EASY Expenses System

How do I......?

1. Access the system?

To access EASY, you will need:

plus, a Web Browser
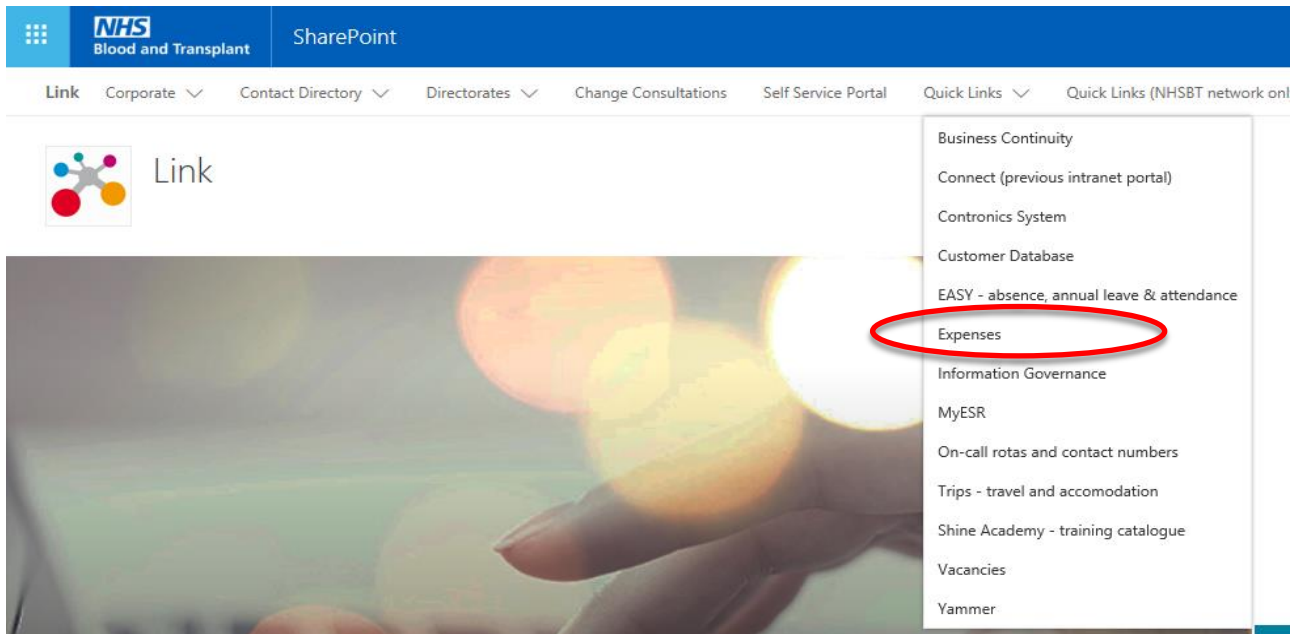
Google Chrome

IE version 8+
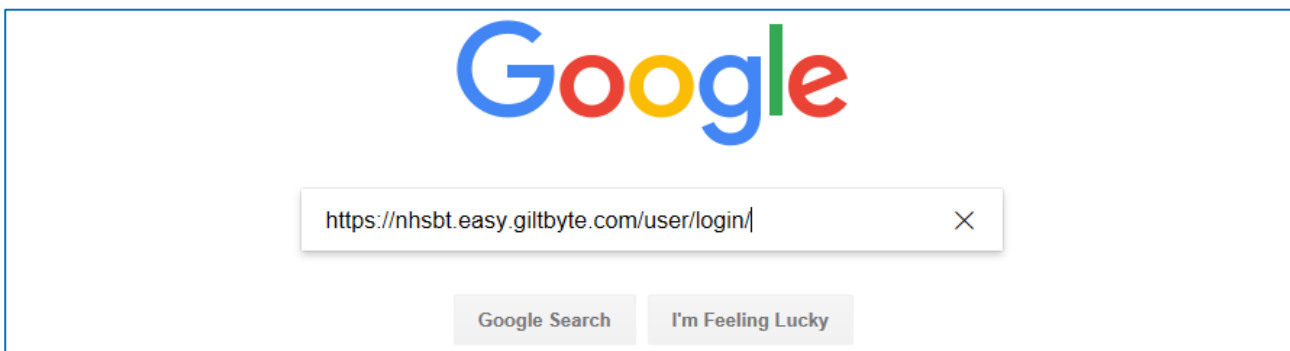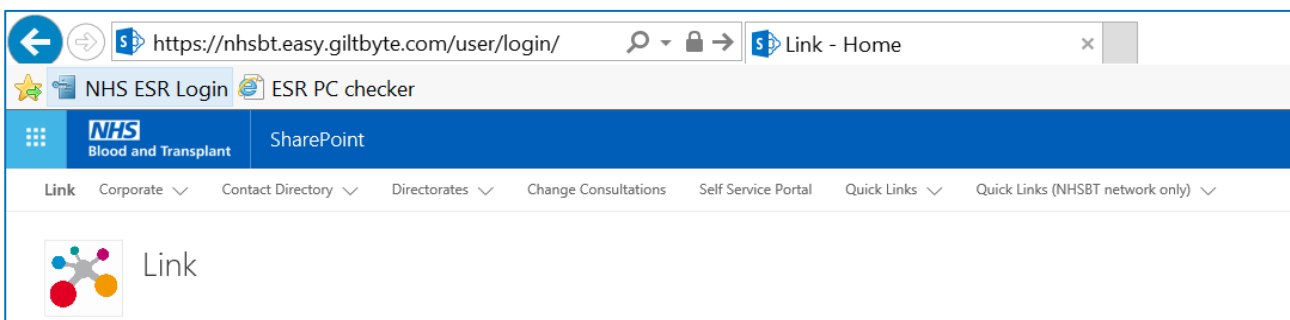
Safari

Opera

Mozilla Firefox

2. Get to the EASY system?

Click on Quick Links from NHSBT Link page, then click on Expenses.

or, open a web browser and enter the web address

3.   **Reset my password** – I've forgotten my password?

Click on the Forgotten your login? link on the login screen.

Enter your Employee Number, Username or NHSBT E-mail address.

An email will have been sent to you with a link that will take you to the screen to create a new password.

4.   **Reset my security word?** - I've forgotten my security word

You will need to raise a query with HR Direct who can organise re-setting the system, so you can re-create a new security word.

5.   **Contact the System Administrator?**

If you look at the top right of the login page, you will see Help and Support. If you click on this, you will see the contact details for your System Administrator.

6.   Add a favorite place?

Click on the Favourite Places link in the Self Service menu. Complete the screen with your favourite place then click the Add button.

▾ Favorite Places	
No favorite places found	
▾ **Add New Place**	
Title:	
Location type:	Location ⬍
Location:	🔍 ✖
	Add

7.   Find the assignment number I want to claim against – I have more than one assignment?

Click on the drop-down box to select the assignment in which you incurred the expenses that you wish to claim reimbursement for.

Expenses for   Forename Surname (12345678): Job details (2 Claims)   ⟶ | ∨

8.   Find the expense section?

Go to the Self-Service heading on the menu bar and click on Expenses.

▾ **Self Service**
🕐 Timesheets
▾ | 💷 Expenses ⟵

9.   Input my expense items?

Click on **Add/Edit** to access the claim screen

▸ **Unsubmitted Claims (0)**   **Add/Edit**

10. See expense items?

Under the Mileage Claims header click on the Expense Type (Vehicle) drop-down box to select mileage related expense items

Under the Expense type header click on the Other Claims drop-down box for non-mileage expense items.

11. Select a reason for my journey?

Click on the drop-down box under Reason Extra Details in Mileage claims and Other claims to select the reason for your journey.

12. Select a starting point for my journey?

Click on the drop-down boxes under Journey – Start and End to select the start and end of your journey.

Base and Home will pre-populate information fro⟨...⟩⟨e⟩

For **Location** use the 🔍 magnifying glass icon to search for location.

For **UK Post Code** type in the postcode into the box.

For **Favourite Place** use the drop-down to select saved favourite places.

For **Odometer Reading** type in your reading into the box (if required).

13. See how my mileage is calculated?

Your mileage is calculated using Google Maps. Click on the World icon in your mileage claim screen - it will display a map of the route that has been used to calculate the mileage.

14. Add a comment?

Where available - click on the speech bubble icon.

And add a note for your manager.

15. Add a new line?

Select the green plus ➕ icon and a blank row is added above the current row to enable you to enter the details of a new journey.

16. Add a journey step?

Select the green up arrow ⬆ icon to pre-fill a new row with some values from the current row as a continuation of the current journey.
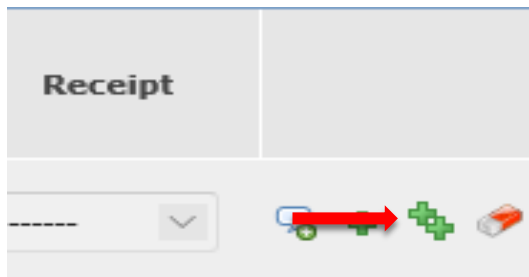

17. Enter a return journey?

Select the green curled arrow ↩ icon to complete a new row with the return journey details.

18. Copy an expense item?

Select the double green plus 🟢 icon to pre-fill a new row with most of the values from the current row.

Example: excess travel – enter first day excess travel details - use the 🟢 icon to replicate the expense item in a new line and then change the date.

19. View my previous claims?

In Expenses Status screen click on **View Archived Claims** button (top right). Your latest claims will be displayed. If the dates you are looking for are not displayed, you can enter the dates you want

15 Jan 2015 🔲 **and** **12 May 2016** 🔲 **Refresh**   and then click Refresh button.