



Quick Guide to getting started

On the HDFT home page click on the EASY Electronic Expenses link

The screenshot shows the HDFT Intranet home page. At the top, there is a navigation bar with links for HOME, LONG TERM AND UNSCHEDULED CARE, PLANNED AND SURGICAL CARE, CHILDREN'S & COUNTY WIDE COMMUNITY CARE, TRUST WIDE, CORPORATE SERVICES, and DOCUMENTS. Below this, there are sections for EMAIL IT HELPDESK, DATIX INCIDENT REPORT, and WEB BASED EMAIL. The main content area is titled 'IT Systems' and features an 'NHS mail' section with a link to find out more about NHSmail. Below that is the 'ESR Portal / eLearning' section, which includes updates from 16/01/19 and 17/01/19. On the right-hand side, there is a vertical menu of links, including 'Employee Self Service Portal', 'BT Directory Enquiries', 'HDFT Internal Directory', 'Community Directories', 'Report Problems, Changes to directory', 'EASY Electronic Expenses' (circled in red), 'Flu Vaccinations', 'Safeguarding', 'Learning Disabilities', and 'Mental Health and'.

This will take you to the help page where you can click on the link to take you to the Easy site. You can also type into any search engine, <https://hdft.easy.giltbyte.com>
This will open the log in page

The screenshot shows the EASY login page. It has a title 'Login' and two input fields: 'Username/email' and 'Password'. Below the fields is a 'Log in' button. At the bottom, there are two links: 'Forgotten your login? Click here.' and 'New to EASY? Register here.'.

Use your payroll number as your Username.

Click Register here

We recommend using your payroll number but you can use your email address, this will only work if payroll hold the email address you are trying to use.
Payroll need to have received and processed your New Starter paperwork before your number is generated and your data is passed to EASY. Your payroll number can be found on your payslip. This is on your Employee Self Service Portal.



NHS Foundation Trust

The screenshot shows the NHS Foundation Trust website homepage. At the top, there are navigation tabs: HOME, LONG TERM AND UNSCHEDULED CARE, PLANNED AND SURGICAL CARE, CHILDREN'S & COUNTY WIDE COMMUNITY CARE, TRUST WIDE, CORPORATE SERVICES, and DOCUMENTS. Below these are service-specific links: EMAIL IT HELPDESK, DATIX INCIDENT REPORT, and WEB BASED EMAIL. The main content area is titled 'IT Systems' and includes sections for 'NHSmail', 'ESR Portal / eLearning', and 'Employee Self Service Portal' (circled in red). Other links include 'Portering Requests', 'Online Estates Reporting', 'Who Fixes What', 'Acute Oncology Pathways', 'Freedom to Speak Up', 'Antibiotic Guidelines', 'AB Prescribing Report', 'Acute Pain Referral Form', 'IT Directory Enquiries', 'HDFT Internal Directory', 'Community Directories', 'Report Problems, Changes to directory', and 'EASY Electronic Expenses'.

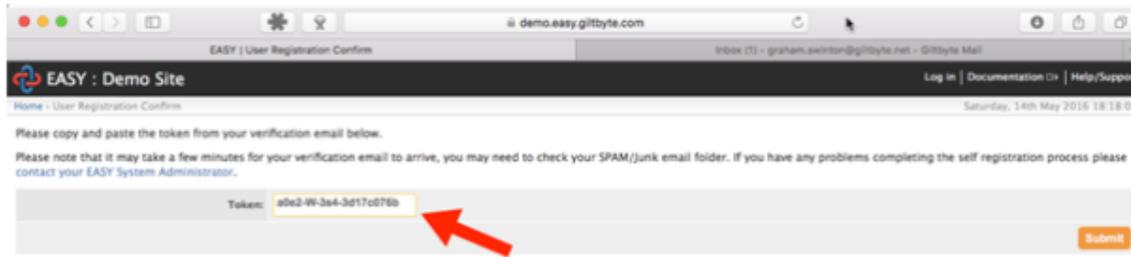
To register, click the link on the homepage and follow the instructions.
Enter your payroll / email address in this page.

The screenshot shows the 'EASY : Demo Site' user registration page. The page title is 'Name : User Registration'. It contains instructions: 'Please supply your email address or employee number so that EASY can send you a verification email. If you already have a token from a verification email you want to enter you can skip ahead to the token entry page. If you have any problems completing the self registration process please contact your EASY System Administrator.' Below the text is a form with a single input field labeled 'Email Address or Employee Number:' and a 'Submit' button. A red arrow points to the input field.

You will receive an email that has a token (this is just a temporary password). Please note that the token is only valid for 2 days

The screenshot shows an email from 'EASY Notification (No Reply)' to 'john.stevenson'. The email content is as follows:
 Hello John,
 EASY has received a request to register you as a new user. To complete the registration process you must verify your email address by either clicking on the link below or entering the following verification token on the new user registration confirmation page.
 Token: a0e2-W-3s4-3d17c076b
 Regards,
 EASY.
 Direct link: <http://localhost/user/register/confirm/?token=a0e2-W-3s4-3d17c076b>
 This is an automated message from EASY. Please do not reply to this address.
 If you are experiencing any problems using or accessing the EASY system please check the help and support page:
<http://localhost/support/>
 Or alternatively contact your local system administrator:
<http://localhost/directory/contact/admin/>

Copy and paste the token into the EASY site and submit.



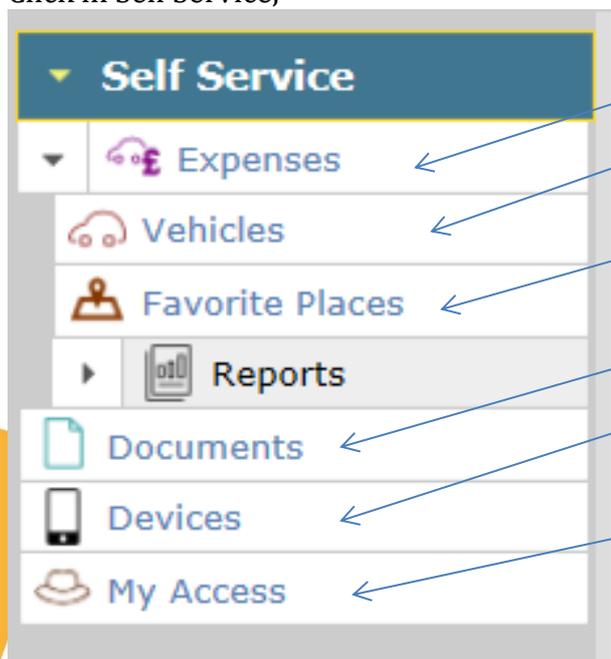
Then create a password and submit and then create a security word. Your security word is used as an electronic signature.

You will be prompted for three random characters from your security word each time you submit/amend any details in EASY. The word only needs to be 6 characters in length including one numeric character.

You will then be taken to your home page.



Click in Self Service,



Expenses is where you make claims.

Vehicles is where you register your car.

Favorite places is where you can add common places you might visit. Documents is not currently used.

Devices is where you can connect mobile phones and devices.

My Access is where you can see your access and see who can authorise your claims.



In Expenses check your home post code and your work base, these need to be correct before you can make a claim. These will only be correct if payroll have processed your New Starter Paperwork. If they are incorrect, email expenses@hdfn.nhs.uk with your correct details.

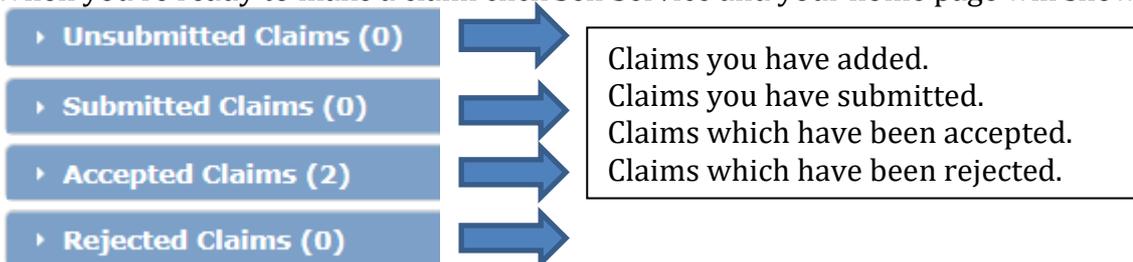
Next register your vehicle

Click Vehicles and click Add on the left hand side, this will open a new page, complete all fields which are in bold.

The start date is the first day you used your car for business mileage, engine capacity is entered as eg. 1.6 as 1600.

When you are happy with your details, click Submit. Clicking save will keep the details, but clicking submit sends a notification to your manger to check your car insurance. Please show your car insurance to your line manager.

When you're ready to make a claim click Self Service and your home page will show.



To add a new claim

Click in unsubmitted, then Add/edit.



Type of mileage

Reason for mileage

Start of day

Next stop

Date

Your car

This will prepopulate with miles to pay, the second box can be overridden if a different route was taken



Add row – by selecting this icon a blank row is added above the current row to enable you to enter the details of a new journey



Continue Journey – using this icon pre-fills a new row with most of the values from the current row so that it can be used as a continuation of the current journey, e.g. where you are returning to base or travelling on to another location. This is used to save you from entering all the same information several times.



Return Journey – selecting this icon completes a new row with the return journey details already filled in



Clear Row – clicking on this icon will clear all the fields on this row.

Other claims are for reimbursement of expenses such as parking tickets.

Enter the details similar to above. You will be required to indicate that you have Attached a file containing a photograph or scan of the receipt. When you specify that a receipt is to be attached to this claim a number of icons will appear that enables you to either add a new file or choose the file required.



is used to add a new receipt. When you click on the icon the following screen will appear.



is used to search for a receipt that has been uploaded to EASY previously.



File: No file chosen
Scan/photo/copy of document

Document type: **Receipt**

Expiry date:

Additional info:

You should click on the Choose File button to select the file or document containing the receipt. If you wish, you can use the Additional Info field to make a comment to remind yourself what the document contains.

is used to search for a receipt that has been uploaded to EASY previously. By clicking on the icon the screen shown below will be displayed.

2 results (3 total)

Ref	Document type	Expires	Uploaded	Original filename
1TGL	Receipt	(None)	2015-09-14 06:22:26	gh010915.jpg
1TGM	Receipt	(None)	2015-09-14 06:21:01	image.jpg

Select the file/document that contains the relevant receipt.

Clicking on this icon will remove the file that has been added or selected in error.

When you have entered all your claims click Save.

Go back to your home page, click in unsubmitted then select what you want to submit by clicking in the boxes on the right top the date and they should go yellow, then click submit.

The claims will then move tot the submitted area. Your Manger will now have access to accept your claims.

Unsubmitted Claims (2)

<input checked="" type="checkbox"/>	Date	Expense Type / Reason	Journey / Vehicle	Est. Net Mileage	Est. Net Other	Est. Payment				
<input checked="" type="checkbox"/>	Thu 17th January 2019	Business Mileage	Base (421 00 Harrogate Hosp, HG2 7SX) >> 421 02 Ripon Com Hosp (HG4 2PR)	12.36mi		£6.92				
<input checked="" type="checkbox"/>	Thu 17th January 2019	Clinical Visit	B15HLX: Volkswagen Polo (Private)							
<input checked="" type="checkbox"/>	Thu 17th January 2019	Business Mileage	421 02 Ripon Com Hosp (HG4 2PR) >> Base (421 00 Harrogate Hosp, HG2 7SX)	12.36mi		£6.92				
<input checked="" type="checkbox"/>	Thu 17th January 2019	Clinical Visit	B15HLX: Volkswagen Polo (Private)							
Totals				24.72mi		£13.84				

Submitted Claims (0)
Accepted Claims (2)
Rejected Claims (0)

The payroll dedline for your manager to accept these is the 7th of the month. When your manager has authorised the claim they will move to the Accepted area.