Step by Step Guide to Creating a Claim on Selenity Expenses

Important information:

The self-registration process **must** be completed before you can make a claim. Please see the guidance on self-registration process.

Once registered you will also need to add a bank account via the My Details/Bank Account page before you can enter a claim – see the Self Registration guide for more details.

**PANEL MEMBERS**: if you are a panel member ideally you should claim from your employer and ask them to invoice Health Education England for reimbursement. Selenity should only be used if this is not possible. If your employer has refused to reimburse you directly, please attach evidence of this to your claim.

All claimants should select the venue where their interview/panel is held, not the one where they live or work (unless they are the same).

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**ALL EXPENSES CLAIMED NEED A RECEIPT EXCEPT INCIDENTAL AND MILEAGE/DETOUR MILEAGE**

The examples of expense items shown in this guide are for a Hotel and Train Ticket, but the method is the same for all items.

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*Remember to submit your claim within 28 days of incurring the expense*
Logging in and entering your General Details

This is the link you will need (do not use search engine results as they may show a different organisation’s version of the same software):

https://heenon.sel-expenses.com

If you experience any difficulties with the operation of the system, please try using it in a different browser before querying with the Expenses Team.

Enter the company ID of HEENON, your user name and password and then click on the Logon button.

Remember to submit your claim within 28 days of incurring the expense
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This will take you to the following screen. Click on “Add New Expenses”:

The following screen appears.

Enter the date of your claim, this must match the date on the receipt or date of travel for mileage and detour mileage.
Click the down arrow in the Venue – Claimant Type panel on the left and select from the drop-down list **SEE THE GREEN CIRCLE IN THE SCREEN SHOT BELOW. N.B. YOU MUST DO THIS FIRST.** Then click in the 2nd Venue-Claimant Type and the same information will appear, click in this text.

For Foundation claimants only, there are 4 options to choose from:

- Academic Foundation Programme (AFP) – Applicant
- Academic Foundation Programme (AFP) – Panel Member
- F2 Stand-alone Recruitment – Applicant
- F2 Stand-alone Recruitment – Panel Member

Although a large list, it will appear in alphabetical order and be easy to sort through.

**ALL CLAIMANTS SHOULD SELECT THE VENUE WHERE THEIR INTERVIEW/PANEL IS HELD, NOT THE ONE WHERE THEY LIVE OR WORK (UNLESS THEY ARE THE SAME).**
Click on the Speciality drop down arrow and select from the alphabetical list:

Provide any additional information which may be helpful for the claim approver in the “Other Details” box. This will also be of help to you if making several claims:

You can add expense items by selecting different check boxes on the left – in this case each selection will appear in the Specific Details section, ready to be filled in. You can also add them as detailed in the following pages.

The examples shown are for Hotel and Train Ticket, but the overall principles are the same for all items (receipts not needed for mileage, mileage detour and incidental expenses).

Remember to submit your claim within 28 days of incurring the expense
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All expenses claimed require a receipt (except incidental, mileage and detour mileage), click in the circle to the left of the Yes box. Enter the number of nights stay and the total from the receipt:

**Add Expense**

**General Details**
- Date: 20/11/2019
- Country: United Kingdom
- Currency: Pound Sterling
- Venue/Claimant Type: London - Paediatric Cardiology
- Other Details: 

**Specific Details**
- Expense Category: Accommodation
- Expense Item: Hotel Accommodation (London)
- Receipt must be uploaded
- Number of Nights: 1
- Do you have a receipt? Yes  No
- Total (Gross): £45.00

Click on Save.

The accommodation expense is complete and the screen below is created. The system has created the claim name which is the unique claim reference.

Add the accommodation receipt, click on the scroll icon.

The following screen appears. Hover over in the grey panel (to the left) and the scroll icon appears as shown.

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Adding a further expense item (Train Ticket)

To add another expense, click on “New Expense” from the list. This screen opens.

Select the category from the drop-down arrow and select the item from the drop-down arrow in the second panel.

Remember to submit your claim within 28 days of incurring the expense.
Click in the circle to the left of the Yes box. Then enter the value of the train ticket.

Save the details of the expense.

The claim now shows two expense items as shown below:

The train receipt now needs to be attached. Click on the symbol in the Train Ticket row, it will appear in the grey area, where the red circle is shown below.

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This will open a window showing your drives/folders on your device. Select your saved receipt. The receipt is now uploaded (in this example a word document).

Click on Save
Completing and submitting your claim

Your claim will not be checked, approved & paid until you submit it.

Click on **Submit Claim** when your expenses claim is complete:

The following message then appears and the claim number and description is shown:

Click on the **Save** button and the Declaration window appears, please read and then click on the 'I Accept' button.

*Remember to submit your claim within 28 days of incurring the expense*
After your claim has been submitted

Once submitted, your claim will move from the current claim page to your submitted claims page (Home/My Claims):

Clicking into the submitted claims page will bring up a list of claims still waiting for payment and currently with the HEE checkers & approvers. You can click into any of these to view the claim history for information about what is happening with your claim:

The claims history screen can be seen above the list of your expense items:

If your checkers and approvers do not have any questions or issues with your claim, you will receive an email once the claim has been approved for payment in the system. We make a number of BACs payments a week, so you should receive payment into your account in no more than 7 working days after the notification email. Once a claim has been paid it will appear in your ‘Previous Claims’ page for future reference.

Important

If an expense item is disputed and returned, you will receive an e-mail notification explaining what action you need to take. If you have not corrected or deleted an item before 28 days from the date the claim was rejected, the item will be deleted from your claim. This will ensure the remainder of your claim can progress to be paid. If the whole of your claim is incorrect, it will be unsubmitted and return to your ‘Current Claims’ page – again you will receive an email and will need to amend and resubmit if applicable.

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