

Configure Fixed Excess Mileage

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Permissions

You will require an Access Role with the following permissions:

- Employees
- Vehicle Journey Rate Categories
- Expense Items

When an employee is relocated from one work address to another work address, they may be entitled to claim for the excess mileage which they undertake to commute from their home to their new work address. Assure Expenses allows you to set a fixed excess mileage figure per employee, which they are able to claim for by using the 'Fixed Excess Mileage' expense item.

In order to use fixed excess mileage within your system, you will be required to configure a few different areas of Assure Expenses. These steps are listed below:

Step 1 - Configure the Vehicle Journey Rate Category (Optional)

If your organisation has a set rate for excess mileage, you can configure that rate within a 'Vehicle Journey Rate Category' and set it against the 'Fixed Excess Mileage' expense item. This will ensure that any employees who claim the 'Fixed Excess Mileage' expense item will receive that rate.

Alternatively, you can skip this step if you would prefer that claimants continue using their existing Vehicle Journey Rate Categories.

For information on how to create a vehicle journey rate, view [Manage Vehicle Journey Rate Categories](#).

Step 2 - Configure the Item Role

Creating an Item Role specifically for employees who are permitted to claim excess mileage will allow you to have greater control over who has access to claim and for how long. At this point, you will only need to create the Item Role. This will be assigned to the appropriate claimants in 'Step 3'.

For information on how to create an item role, view [Manage Item Roles](#).

Step 3 - Set the Excess Mileage Per Employee

1. Navigate from the **Home** page to **Administrative Settings | User Management | Employees**.

Employees

Search Options

Enter surname of employee (or lead characters) Username

Role

Signoff Group

Default Department

Default Costcode

2. Search for the employee and click .

3. Click the **Work** tab and then locate the 'Excess Mileage' field. Enter the number of excess miles an employee is permitted to claim for each applicable journey.

Employee: Alex

Employee Details

General Details **Permissions** **Work** **Personal** **Claims** **Notifications** **Authoriser Level**

Employment Information

Credit Account  Payroll Number

Position National Insurance Number

Hire Date  Termination Date 

Employee Number

Primary Country

Primary Currency

Line Manager 

Starting Mileage Starting Mileage Date 

Current Mileage **Excess Mileage** 

4. Click the **Claims** tab and assign the **Item Role** created in **Step 2**.

Employee: Alex
Employee Details

General Details | Permissions | Work | Personal | **Claims** | Notifications | Authoriser Level

Claim Signoff

Signoff Group: Manager

Signoff Group (Credit Card): [None]

Signoff Group (Purchase Card): [None]

Signoff Group (Advances): AlexAdvancesSignoff

Item Roles

[Add Item Role](#)

Item Role	Start Date	End Date
Entertainment		

Note: You can use the 'Start Date' and 'End Date' fields on an Item Role to limit a claimant to only claiming excess mileage for a set period.

Step 4 - Create the 'Fixed Excess Mileage' Expense Item

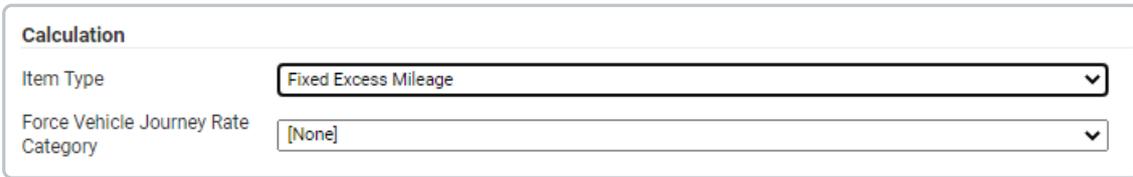
1. Navigate from the **Home** page to **Administrative Settings | Base Information | Expense Items**.

1 2 3 4 5 > >> filter

<input type="checkbox"/>	Expense Category ▲	Expense Item	Expense Item Description
<input checked="" type="checkbox"/>	1 Of Each	StandardItem	
<input type="checkbox"/>	1 Of Each	Pencer Per Mile	
<input type="checkbox"/>	1 Of Each	Meal	
<input type="checkbox"/>	1 Of Each	Daily Allowance	
<input type="checkbox"/>	1 Of Each	Fuel Receipt	
<input type="checkbox"/>	1 Of Each	Mileage (Fuel Receipt)	
<input type="checkbox"/>	1 Of Each	Fixed Allowance	
<input type="checkbox"/>	1 Of Each	Fuel Card Mileage	
<input type="checkbox"/>	1 Of Each	Item Reimburse	
<input type="checkbox"/>	1 Of Each	Fixed Excess Mileage	
<input type="checkbox"/>	1 Of Each	Fixed Mileage Deduction	
<input type="checkbox"/>	1 Of Each	Hotel std item	
<input type="checkbox"/>	1 Of Each	ToAndFrom	

2. Create or edit the expense item that you want to use for 'Fixed Excess Mileage'. For more information about creating an expense item, view [Create an Expense Item](#).

3. Set the Item Type field to **Fixed Excess Mileage**.



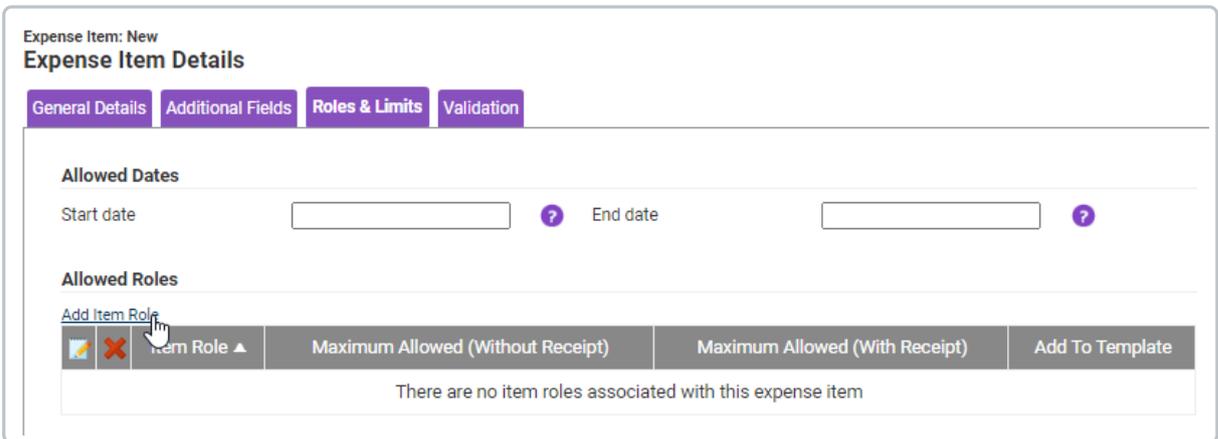
Calculation

Item Type

Force Vehicle Journey Rate Category

Optional: Set the Vehicle Journey Rate Category that you created in **Step 1**, otherwise, leave this blank.

4. Navigate to the 'Roles & Limits' tab. Click **Add Item Role** and select the Item Role created in **Step 2**. For more information, view [Manage Item Roles](#).



Expense Item: New
Expense Item Details

General Details Additional Fields **Roles & Limits** Validation

Allowed Dates

Start date ? End date ?

Allowed Roles

[Add Item Role](#)

Item Role ▲	Maximum Allowed (Without Receipt)	Maximum Allowed (With Receipt)	Add To Template
There are no item roles associated with this expense item			

5. Click **Save** to store the changes and return to the Expense Items menu.

Step 5 - Subscribe to Email Notifications for Change of Address (Optional)

To ensure that the 'Excess Mileage' value reflects the correct distance, you can subscribe to email notifications which will inform you when a home or work address is added, edited or deleted for a claimant. You can configure this for each employee who should be notified of address changes. For more information, view [Add an Employee](#).

Employee: Alex
Employee Details

- General Details
- Permissions
- Work
- Personal
- Claims
- Notifications**
- Authoriser Level

Notifications

Standard	<input type="checkbox"/>	Support Tickets	<input type="checkbox"/>
Audit Log Cleared	<input type="checkbox"/>	 Excess Mileage	<input checked="" type="checkbox"/> 

Note: You will only be notified for claimants who have an 'Excess Mileage' value set on their employee record.