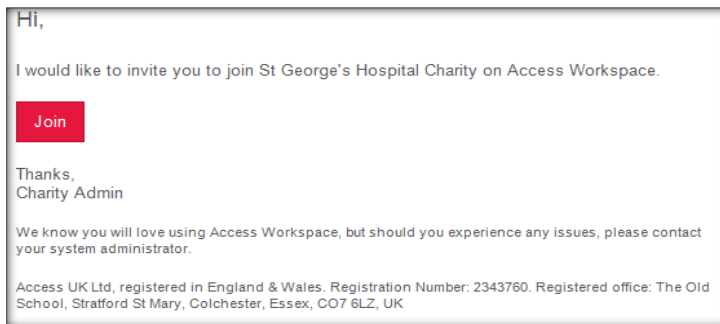


Access Workspace Expense Module

- ✚ Claimant has to send an email to Charity.Admin@stgeorges.nhs.uk to request finance to setup an account in Access Workspace Expense Module if they have not received an invitation.

Mandatory Information in the Email is: Email ID, Account Details (Sort Code, Account No, Account Name and Name of the Bank)

- ✚ Once Charity Staff has setup your account, you will get an email invitation from Charity as like as below.



Usage Manual

- ✚ Initial Setup
- ✚ Submit a Claim
- ✚ Approve the Claim

Initial Setup

Two different ways you can use the expense module to submit claims.

1. Mobile App
2. Internet

Mobile App

Use the below link to download the mobile App or search by **“Access Workspace”** in mobile app stores.

Android (Google Play): <http://goo.gl/j24wAb>

Apple (iTunes): <https://goo.gl/0023vs>

Windows Phone (Store): <https://goo.gl/4kSI6Z>

Find the below Image of Access workspace Mobile App.

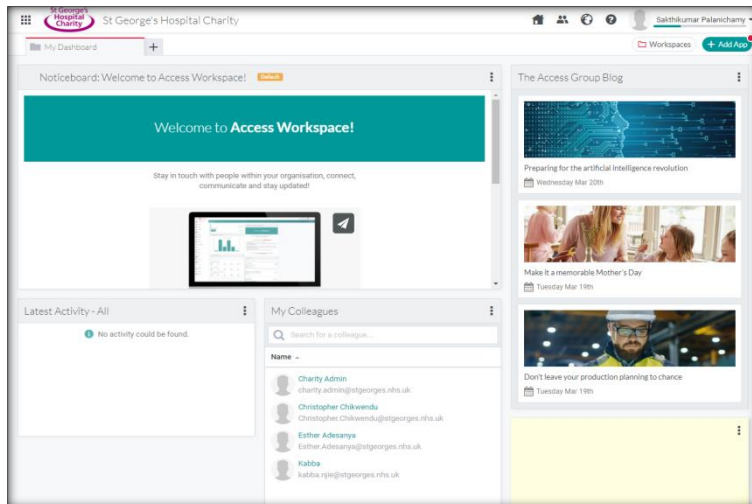


Internet


To login, Please use the link: <https://go.accessacloud.com/login> or <https://identity.accessacloud.com/auth/signin>

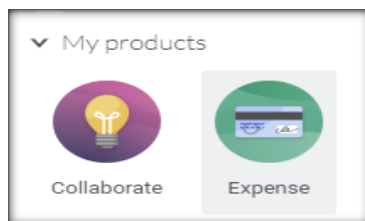
with username (Email ID) and password for your account.


After login, you will able to see the below Dashboard.

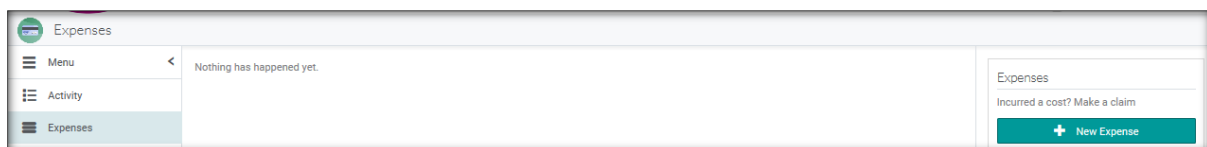


Submit Claim

1. Click on My Products  icon on top left of the Home page.
2. Click Expense option to submit the claim.



3. Click the icon  on right hand of the page.



4. Fill the necessary Information on the below form, upload the receipts and Save the Form

5. Select the claim and Submit on the right hand side of the page.

| <input checked="" type="checkbox"/> | Date | Expense Type | Description | Amount |
|-------------------------------------|-------------|---------------|--------------------------|--------|
| <input checked="" type="checkbox"/> | 22 Mar 2019 | Accommodation | To Attend the Conference | £50.00 |

Displaying items 1 - 1 of 1

Expenses

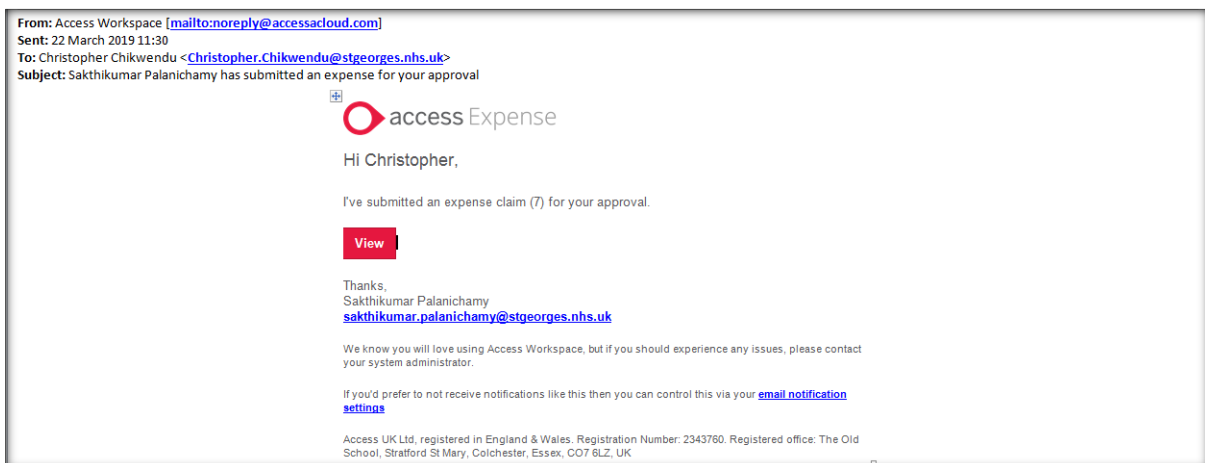
Incurred a cost? Make a claim

[+ New Expense](#)

1 item(s) selected with a total value of £50.00

- Edit
- Submit
- Delete
- Duplicate
- Set Information

6. After claim has been submitted, the Access Expense Workspace will send an automatic email to approver.



7. As a Claimant, check the process of your claim.

Click on the **History** → **Expenses** on left side ribbon option. You will see all the claims which are all submitted by you.

Click on any claim (**for ex. 7 [Claim No]**) and Check approval stage and approvers details.

| No. | Date | Description | Status | Amount |
|-----|-------------|-------------|-------------------|--------|
| 6 | 22 Mar 2019 | test claim | Awaiting Approval | £50.00 |
| 7 | 22 Mar 2019 | test claim | Awaiting Approval | £50.00 |

| Date | Expense Type | Description | Status | Amount |
|-------------|---------------|----------------------|-------------------|--------|
| 22 Mar 2019 | Accommodation | Duplicate test claim | Awaiting Approval | £50.00 |

| Date | Expense Type | Quantity | Rate | Net |
|-------------|---------------|----------|-------|--------|
| 22 Mar 2019 | Accommodation | 0.00 | £0.00 | £50.00 |

| Description | VAT Rate | VAT | Gross |
|-------------|----------|-------|--------|
| test claim | 0.00% | £0.00 | £50.00 |

| Business Use | Number of Nights |
|--------------|------------------|
| test claim | 1.00 |

| Fund | Task |
|-------------------------|-------------|
| Neurosciences Dept Fund | Expenditure |

| Approval Stage | Approvers |
|----------------|-----------------------|
| Fund | Christopher Chikwendu |

Approve Claim

Go to Approval option on the left hand side, it will display all the claims waiting for your approval. You can select and approve the claim as like as below screenshot.

| No. | Claimant | Date | Description | Amount |
|-----|-------------------------|-------------|-------------|---------|
| 3 | Christopher Chikwendu | 20 Mar 2019 | | £300.00 |
| 6 | Sakthikumar Palanichamy | 22 Mar 2019 | test claim | £50.00 |
| 7 | Sakthikumar Palanichamy | 22 Mar 2019 | test claim | £50.00 |

After Fund approval, it will go to Finance Validation.

| No. | Date | Description | Status | Amount |
|-----|-------------|-------------|-------------------|--------|
| 6 | 22 Mar 2019 | test claim | Awaiting Approval | £50.00 |
| 7 | 22 Mar 2019 | test claim | Awaiting Approval | £50.00 |

| Date | Expense Type | Description | Status | Amount |
|-------------|---------------|----------------------|-------------------|--------|
| 22 Mar 2019 | Accommodation | Duplicate test claim | Awaiting Approval | £50.00 |

| Date | Expense Type | Quantity | Rate | Net |
|-------------|---------------|----------|-------|--------|
| 22 Mar 2019 | Accommodation | 0.00 | £0.00 | £50.00 |

| Description | VAT Rate | VAT | Gross |
|-------------|----------|-------|--------|
| test claim | 0.00% | £0.00 | £50.00 |

| Business Use | Number of Nights |
|--------------|------------------|
| test claim | 1.00 |

| Fund | Task |
|-------------------------|-------------|
| Neurosciences Dept Fund | Expenditure |

| Approval Stage | Approvers |
|--------------------|--|
| Finance Validation | Christopher Chikwendu, Esther Adesanya |

After Finance Validation, it will go for Final Approval.

| No. | Date | Description | Status | Amount |
|-----|-------------|-------------|-------------------|--------|
| 6 | 22 Mar 2019 | test claim | Awaiting Approval | £50.00 |

| Date | Expense Type | Description | Status | Amount |
|-------------|---------------|--------------------------|-------------------|--------|
| 22 Mar 2019 | Accommodation | To Attend the Conference | Awaiting Approval | £50.00 |

| Date | Expense Type | Quantity | Rate | Net |
|-------------|---------------|----------|-------|--------|
| 22 Mar 2019 | Accommodation | 0.00 | £0.00 | £50.00 |

| Description | VAT Rate | VAT | Gross |
|--------------------------|----------|-------|--------|
| To Attend the Conference | 0.00% | £0.00 | £50.00 |

| Business Use | Number of Nights |
|--------------------------|------------------|
| Importance of Conference | 1.00 |

| Fund | Task |
|-------------------------|-------------|
| Neurosciences Dept Fund | Expenditure |

Approval Stage: Final Approval
 Approver: Sakthikumar Palanichamy

Once Final Approval, your payment will be process by bac's to your account.

| No. | Date | Description | Status | Amount |
|-----|-------------|-------------|-------------------|--------|
| 6 | 22 Mar 2019 | test claim | Approved | £50.00 |
| 7 | 22 Mar 2019 | test claim | Awaiting Approval | £50.00 |

Note: Approver can reject the claims at any stage and return back to claimant to submit the same claim with requested information by approver.