

Selima user guide

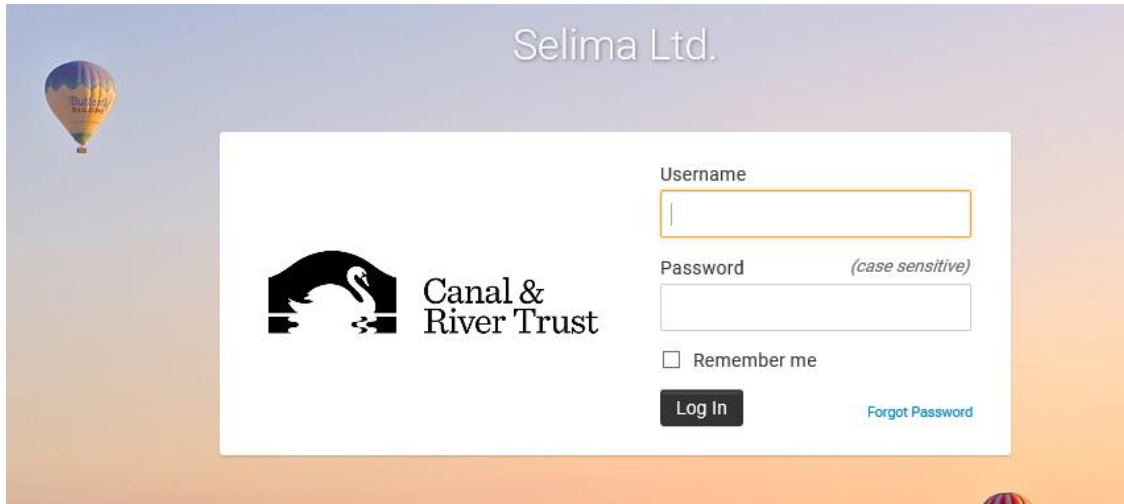
Contents:

<u>Topic</u>		<u>Page</u>
Logging in & accessing your details	do not skip	2
Adding you bank details	do not skip	3
Selecting your approver	do not skip	4
Adding your vehicle details – so you can claim mileage	do not skip	5 - 6
Creating a mileage claim & submitting claims		6 – 8
Claiming other expenses		9
Saving favourite journeys & duplicating claims		10
Payment timescale		11
Troubleshooting		12 - 13

Logging in & accessing your details

Step 1:

Access the Selima expenses system online at <https://live.selima.co.uk/CRTSecure/Account/LogOn> and enter the username & password sent to you by email



You will be directed to change this password to one of your own choosing the first time you log in.

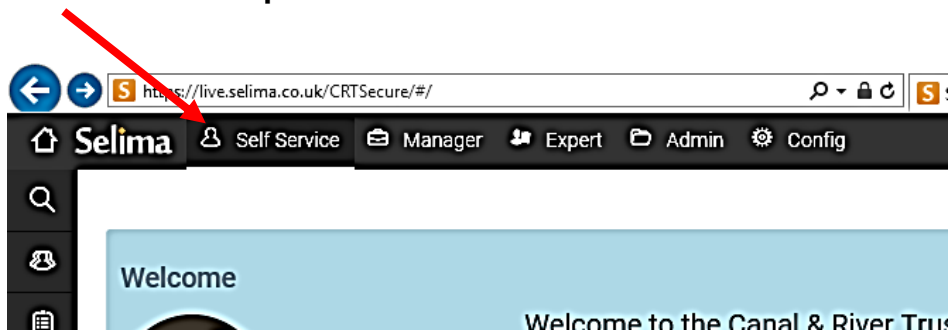
Note:

Take care not to include any spaces at the beginning or end of your password, especially if you copy & paste it from your email or a saved document.

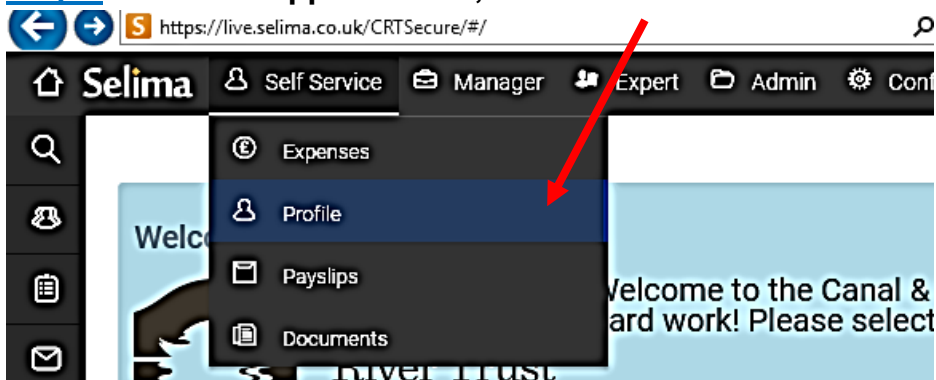
Your username will include a full stop between your first name and surname.

If you forget your password or find that it's expired - please email volunteer@canalrivertrust.org.uk to request a **password re-set** remembering to give your full name. Users are not able to re-set their own password.

Step 2: Click Self Service in the top left of the screen

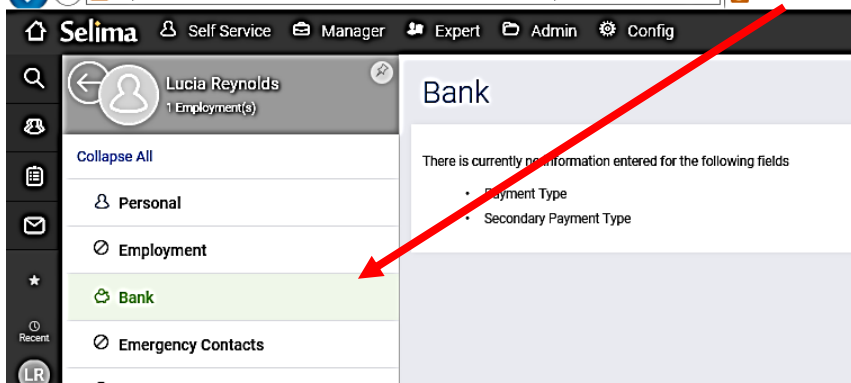


Step 3: A list will appear below, click Profile

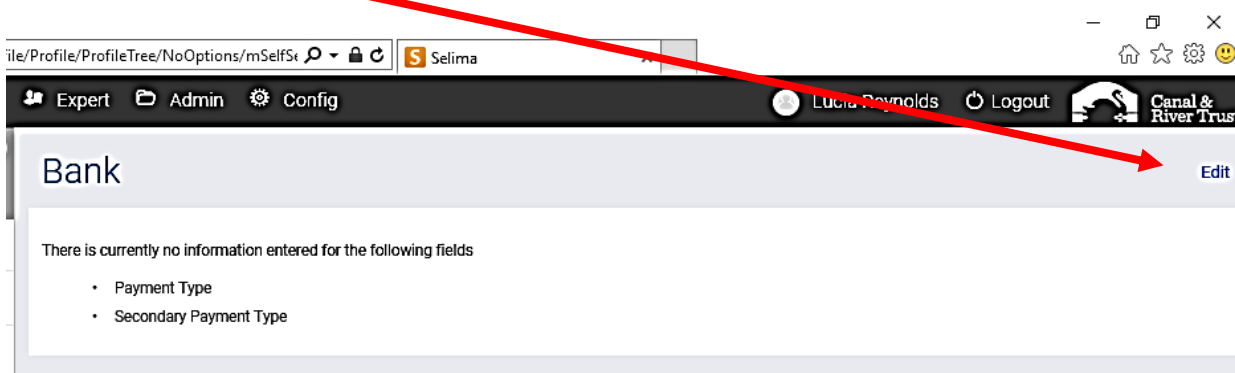


Step 4: You will now see another list – click on Bank

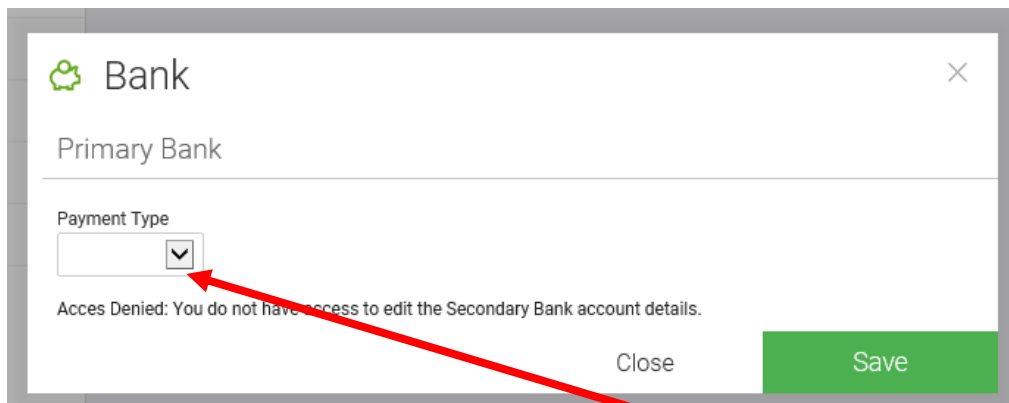
Adding your bank details



Step 5: You are now in the Bank screen, to enter your bank details to receive payments.....click 'Edit' in the top right corner of that screen.

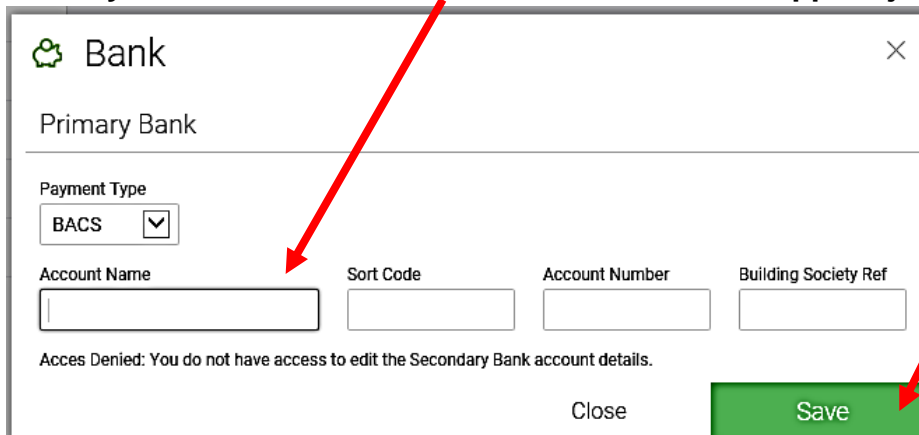


N.B. the next screen may take a few moments to load up, then a small window will appear



Step 6: Click the arrow next to the Payment type box.....then click BACS.....

Enter your bank account details in the boxes that appear just below it & Save



Enter your **sort code WITHOUT dashes**

Your payment details are now complete. Next, select the correct approver for your claim

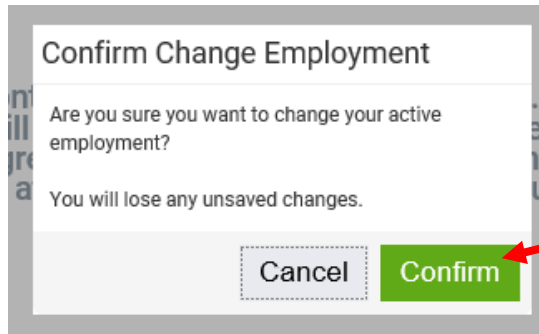
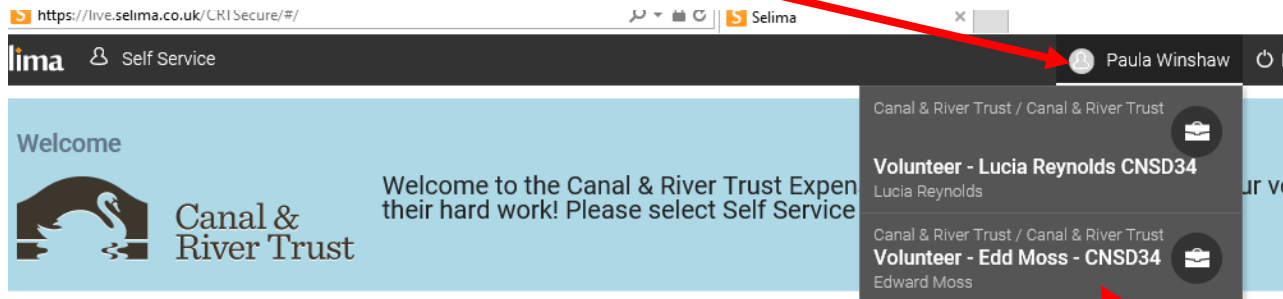
Selecting the correct approver for your claim:

If you perform more than one volunteering role and/or volunteer at more than one location please be sure to select the correct approver **before** entering your claim details.

These approvers are usually your Volunteer Task Managers [the people you report to within the Canal & River Trust].

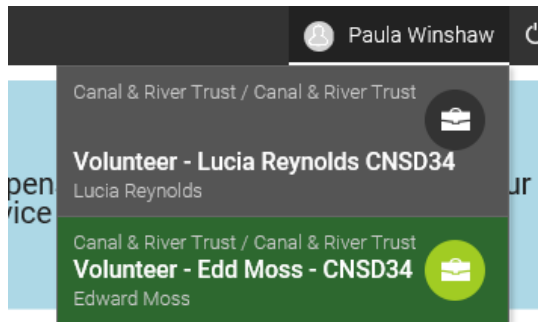
Step 7: How to select / change your approver:

Click on your name – top right of screen. A list of your approvers will appear below.



Click on the approver you need

A box will appear – click Confirm



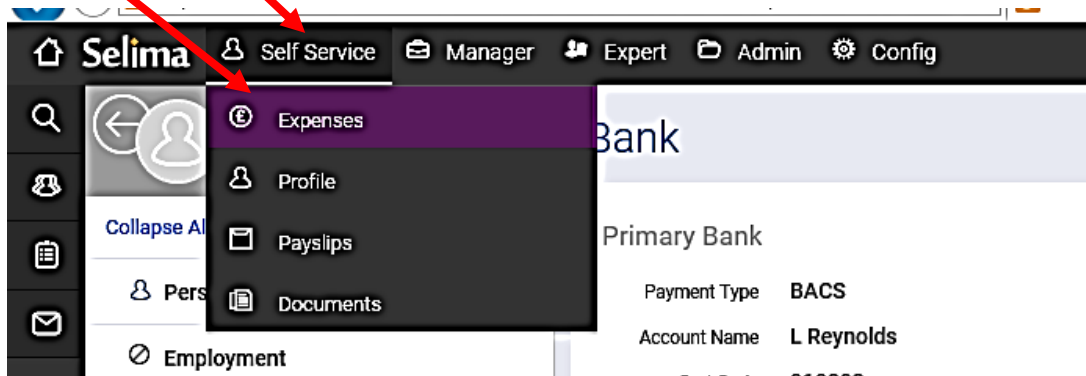
The selected approver is highlighted in green

You can now proceed to entering vehicle details & expense claim details.

Adding vehicle details

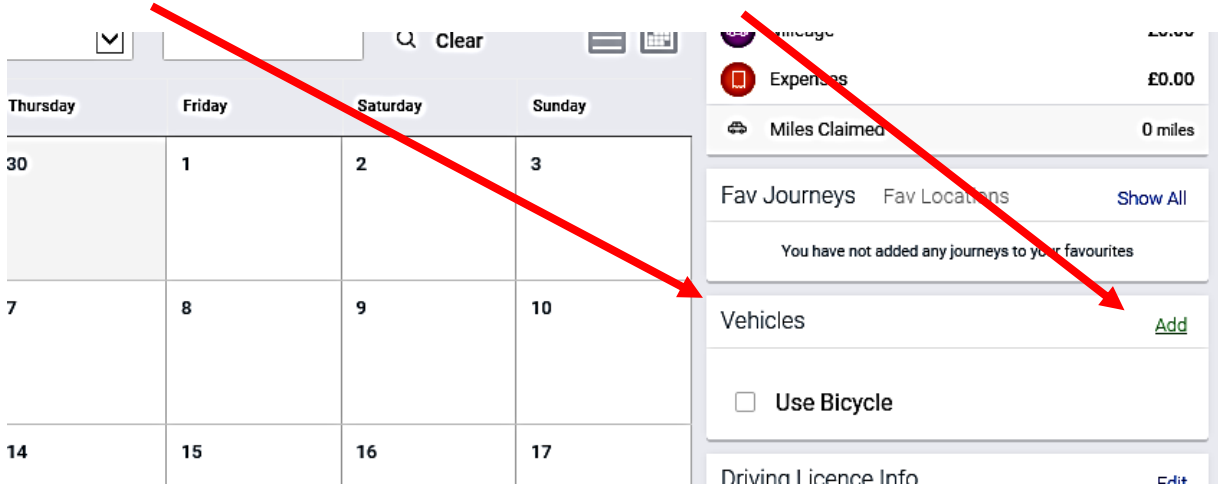
Step 8: Click Self service in the top left again

then click on Expenses



Step 9: The 'Claims' screen will now appear.

Find the Vehicles box on the right & click the green 'add' button next to it.



The below window will appear [boxes will be blank].

A screenshot of the 'Vehicle' registration form. The form has a title 'Vehicle' and a close button 'X'. It contains several input fields and dropdown menus: 'Registration' (with 'CARREG1' entered and highlighted in yellow), 'Make*' (Ford), 'Type*' (Car), 'Engine Size (cc)' (1242), 'Model*' (Fiesta), 'Fuel Type*' (Petrol), 'CO2 (g/km)' (0), and 'Vehicle > 3 Years Old' (Yes). There are also checkboxes for 'Primary Vehicle' (checked) and 'Company Vehicle' (unchecked). At the bottom, there are buttons for 'Cancel', 'Delete', 'Add MOT', 'Add Insurance', and a green 'Save' button.

Step 10: Type your vehicle registration, make, model, fuel type etc –

complete all boxes marked with a red asterisk *

Select your vehicle type & fuel type by clicking the arrows next to the boxes.

Click Save

If you use a **bicycle** to get to your volunteering activity – click the ‘Use bicycle’ box so that you can claim mileage for this mode of transport when you want to.

10	<div>Vehicles Add</div> <div>Primary Vehicle Insurance Expiry</div> <div style="background-color: yellow; padding: 2px; display: inline-block;">CARREG1</div> MOT Expiry
----	---

NB – you will need to enter your vehicle details against each of your approvers.

You are now able to start entering claim details.

Creating a mileage claim

On the Expenses screen, use the calendar to click on the date that you volunteered & want to claim expenses for & click + **Add**

You can select the month and year using the arrows next to these boxes.

December ▾ → 2017 ▾ Description ▾

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	28	29	30	1	2
	5	6	7	8	9
	12	13	14	15	16
	19	20	+ Add	21	22
					23

15 | 16 | 17

21 December 2017

22 | 23 | 24

A little window will appear – click the Mileage button.

This window will appear.....

Mileage

Date* 21/12/201 ? Vehicle* CARREG1 ?

Description* enter brief description of activity/ location/ journey here

Enter journey details

Recall a favourite journey

Select a GPS tracked journey

Unknown Postcode

Mileage Scheme* CRT Mileage Scheme

Journey Miles 0 Miles Claimed 0

If the date is not in this box, type it in [dd/mm/yyyy]

Select your vehicle from the list.

Type in the activity your were doing, where you rdrove from & to and any other information requested by your task manager.

If you know the postocdes you travelled from and to - click 'Enter journey details'

Mileage

Date* 15/03/201 ? Vehicle* CARREG1 ?

Description* Milton Keynes office to the bridges at Old Wolverton on Grand Union & return - for towpath repairs.

Group Test Location Choose.. Add

My Locations (New) Postcode Add

Please enter a location above

Station Square Station Square, Milton Keynes, MK9 1BB

Old Wolverton Road Old Wolverton Road, Milton Keynes, MK12 5NP 3.7 Miles

Return to Start

Journey Miles 3.7 Miles Claimed 3.7

Value of Claim £1.66 CO2 Emissions 0kg Memorise Journey Map

Cancel Save

Type in the starting point postcode then click 'Add' twice

[first half of postcode will be accpeted if full is un known]

Next type the destination postcode & repeat as above

The location will now appear listed. To save the location for future use, click the save icon, type a name for that location & click Save.

Station Square
Station Square, Milton Keynes, MK9 1BB

Old Wolverton Road
Old Wolverton Road, Milton Keynes, MK12 5NP

Return to Start

Journey Miles Miles Claimed 7.5

Value of Claim **£3.38** CO2 Emissions **0kg** Memorise Journey [M](#)

Cancel **Save**

'Return to start' button will now appear. Click it to get the return journey mileage added.

You can save the journey for future claims by clicking 'Memorise journey'.....then give it a name & click save.

You will see that the mileage has now been calculated & added.

Click Save.

If necessary, you can type the miles into this box.

13	14	15	16
20	21 £1.71 3.80 mile...	22	23
27	28	29	30

Your claim will now show in the calendar but it is not yet submitted.

★ Submitting your claim :

In the calendar click the green 'Submit claim' button [top right]

Self Service

Current Claims Claims History

Mileage Add Expense **Submit Claim**

ch 2018 Description

Submit Claim

15/03/2018 Test run £5.40

You are submitting 1 Expenses Total Value £5.40 + 0 Fuel Receipts (€0.00)

Description* Approver* Edward Moss Escalate

Make Default Approver

Cancel **Submit**

Type a description of your claim & click submit

[Claiming other expenses – e.g. car parking fees/ materials](#)

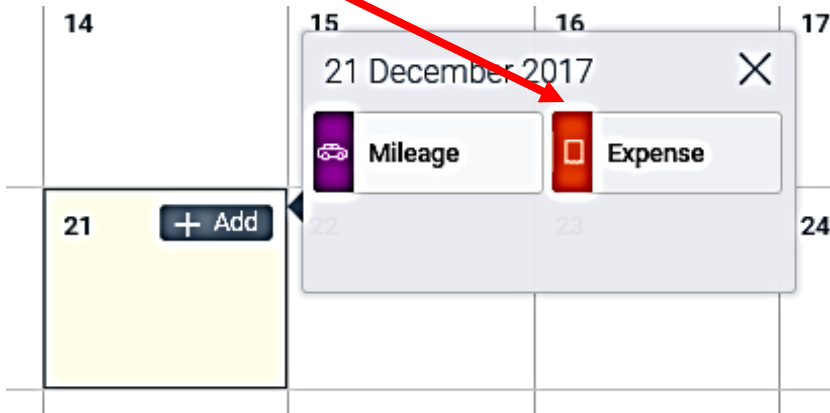
Do not proceed with this step unless you have already entered your bank details!

Select your approver

Click on the date you incurred the expense

Click + **Add**

Click Expense



Select the type of expense and the type of evidence / receipt

Expense

Date* 16/03/2018

Category* Parking & Tolls

Evidence* Receipt with VAT number

Total Amount* £ 3.40

VAT Amount 0.57

Description: Car parking Milton Keynes NCP car park in town centre - for lock keepers' meeting with team leader at Milton Keynes office.

Enter details of the expense incurred – date, activity type etc

Scan your receipt, save it to your computer/ device

Click attach receipt & upload the image of your receipt.

Attach Receipt

Remove

Cancel Delete Save

Enter the amount to be claimed.

Click Save

Favourites & Duplicating a Claim

You can save regular journeys and locations as favourites to speed up future claims but they will not show up on the Expenses home screen until they have been starred.

The screenshot shows two location cards: 'Station Square' (Station Square, Milton Keynes, MK9 1BB) and 'Old Wolverton Road' (Old Wolverton Road, Milton Keynes, MK12 5NP). Below these is a purple 'Return to Start' button. The 'Memorise Journey' form displays 'Journey Miles' as 7.5, 'Miles Claimed' as 7.5, and 'Value of Claim' as £3.38. The 'CO2 Emissions' are 0kg. There is a blue 'Memorise Journey' link, a green 'Save' button, and a grey 'Cancel' button.

Click memorise journey & give it a name.

This section shows 'Miles Travelled' as 1667.4 miles. Below are two tabs: 'Fav Journeys' and 'Fav Locations', with a 'Show All' button. A list of locations is shown: Fradley, Govilon, Hatton, and Home, each with a 'Start Journey' link. At the bottom, there is a 'Driving Licence Info' section with an 'Edit' button.

Then you can select the journey & make it a 'Favourite' by clicking show all

The 'Favourites' section shows a list of 'Favourite Journeys'. One entry is highlighted: 'MK to Wolverton return' (7.50 miles), which has a star icon and a trash icon next to it.

Then click the star icon

This section shows a list of 'Fav Journeys' with columns for the journey name, number of stops, and miles. Each entry has a 'Use' button next to it.

Fav Journeys	Fav Locations	Show All	
Govilon - Fradley	2 stops	180 miles	Use
Home - Lifejacket depo...	2 stops	86.4 miles	Use

Once you have starred some favourite journeys (see above) click the 'Use' button for the ones you wish to replicate. You will still need to add date and description.

How long until I receive my expenses?

If your expenses have been signed off by your approver by Wednesday 12 noon, the payment is usually actioned on Friday and should appear in your bank account by close of business the following Monday. You will receive an email to confirm when they have been approved, provided that you don't remove your email address from the account.

- **Please continue to inform your Task Manager of the number of hours you have volunteered**
- **The personal details you supply to Selima are held securely with them, please let us know of any change of address so we can update our records at the Trust accordingly.**
- **The initial log in details you receive will expire after 3 months if not used.**
- **To get an expenses approver added or removed please contact volunteer@canalrivertrust.org.uk**

For troubleshooting – see next page.....

Thank you for using Selima!

For any further support or feedback please call or email us
0303 040 4040
volunteer@canalrivertrust.org.uk

Troubleshooting 3 common problems

Problem: My username & password won't work / or I have forgotten them

Things to check:

Are you using the correct login page? <https://live.selima.co.uk/CRTSecure/Account/LogOn>

There should be a full stop in the middle of your username, e.g. John.Smith

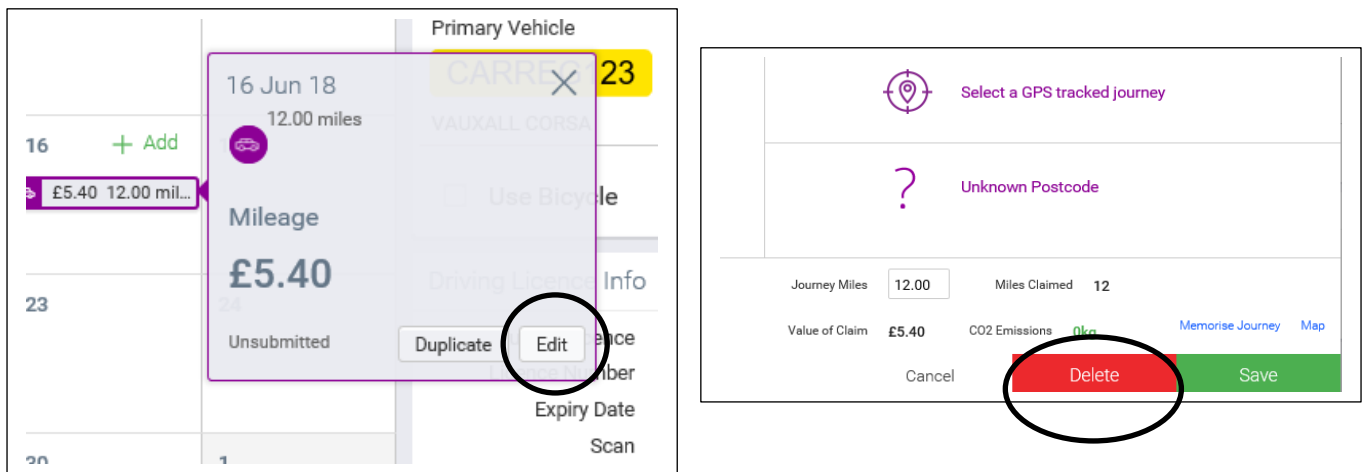
Ensure there are no spaces at the beginning or end of your username & password, type them in manually if copying & pasting doesn't seem to work.

If it still won't work....Request a password re-set by emailing volunteer@canalrivertrust.org.uk

Problem: I have made a mistake & need to delete or edit a claim – 2 scenarios

Solution A – if you have not yet submitted the claim:

Click on the 'Current claims' section of the Expenses screen, click on the item concerned, click Edit, or click Delete accordingly.



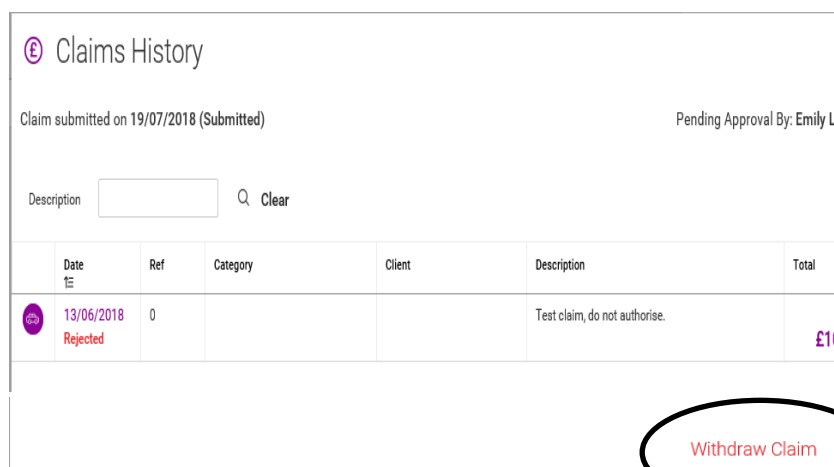
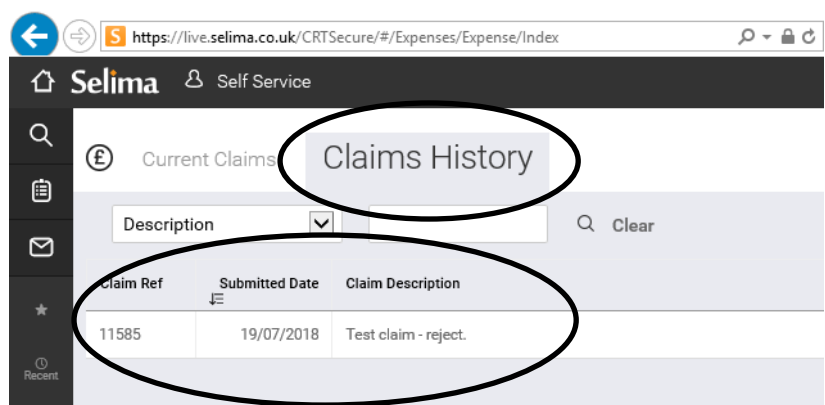
Solution B – if you have already submitted them claim:

Click on the item concerned in the 'Claims history' section of the Expenses screen, click on the claim to open it, or click 'withdraw claim' & it will appear back in the 'current claims' screen where you can edit it [see the below problem for further details].



Problem: My expense claim has been submitted to the wrong approver

There are 3 phases to resolving this issue....



1 - Withdrawing your claim

1. Volunteer should log in to account
2. Select the approver that you sent the claim to
3. Click Self service
4. Click claims history – this will show claims submitted to that particular approver
5. Click on the submitted claim to open the details
6. Click 'Withdraw Claim'
7. Click 'Yes'

Now click back on to the 'Current claims' screen with the calendar on it.....the withdrawn claim will now appear here in the calendar – where it can be edited/ deleted or re-directed as necessary.

N.B. If it doesn't show, or you can't edit the claim, refresh your browser window or log out & back in again.

2 - Getting the correct approver.....

If the approver you need is **not on the list** [refer to page 3 of this document] – then email volunteer@canalrivertrust.org.uk to request either:

a **transfer of approvers** if the person approving your expenses has changed over

or....an **additional approver** if you have more than one volunteer role

Admin will confirm that your request has been actioned.....then you can complete phase 3.....

3 - Submitting your claim to the correct approver...

After being **transferred**....

- select the new approver's name from the drop down menu - the original expense claim will show in the calendar
- click the green 'Submit' button & it will go to the new approver.

After having an **additional approver** put on your account.....

- select the new approver's name from the drop down menu
- enter your vehicle details again
- re-enter your expenses claims on the expenses/ calendar screen & click submit.
- After this, please go back on to the previous approver & delete the claims that you withdrew.