important notes on receipts

- **Only one document can be uploaded to each expense item,** although you can add multiple items to an expense claim.
- If you want to add multiple receipts to an expense item you will need to first scan all the receipts into one document before attaching.
- If you try to attach more than one document to an expense line, only the last uploaded one will be saved

- We recommend you keep your paper receipts until your expenses have been paid.

➢ Add multiple Expense Items until your claim is finished

➢ Check your expense claim. *You will need to use the scroll bar to go up and down the screen*

➢ Submit your expense claim. This will go to the designated approver. You will receive an email to confirm submission, and also when your approver approves or rejects your expense claim.

➢ You may also want to Save your expenses claim and add more items to it later.

Expense Claim (Item: 78170)

Employee Dashboard > Expense Claims > Expense Claim (Item: 78170)

Required Fields

Start Date *	End Date *	Expense Description *
22-Apr-2019	23-Apr-2019	Equality & Diversity Conferene Londo...

Cost Centre *	Approver *
S06 Human Resources	Arya Stark

Additional Options

Car Registration

Project Code *
S06-20011-Human Resources

Total Claimed Number of Items
65.50   2

Click here for terms and conditions.

Expense Items

NEW EXPENSE ITEM

Expense Type	Start Date	End Date	From	To	Units	Value	
Car Parking/Tolls...	22-Apr-2019	23-Apr-2019				25.00	⋮
Mileage	22-Apr-2019	23-Apr-2019	Aston	Stafford	90	40.50	⋮

oorehr

SAVE   SUBMIT

Expense Header – The general details of your claim.

Use the scroll bar to move between the header and your expense items.

Expense Items – The specific details of your claim, with receipts attached.

Use the action button to make changes to an expense item if needed.

Saving your claim will allow you to add more expense items before you submit it.

➢ Submit your expense claim

Viewing/Updating your Expense Claims

If you have saved your expense claim and want to add to it, make changes before you submit, or just view a submitted expense claim you will need to:

> ➤ Go to the Expenses Tab in the Aston Staff Portal
>
> ➤ Click on Actions, and then Manage All Expense Claims

> ➤ In the list of expense claims, select the action button next to the relevant claim and select View/Update

Use the scroll bar to move between the header and your expense items.

> ➤ Make your changes and then either Submit or Save your claim.

Unsubmitting a Claim

If you have submitted an expense claim but notice that you have made a mistake, you can still make a change to your claim up until the point it is approved.
To do this, in the list of expense claims select the action button next to the claim you wish to view or update and select Unsubmit.

Resubmitting an expense claim

If you unsubmitted a claim to make changes, or have had a claim rejected by your manager you will need to re-submit it for payment.

To do this in the list of expense claims, select the action button next to the relevant claim and select View/Update.

Now follow the instructions for Viewing/Updating your Expense Claims to edit and submit your claim.

Viewing Payment Details

From the Payments tab in the Staff Portal you have several options

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➢ From the **Employee Dashboard** select the Payment tab

Click here to view and print any payslip

Click here to view and print your selected payslip.

Click here to **view and print your most recent P60.** You can also select older P60's.

Viewing and Printing your Payslips

From the Payment Tab, select either your most recent or a historic payslip to view it. A password authentication box will appear, enter your University Password to view your payslip.

Confirm Password

Password*
••••••••
👁

Please confirm your password

CANCEL   OK

The details will become visible once the password has been entered.
➢ to view the payslip select **Full Payslip.**

My Payslips   VIEW ALL

26th April 2019   FULL PAYSLIP

26th March 2019   Total Earnings   £1,940.39

26th February 2019   Total Deductions   £368.97

25th January 2019   **Net Pay**   **£1,571.42**

21st December 2018

26th November 2018

Click here to download and then **print** your payslip

Full Payslip
Employee Dashboard > Full Payslip

RATE CURRENT   DOWNLOAD PDF

Mr Tyrion Lannister   Personnel No: Payslip Date: :   25-Jan-19
Casterly Rock   G000001   Pay Period: Jan-2019
Westeros   NI number: AB123456C
                                           Monthly Aston   **Aston University**
W15 GOT   Pay Group: University
Uk
Cost Centre: Medical School

Gross Earnings				Details		
Description:	Hours:	Rate:	Value:	Pay Grade:	**Grade 06** Point:	**20**
SALARY			2,064.25			
Scottish Widows Flexi			-123.86	Rate Current:	24,771.00	
				Tax Code:		
				1071L Tax Basis:	Week 1 NI Letter:	A
Total Pay:			1,940.39			
Gross Pay for PAYE:			1,940.39			

Deductions			Cumulatives (Year-to-date)		
Description:	This Period:	Year to Date:	Gross Earnings:	16,919.74 Pre Tax Deductions:	0.00
Tax	209.40	1,756.80	Taxable Pay:	16,919.74 Employee NI:	1,272.23
Student Loan		876.00	Tax:	1,756.80	

Appendix 1: Expense Types and whether receipts are needed

Wherever possible, external examiners should ask their contact in departments to book travel and accommodation through Key Travel.

Travel

Expense Type	Expense Code	Receipt required?
Mileage (UK)	3000	No
Car Parking/Tolls under £10	4362	
Car Parking/Tolls over £10	4363	Yes
Air Fares (UK)	4351	
Rail (UK)	4355	
Vehicle Hire (UK)	4357	
Taxi Fares (UK)	4360	
UK Travel Other	4353	
Overseas Travel: Air Fares	4301	
Overseas Travel Other	4303	
Overseas Travel Rail	4305	
Overseas Travel Vehicle Hire	4307	

Subsistence

Expense Type	Expense Code	Maximum Reimbursable	Receipt Required?
UK Travel General Subsistence	4356	Uncapped	Yes
UK Subsistence up to 5 hours	1025	£5	No
UK Subsistence btw 5 and 10 hours	1026	£10	
UK Subsistence 10+ hours	1027	£15	
UK Subsistence Full Day & Evening Meal	1028	£25	
Overseas Travel General Subsistence	4306	Uncapped	Yes
Overseas Subsistence up to 5 hours	2025	£5	No
Overseas Subsistence btw 5 and 10 hours	2026	£10	
Overseas Subsistence 10+ hours	2027	£15	
Overseas subsistence Full Day & Evening Meal	2028	£25	

Accommodation

Expense Type	Expense Code	Maximum Reimbursable	Receipt Required?
Family and Friends Allowance (Taxable Benefit)	4560	£25	No
Accommodation (UK)	4350	Uncapped	Yes
UK Travel Accommodation London	3001	£150	No
UK Travel Accommodation Outside London	3002	£100	No
Overseas accommodation	4300	Uncapped	Yes
Overseas accommodation	3003	£150	No

Other expense types

Expense Type	Expense Code	Receipt required?
Books Print	3022	Yes
Carriage/Delivery Charge	4201	
Computer Consumables	3054	
Conference Fees	4502	
Consumables: General	3509	
Equipment: Other	7011	
Exam Fees	4504	
Hospitality + Entertainment: External	3035	
Hospitality + Entertainment: Internal	3036	
Legal Services	4509	
Postage	4204	
Recruitment Removal Expenses	3044	
Software Licences	3055	
Stationary	4008	
Subscription	4550	
Telephones Mobiles	4102	
Telephones: Special Lines	4104	
Training Course	4515	
UK Personal Incidental Expenses	3004	
Overseas Personal Incidental expenses	4309	