Add Vehicle Documentation
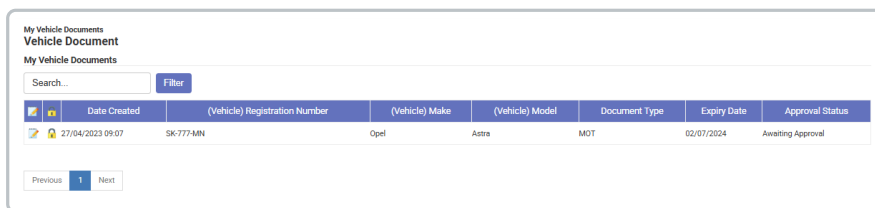
Permissions

You will require the following permissions:

- The relevant item role that allows you to claim these expense types.

> **Note**: To edit vehicle documentation, navigate from the **Home** page to **Driver Compliance | My Driver Documents | My Vehicle Documents**. On the required document, click 📝 and input your new information. When you are satisfied, click **Save**.
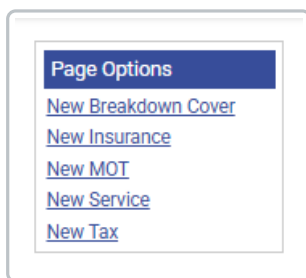
Breakdown Cover

1. Navigate from the **Home** Page to **Driver Compliance | My Driver Documents | My Vehicle Documents**. This will display a list of documents for each of your vehicles registered within Assure Expenses.

2. Click **New Breakdown Cover** in the **Page Options** menu.

3. Complete the Claimant Breakdown Cover Form that opens.

4. Use the **Vehicle** drop-down list to select the vehicle that the new document is related to. The vehicle details will automatically populate.

5. Complete the following fields:

Feature	Description
Start date*	The start date of the vehicle breakdown cover.
Expiry date*	The end date of the vehicle breakdown cover.
Provider	Enter the company who provides the cover.
Document	Click browse to locate the breakdown cover document you wish to upload.

6. Click **Save**.

> **Note:** If you receive the following error when saving, 'Selected file type is not currently supported', the file type of the uploaded document has not been configured by your organisation. You will have to change the format of your file and try again in order to upload your documentation.
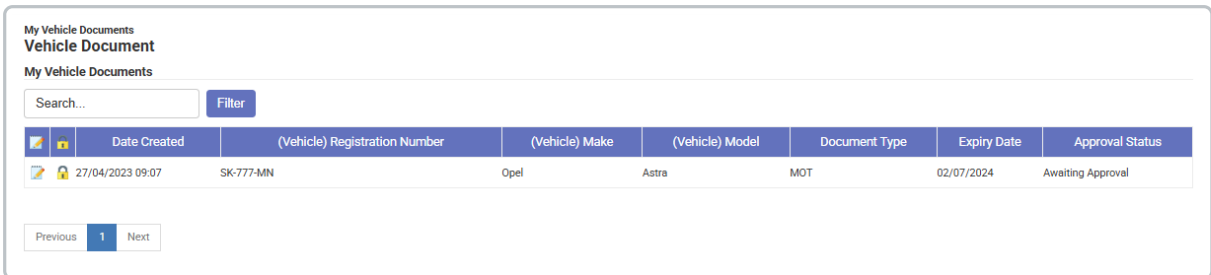>
> Your administrator determines which file types can be uploaded within Assure Expenses. If you want to find out which file types are allowed, contact your administrator.

> **Note:** If an approver fails one of your pending Duty of Care documents, you will receive a system generated email prompting you to take action.

> **Additional Information:** If you edit and then save one of your duty of care documents after it has already been approved, the current document review is invalidated and an email is sent to your approver requesting a new review. You will be unable to claim mileage until the review has been completed and marked as "Reviewed - OK".
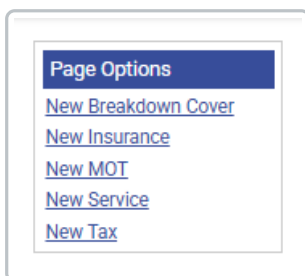
Insurance

1. Navigate from the **Home** Page to **Driver Compliance | My Driver Documents | My Vehicle Documents**. This will display a list of documents for each of your vehicles registered within Assure Expenses.

2. Click **New Insurance** in the **Page Options** menu.

3. Click **Save**. This will direct you to the Claimant Insurance Form.

New Vehicle Insurance Document
Claimant Insurance Form

General Details

Vehicle

Vehicle*	[None] ⌄	Vehicle Engine Type	?
Make		Model	

Overview

Please provide the information required in the boxes below and attach a copy of your supporting documentation.

Start date*	📅	**Expiry date***	📅
Provider		**Cover type***	[None] ⌄
Policy number*		**Is class 1 business travel included?***	[None] ⌄
Is commuter travel included?	No ⌄		
Document	browse ...		

Review

Status*	Awaiting Approval ⌄	**Reviewed by***	⌄
Reviewer notes			

Save   Cancel

4. Use the **Vehicle** drop-down list to select the vehicle that the new document is related to. The vehicle details will automatically populate.

5. Using the information from your insurance certificate, complete the following fields:

Feature	Description
Policy number*	Enter the Policy Number displayed on the insurance certificate.
Start date*	Enter the insurance start date using the date picker or DDMMYYYY format.
Expiry date*	Enter the insurance expiry date using the date picker or DDMMYYYY format.
Cover type*	Select the type of cover from the drop-down list.
Provider	Enter your insurance provider's name from the insurance certificate.
Is class 1 business travel included?*	Select whether the insurance covers class 1 business travel.
Is commuter travel included?	Select whether the insurance covers commuter travel.
Document	Click **browse** to select and upload an image of your insurance document.

Items marked with * are mandatory.

6. Click **Save**.

> **Note:** If you receive the following error when saving, 'Selected file type is not currently supported', the file type of the uploaded document has not been configured by your organisation. You will have to change the format of your file and try again in order to upload your documentation.
>
> Your administrator determines which file types can be uploaded within Assure Expenses. If you want to find out which file types are allowed, contact your administrator.

> **Note:** If an approver fails one of your pending Duty of Care documents, you will receive a system generated email prompting you to take action.

> **Additional Information:** If you edit and then save one of your duty of care documents after it has already been approved, the current document review is invalidated and an email is sent to your approver requesting a new review. You will be unable to claim mileage until the review has been completed and marked as "Reviewed - OK".

MOT

This guide explains how to add vehicle MOT documentation manually. If Vehicle Check is enabled for your organisation, the vehicle MOT document will be recorded automatically when adding the vehicle (if required by your organisation). Contact your administrator for more information.

1. Navigate from the **Home** Page to **Driver Compliance | My Driver Documents | My Vehicle Documents**. This will display a list of documents for each of your vehicles registered within Assure Expenses.

2. Click **New MOT** in the **Page Options** menu.

3. Click **Save**. This will direct you to the Claimant MOT Form.

4. Use the **Vehicle** drop-down list to select the vehicle that the new document is related to. The vehicle details will automatically populate.

> **Note:** You can confirm your vehicle MOT status by clicking on the vehicle enquiry link and use the information to confirm the Test Number and Expiry date status.

5. Using the information from the link above, complete the following fields:

Feature	Description
Do you require an MOT?*	Choose Yes or No. Vehicles less than 3 years old do not require an MOT.
Test Number	Enter the MOT Test Number from the Vehicle Enquiry Service using the link above.

Feature	Description
Issue date*	Enter the MOT issue date using the date picker or DDMMYYYY format.
Expiry date*	Enter the MOT expiry date using the date picker or DDMMYYYY format.
Document	Click browse to select and upload an image of your MOT Certificate.

6. Click **Save**.

Note: If you receive the following error when saving, 'Selected file type is not currently supported', the file type of the uploaded document has not been configured by your organisation. You will have to change the format of your file and try again in order to upload your documentation.

Your administrator determines which file types can be uploaded within Assure Expenses. If you want to find out which file types are allowed, contact your administrator.

Note: If an approver fails one of your pending Duty of Care documents, you will receive a system generated email prompting you to take action.

Additional Information: If you edit and then save one of your duty of care documents after it has already been approved, the current document review is invalidated and an email is sent to your approver requesting a new review. You will be unable to claim mileage until the review has been completed and marked as "Reviewed - OK".

If Vehicle Check is enabled for your organisation and the vehicle MOT has expired, a new lookup will be performed to retrieve the MOT document when next claiming using that vehicle. If the MOT is still invalid when the lookup is performed, any new MOT information will need to be recorded manually using the process above.

Service

1. Navigate from the **Home** Page to **Driver Compliance | My Driver Documents | My Vehicle Documents**. This will display a list of documents for each of your vehicles registered within Assure Expenses.

My Vehicle Documents
Vehicle Document
My Vehicle Documents

		Date Created	(Vehicle) Registration Number	(Vehicle) Make	(Vehicle) Model	Document Type	Expiry Date	Approval Status
		27/04/2023 09:07	SK-777-MN	Opel	Astra	MOT	02/07/2024	Awaiting Approval

Previous   1   Next

2. Click **New Service** in the **Page Options** menu.

Page Options
New Breakdown Cover
New Insurance
New MOT
New Service
New Tax

3. Click **Save**. This will direct you to the Claimant Service Form.

New Vehicle Service Document
Claimant Service Form

General Details

Vehicle

Vehicle*   [None]   Vehicle Engine Type   ?

Make   Model

Overview

Date of service*   Expiry date

Serviced by*   [None]

Document   browse ...

Review

Status*   Awaiting Approval   Reviewed by*

Reviewer notes

Save   Cancel

4. Use the **Vehicle** drop-down list to select the vehicle that the new document is related to. The vehicle details will automatically populate.

5. Using the information from your service document, complete the following fields:

Feature	Description
Date of service*	Enter the date of service using the date picker or DDMMYYYY format.

Feature	Description
Serviced by*	Using the drop-down list, choose who provided the service.
Document	Click browse to select and upload an image of your Service document.

6. Click **Save**.

> **Note:** If you receive the following error when saving, 'Selected file type is not currently supported', the file type of the uploaded document has not been configured by your organisation. You will have to change the format of your file and try again in order to upload your documentation.
>
> Your administrator determines which file types can be uploaded within Assure Expenses. If you want to find out which file types are allowed, contact your administrator.

> **Note:** If an approver fails one of your pending Duty of Care documents, you will receive a system generated email prompting you to take action.

> **Additional Information:** If you edit and then save one of your duty of care documents after it has already been approved, the current document review is invalidated and an email is sent to your approver requesting a new review. You will be unable to claim mileage until the review has been completed and marked as "Reviewed - OK".

Tax

This guide explains how to add vehicle tax documentation manually. If Vehicle Check is enabled for your organisation, the vehicle tax document will be recorded automatically when adding the vehicle (if required by your organisation). Contact your administrator for more information.

1. Navigate from the **Home** Page to **Driver Compliance | My Driver Documents | My Vehicle Documents**. This will display a list of documents for each of your vehicles registered within Assure Expenses.

2. Click **New Tax** in the **Page Options** menu.

3. Click **Save**. This will direct you to the Claimant Tax Form.

4. Use the **Vehicle** drop-down list to select the vehicle that the new document is related to. The vehicle details will automatically populate.

5. Using the information from the link below, complete the following fields:

> **Note:** By using the vehicle enquiry link on this page, you can confirm your vehicle tax status and use the information to confirm the **Expiry Date** and **SORN** (Statutory Off Road

Notification) status.

Feature	Description
Expiry date*	Enter the expiry date using the date picker or DDMMYYYY format.
SORN*	If you declare your vehicle as SORN, you will not be able to submit a claim against that vehicle until a valid tax document has once again been registered.
Checked by vehicle owner*	By selecting Yes, you are confirming that you have checked the vehicle is taxed to the expiry date.
Document	Click browse to select and upload an image of your Tax document.

6. Click **Save**.

Note: If you receive the following error when saving, 'Selected file type is not currently supported', the file type of the uploaded document has not been configured by your organisation. You will have to change the format of your file and try again in order to upload your documentation.

Your administrator determines which file types can be uploaded within Assure Expenses. If you want to find out which file types are allowed, contact your administrator.

Note: If an approver fails one of your pending Duty of Care documents, you will receive a system generated email prompting you to take action.

Additional Information: If you edit and then save one of your duty of care documents after it has already been approved, the current document review is invalidated and an email is sent to your approver requesting a new review. You will be unable to claim mileage until the review has been completed and marked as "Reviewed - OK".

If Vehicle Check is enabled for your organisation and the vehicle tax has expired, a new lookup will be performed to retrieve the vehicle tax document when next claiming using that vehicle. If the vehicle tax is still invalid when the lookup is performed, any new tax information will need to be recorded manually using the process above.