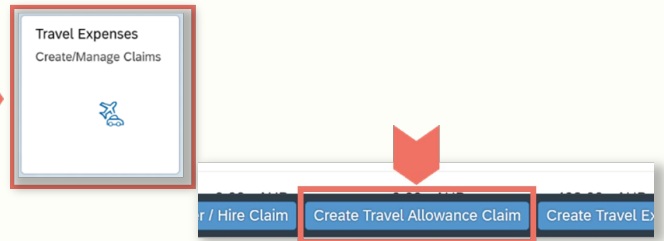


# Create a travel allowance claim - staff

## 1 Create travel allowance claim

To create and manage travel allowance claims:

- Select the Travel Expenses tile
- Select the Create Travel Allowance Claim button.



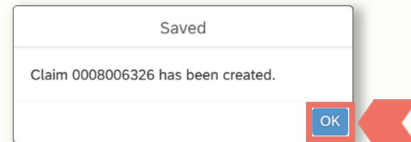
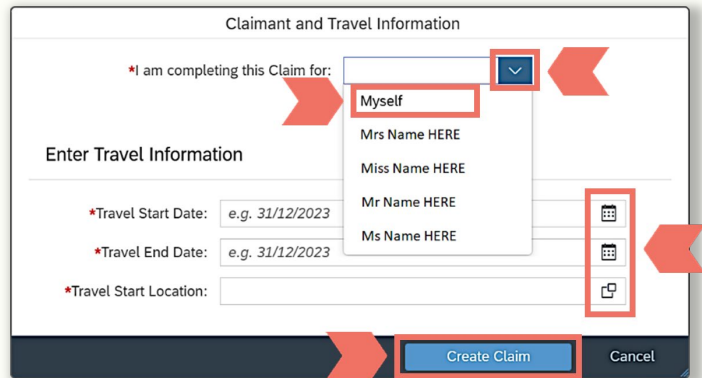
## 2 Who is the claim for?

From the Claimant and Travel Information screen:

- Select the claimant from the dropdown list
- Select both the Travel Start Date and Travel End Date using the calendar icon
- The Travel Start Location will default to your workbase. Update this if required by selecting the icon and choose the location from the dropdown list
- Click on the Create Claim button.

Once the claim is created:

- Select the OK button.



## 3 Edit the trip leg details

To edit the details of the first travel leg:

- Select the Pen icon.

This displays the Edit Travel Leg screen.

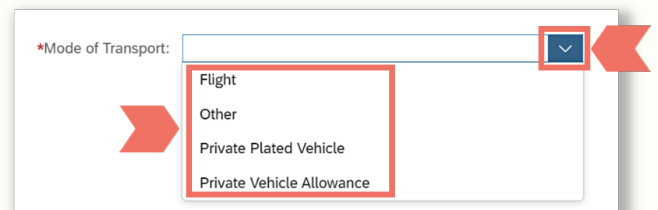
- Select the Mode of Transport using the dropdown menu.

The Mode of Transport determines which fields appear on the Edit Travel Leg screen.

In this guide, the example mode used is 'Flight'.

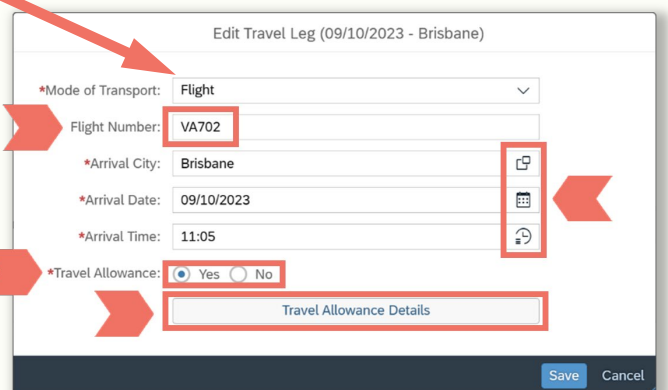
The screenshot shows a table with the following data:

	Date	Leg Number	Time	Mode Of Transport
	09/10/2023	0000	00:00	
	13/10/2023	0000	00:00	



### Example – flight trip leg

- Enter the Flight Number, if known
- Enter the Arrival City, Arrival Date and Arrival Time using the corresponding icons in each field
- Select whether Travel Allowance is being claimed for this leg by selecting Yes or No.
  - If Yes, proceed through step 3
  - If No, select Save and proceed to step 4.



### Notes:

1. Date and time may be entered manually using formats of dd/mm/yyyy (e.g. 27/10/23) and 24-hour (e.g. 14:54), respectively.
2. Mandatory fields are labelled with a red asterisk (\*).

# Create a travel allowance claim - staff

## 3 Edit the trip leg details - continued

If Travel Allowance is being claimed for this leg of travel:

- Click on the Travel Allowance Details button
- Select **Add Purpose**
- Select the trip leg's dominant purpose from the Description dropdown list
- Use the Travel Allowance Dates selector to select each of the claimed dates
- Select the Location Stayed using the icon in this field and choose the location from the dropdown list
- Select the Type of Accommodation.

\*Travel Allowance:  Yes  No

Travel Allowance Details

Edit Travel Leg (09/10/2023 - Brisbane)

Dominant Purpose (0)

Description: Official

Travel Allowance Dates: 09/10/2023, 10/10/2023, 11/10/2023, 12/10/2023

No. of nights claiming at this location: 4

Official

Training

MoPS Act Representative Group

Add Purpose

Location Stayed: Brisbane

Type of Accommodation:  Commercial  Non-Commercial  Canberra

**Note:** Type of Accommodation defaults to Canberra if the Location Stayed is selected as Canberra. In this case no attachment is required.

If you are attaching a Tax Invoice/Receipt:

- Select the Tax Invoice/Receipt Attached checkbox
- Click on the Plus (+) icon
- Locate and attach the Invoice/Receipt document.

Tax Invoice/Receipt Attached:

Available on Request (AOR):

The maximum size per attachment is 5MB. Only file types \*.doc, \*.docx, \*.xls, \*.xlsx, \*.gif, \*.jpg, \*.jpeg, \*.tif and \*.pdf can be attached.

Attachments (1)

Accommodation Invoice.pdf  
36.2 KB

Save Cancel

If supporting documents are not available at the time of editing the trip leg details:

- Select the Available on Request (AOR) checkbox.

When finished:

- Select the Save button.

The Claimant and Travel Information screen is displayed.

- Select the Pen icon to add details for other legs of the trip using the process above
- Select Save when finished.

	Date	Leg Number
	09/10/2023	1
	13/10/2023	2

Print Claim Save Copy

# Create a travel allowance claim - staff

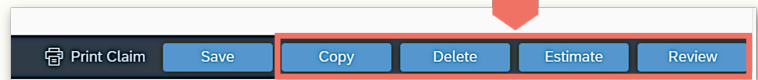
## 4 Additional claim options

In addition to the Save function, the other claim options are:

- Copy – if you are processing a repetitive claim
- Delete – to cancel a claim prior to submission
- Estimate – to view the expected travel allowance
- Review – to view and edit a claim prior to sending for certification.

To add trip legs to your Travel Allowance Claim:

- Select the Add Travel Leg button
- Add trip information as shown in step 3.

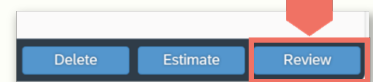


Allowance	Vehicle Allowance
4.00 AUD	0.00 AUD
0.00 AUD	0.00 AUD
4.00 AUD	0.00 AUD

## 5 Review and submit claim

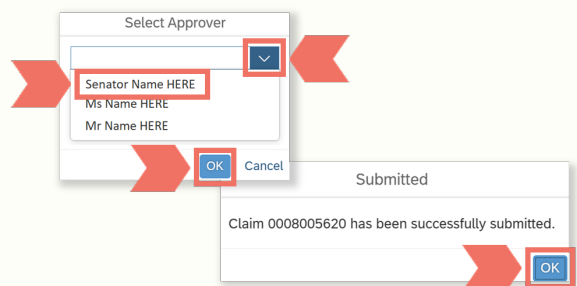
To submit claim for certification:

- Select Review
- Scroll to the bottom of the Review Screen
- Read and accept the Terms and Conditions by ticking the acceptance statement field.



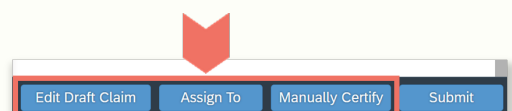
- Select Submit
- Choose from the dropdown list the person who will certify the claim
- Select OK to close the confirmation notice.

You will be returned to the Travel Claims screen.



From the Terms and Conditions screen, a MOP(S) Act employee can also select:

- Edit Draft Claim — to edit a claim
- Assign To — after creating a claim for others, assign the claim to the claimant for them to submit for certification
- Manually Certify – to physically sign, scan and upload a certification document.



Following certification of your claim, IPEA will review and verify your claim in line with our published [Service Level Standards](#). Payments will be received in 2-3 working days following verification.