# **Intrepid User Guide**

In this guide you will learn how to:

- To apply for the study leave estimated costs page 1
- Attach evidence / documents page 4
- Claim expenses after the event page 6
- Learn the correct format for bank details page 10

## TO APPLY FOR THE STUDY LEAVE ESTIMATED COSTS

Step 1: When you first enter your leave claim you will enter 'estimated' costs.

Example 1 –

							E	- F
HESWLive_ 🔎 🗕 🖒 🗙 👔	🗿 INTREPID	6 INTREPID	×					<u>ଲ</u> ି ବ
Course:	ATLS							
Course topic:	Mandatory Training		•					
Course venue:	Bristol							
Course provider:	ATLS Provider							
APPROVERS								
Approver		Leave Type		<u>Seq</u>	Кеу	Retro	Message Approver	
Rebecca Williams-Lock		Study		0	×	~	$\underline{\bigcirc}$	
ENTITLEMENT	_	_	-	-	-	_		۲
LEAVE HISTORY			-	-	-			۲
LEAVE EXPENSES								

No leave expense claims have been made for this application

Cost type:	•	August		Septe	mber	2015		October
Estimated cost (£):		Mon	Tue	Wed	Thu	Fri	Sat	Sun
Reference:		31	1	2	3	4	5	6
Comments:		7	8	9	10	11	12	13
comments.		14	15	16	17	18	19	20
(A)		21	22	23	24	25	26	27
Add 🕑		28	29	30	1	2	3	4
		5	6	7	8	9	10	11
		Put Ap	blic Holid proved l	eave for t			der sam	e Rota Manag



Submit Application

**Step 2:** You fill out the boxes and click "add" for each cost type you are adding. These will appear as bars above these boxes and calendar. Please note for mileage it is essential that you enter into the comments box the post code of your work address and the post code of the venue. Please identify them clearly.

Example 2 -

Cost type:	Fees - Courses/Conferences only	August		Septe	mber	2015		October
stimated cost £):	200	Mon	Tue	Wed	Thu	Fri	Sat	Sun
≠). Reference:	Course Fees	31	1	2	3	4	5	6
Comments:	course rees	7	8	9	10	11	12	13
comments.		14	15	16	17	18	19	20
DbA 💿		21	22	23	24	25	26	27
Add		28	29	30	1	2	3	4
•		5	6	7	8	9	10	11

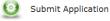
Example 3 -

			<u>Actua</u>	<u>a1</u>	Date	<u>Paid</u>	E	<u>luth.</u>	
£200.00							N	lo	
£100.00							N	lo	(
	•	August		Septe	mber	2015		October	
		Mon 31	Tue	Wed	Thu 3	Fri 4	Sat	Sun 6	
		7	8	9	10	11	12	13	
		14 21	15 22	16 23	17 24	18 25	19 26	20 27	
		28	29	30	1	2	3	4	
		£100.00	£100.00	£100.00 August Mon Tue 31 1 7 8 14 15 21 22 28 29	£100.00           August         Septe           Mon         Tue         Wed           31         1         2           9         14         15         16           21         22         23         28         29         30	κισμική         Χωσμική         September           Μοη         Τωε         Wed         Τω           31         1         2         3           7         8         9         10           14         15         16         17           21         22         23         24           28         29         30         1	£100.00           August         September         2015           Mon         Tue         Wed         Thu         Fri           31         1         2         3         4           7         8         9         11         1           14         15         16         17         18           21         22         23         24         25           28         29         30         1         2	£100.00         August         September 2015           Mon         Tue         Wed         Thu         Fri         Sat           31         1         2         3         4         5           7         8         9         0         11         12           14         15         16         17         18         19           21         22         23         24         25         26           28         29         30         1         2         3	£100.00         No           August         September 2015         October           Mon         Tue         Wed         Thu         Fri         Sat         Sun           31         1         2         3         4         5         6           7         8         9         10         11         12         13           14         15         16         17         18         19         20           21         22         23         24         25         26         27           28         29         30         1         2         3         4

<u>Step 3</u>: Once all the relevant details and costs have been entered, you are required to click the "Submit Application" button at the bottom of the screen.

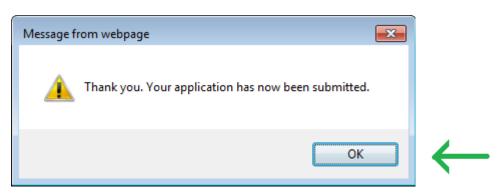
Example 4 -

EAVE EXPENSES									
Туре	<u>Est.</u>	<u>Claim</u>	A	ctual	Di	ate Paic	1	<u>Auth.</u>	
Fees - Courses/Conferences only	£200.00							No	
Travel - Public Transport/other	£100.00							No	
stimated		Mon	Tue	Wed	Thu	Fri	Sat	Sun	
ost (£):		31	1	2	3	4	5	6	
cost (£):		31 7 14	1 8 15	2 9 16	3 10 17	4 11 18	5 12 19	6 13 20	
cost (£):		7	8	9	10	11	12	13	
Comments:		7 14	8 15	9 16	10 17	11 18	12 19	13 20	



<u>Step 4:</u> You will receive two pop ups, one to confirm you wish to submit, and one to confirm the application has been submitted successfully.

Example 5 -



**Step 5:** Clicking "OK" will exit you from the record and your leave should appear in the leave history box on this page, yet to be authorised by the School Support Manager.

Example 6 -

Acceptions Teology intrepid	LEA	VE MANAGER	- PREVIOU	IS APPLICATIO	NS	ale.				
GENERAL 😪	LEAVE	E APPLICATIONS -	SEARCH CRITER	RIA					BACK	
Home My Account My Record Messages (0) Previous Page Log Off	Start	date from: date to:			: type: ise claim:		•		• 🔮	Sear Clear
LEAVE MANAGER		E HISTORY <u>Start date</u>	End date	Leave type		uthorised		<u>Estimate</u>	<u>Actı</u>	ual
Leave Application Leave Manager Leave Entitlement	→	02/11/2015 22/09/2015	03/11/2015 22/09/2015	Study Study	2.0	Yes	*	300.00 300.00		

**<u>Step 6</u>**: Once the leave approvers have approved the leave, you will see a 'yes' in the authorised column.

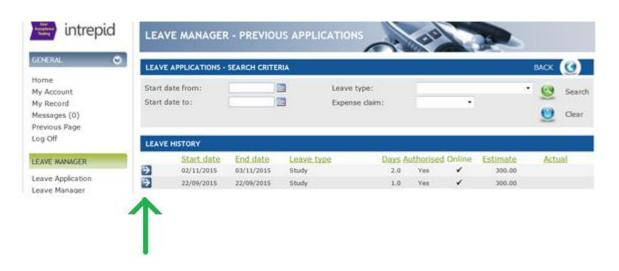
Example 7 -

general 📀	LEAVE	APPLICATIONS -	SEARCH CRITER	RIA						BACK	$( \bigcirc )$
Home My Account My Record Messages (0) Previous Page Log Off	Start d	ate from: ate to: HISTORY			Leave type: Expense claim:		=	•		• 🔮	Seard Clear
EAVE MANAGER		Start date	End date	Leave type		Days A	uthorised	Online	Estimate	Actu	Jal
eave Application	⇒ ⇒	02/11/2015 22/09/2015	03/11/2015 22/09/2015	Study Study		2.0	Yes	*	300.00		
eave Manager											

## TO ATTACH EVIDENCE / DOCUMENTS

**Step 7:** You can then go back into the claim to attach your receipts. To attach your receipts you will need to click on the blue arrow bar before the claim, around half way down the page.

Example 8 -



**Step 8:** This will open up the claim. Please click the downward pointing arrow at the right hand side of the light blue bar named "Documents"

Example 9 -

APPROVERS									
<u>\pprover</u>	<u>Leave Typ</u>	<u>be</u>		<u>Seq</u>	Кеу	Retro		Message Approver	
Rebecca Williams-Lock	Study			0	×	~	r	$\underline{\bigcirc}$	
ENTITLEMENT		_		-	-	-		_	۲
LEAVE HISTORY		_		-		-		_	۲
DOCUMENTS		_		_		_		_	۲
APPROVAL PROCESS									
	ntact Type Store Support Manager 0			Approve Yes		e (		n <mark>ents</mark> red	
LEAVE EXPENSES									
Type Fees - Courses/Conference	es only £200.00	<u>Claim</u>		<u>Actual</u>		Date Pa	<u>iid</u>	<u>Auth.</u> No	
Travel - Public Transport/o	£100.00							No	
Cost type:	•	August		Septe	mber	2015		October	
Claim amount (£):		<b>Mon</b> 31	Tue 1	Wed 2	Thu 3	Fri 4	Sat 5	<b>Sun</b> 6	
Reference:		7 14 ""	8 15	9 16	10 17	11 18	12 19	13 20	

**Step 9:** Click "browse" and it will bring up the screen below where you can navigate your computer to find the required document.

Example 10 -

APPROVERS						ľ
Approver	Leave Type	<u>Seq</u>	Кеу	Retro	Message Approver	
Rebecca Williams-Lock	Study	0	×	~	$\bigcirc$	
ENTITLEMENT		_	-	_	_	۲
LEAVE HISTORY		_	_	_	_	۲
DOCUMENTS						
File location:				Browse	0	Add

Step 10: Select the file you want and click open.

🏉 Choose File to Upload					×	9
🚱 🔍 💌 🗈 🕨 Libraries 🕨 Docume	ents 🕨			✓ ✓ Search Documents	م	]
Organize 👻 New folder				1 ·		
Some library features are unavailable due	e to unsupported library locations. Click here to learn more				х	
4 🔆 Favorites	Documents library			Arrange by:	Folder ×	
E Desktop	Includes: 2 locations			, and ge by		
Downloads	Name	Date modified	Туре		Size	
Recent Places	Downloads	08/08/2012 09:07	File folder			
4 🥽 Libraries	DSSPlayer	15/08/2013 15:33 29/05/2013 11:29	File folder File folder			
Documents	DYMO Label     DYMO Label	02/09/2013 13:10	File folder			
Music     Figure Pictures	E induction	24/06/2015 16:00	File folder			
Videos	Job Intrepid Job	05/11/2015 12:06	File folder			
_	ME My Data Sources	05/11/2015 09:00 10/02/2012 14:36	File folder File folder			
▲ P Computer ▷ ▲ OS (C:)	Wy Music	15/10/2015 08:29	File folder			
Deanery Shared (G:)	E My Pictures	04/11/2015 16:25	File folder			
Severn Deanery (K:)	My Videos	15/10/2015 08:29	File folder			
▷ 🛫 Andrew.Horton (\\xswsha.nhs.u	New folder New folder (2)	21/01/2015 16:53 21/01/2015 17:18	File folder File folder			
data (\\xswsha.nhs.uk) (S:)	New folder (2) Oriel	16/04/2015 11:30	File folder			
South Shared (U:)	BDF Favorites	22/08/2013 11:38	File folder			
> 🗣 Network	Jidying	06/07/2015 15:50	File folder			
	📙 TIG 📹 E&D Certificate	08/09/2015 16:25 04/02/2015 15:55	File folder Microsoft Word Document		38 KB	
	Phil Earl E&D Certificate	07/10/2015 09:54	Microsoft Word Document		38 KB	
	TImesheet	23/04/2015 08:53	Microsoft Excel Worksheet		17 KB	
	Type: Microsoft Excel Workshee	t	m		,	
20 items	Size: 16.9 KB Date modified: 23/04/2015 08:53	3				
~						
File <u>n</u> ame:				All Files (*.*)     Open	Cancel	a
	the file location box.					
hen appear in	the file location box.					
	the file location box.					
then appear in	the file location box.	te\User\Andre	ew.Horton\My Docum	Open		Add
then appear in		te\User\Andre	ew.Horton\My Docum	Open		Add
then appear in DOCUMENTS File location:		te\User\Andre	ew.Horton\My Docum	Open		Add
then appear in DOCUMENTS File location:		te\User\Andre	ew.Horton\My Docum	Open		Add
then appear in DOCUMENTS File location:		te\User\Andre	ew.Horton\My Docum	Open	Cancel	Add
then appear in DOCUMENTS File location: y click "add".		te\User\Andre	ew.Horton\My Docum	eents\TIr Browse	Cancel	
then appear in DOCUMENTS File location: y click "add".	kswsha.nhs.uk\data\Severn Institut	te\User\Andre	ew.Horton\My Docum	eents\TIr Browse	Cancel	
then appear in DOCUMENTS File location: y click "add".		te\User\Andre	ew.Horton\My Docum	eents\TIr Browse	Cancel	

Do this as many times as necessary to upload all of your documents. Please note that once you click "add", a document cannot be removed from Intrepid so please be careful to select the correct one.

### CLAIMING COURSE FEES AFTER THE EVENT

**Step 12:** To apply for your course fees please scroll down to the 'leave expenses' section at the bottom of the page. If you entered any 'estimated' expenses when you applied for the leave, you will be able to see these here.

Example 14 -

Example 15 –

APPROVERS											
Approver		Leave 1	Гуре			<u>Seq</u>	Key	Retro	D	Message Approver	
Rebecca Williams-Lock		Study				0	×		✓	$\underline{\bigcirc}$	
ENTITLEMENT	_	_		_		_	_	_		_	۲
LEAVE HISTORY											۲
DOCUMENTS	_	_					-	-			۲
APPROVAL PROCESS											
<u>Contact</u>	Contact Type		Seq	Key	Retro	Approv	ed Dat	<u>te</u>	Comr	<u>nents</u>	
Rebecca Williams-Lock	School Support Mana	ager	0	×	~	Yes	05/	11/2015	Approv	ved	
LEAVE EXPENSES											
Туре		Est.		Claim	<u>1</u>	<u>Actual</u>		Date F	Paid	<u>Auth.</u>	
> Fees - Courses/Conf	erences only	£200.00								No	
Travel - Public Trans	port/other	£100.00								No	
						_					
Cost type:				August		Septe	ember	2015		October	
Claim amount				Mon	Tue	Wed	Thu	Fri	Sat	Sun	
(£):				31	1	2	3	4	5	6	
Reference:		] _		7	8	9	10	11	12	13	
Comments:		1	_	14	15	16	17	18	19	20	

<u>Step 13:</u> If you are claiming for fees that you <u>DID NOT provide an estimate</u> for example an evening meal on an overnight stay:

Select the "Cost Type", add the claim amount and add a comment in the box.

Est.	<u>Clair</u>	<u>n</u>	<u>Actual</u>		Date F	Paid	<u>Aut</u>
£200.00							No
£100.00							No
•	<u>August</u>		Septe	mber	2015	5	Octobe
	Mon 31	Tue	Wed	Thu 3	Fri 4	Sat	Sun 6
	7	8	9	10	11	12	13
	14	15	16	17	18	19	20
	21	22	23	24	25	26	27
	28	29	30	1	2	3	4
	5	6	7	8	9	10	11
	£100.00	£100.00 August Mon 31 7 14 21 28	£100.00  August Mon Tue 31 1 7 8 14 15 21 22 28 29	£100.00  August Septe Mon Tue Wed 31 1 2 7 8 9 14 15 16 21 22 23 28 29 30	£100.00  August September Mon Tue Wed Thu 31 1 2 3 7 8 9 10 14 15 16 17 21 22 23 24 28 29 30 1	£100.00       August       September       2015         Mon       Tue       Wed       Thu       Fri         31       1       2       3       4         7       8       9       10       11         14       15       16       17       18         21       22       23       24       25         28       29       30       1       2	Mugust       September 2015         Mon       Tue       Wed       Thu       Fri       Sat         31       1       2       3       4       5         7       8       9       10       11       12         14       15       16       17       18       19         21       22       23       24       25       26         28       29       30       1       2       3

Туре		Est.	<u>Clair</u>	<u>n</u>	<u>Actual</u>		Date F	Paid	<u>Auth.</u>
🗲 Fees - Coι	urses/Conferences only	£200.00							No
Travel - Pı	ublic Transport/other	£100.00							No
Cost type:	Subsistence	•	August		Septe	mber	2015	5	October
Claim amount	10		Mon	Tue	Wed	Thu	Fri	Sat	Sun
(£):			31	1	2	3	4	5	6
Reference:	Overnight meal		7	8	9	10	11	12	13
Comments			14	15	16	17	18	19	20
			21	22	23	24	25	26	27
O Add			28	29	30	1	2	3	4
			5	6	7	8	9	10	11
			Nat Put Apr	tional E blic Hol proved	leave for	this doc	tor		me Rota Ma

"Click add", and it will appear in the list of expenses above.

#### Example 17 -

Туре	Est.	<u>Clain</u>	<u>n</u>	<u>Actual</u>		Date Pa	aid	<u>Aut</u>
Fees - Courses/Conferences only	£200.00							No
Subsistence		£10.0	0					No
🄁 Travel - Public Transport/other	£100.00							No
Cost type:	-	<u>August</u>		Septe	mber	2015		October
Claim amount (£):		<b>Mon</b> 31	Tue	Wed 2	Thu 3	Fri 4	Sat 5	Sun 6
Reference:		7	8	9	10	11	12	13
Comments:		14	15	16	17	18	19	20
		21	22	23	24	25	26	27
6		28	29	30	1	2	3	4
Add 💽		5	6	7	8	9	10	11

**<u>Step 14</u>**: If you are claiming for fees that you **<u>DID provide an estimate</u>** for:

Please click the blue arrow on the left hand side of the row with an estimate figure. This will change the boxes below and bring up any details you previously entered.

Example	18 -	
---------	------	--

Type	Est.	Clai	m	Actual		Date P	aid	Aut
Fees - Courses/Conferences only	£200.00							No
Subsistence		£10.	00					No
Cost type:		August		Septe	mber	2015		October
Claim		Mon	Tue	Wed	Thu	Fri	Sat	Sun
amount (£):		31	1	2	3	4	5	6
Reference:		7	8	9	10	11	12	13
Comments:		14	15	16	17	18	19	20
		21	22	23	24	25	26	27
6.2		28	29	30	1	2	3	4
Add		5	6	7	8	9	10	11

**Step 15:** Please enter the amount you are claiming for the relevant cost. In this case it is my course fees and the click "save changes".

Example 19 -

Type		Est.	Claim	e	Actual		ate Pai	d	Auth
Fees - Course	es/Conferences only	£200.00	£199.99						No
Subsistence			£10.00						No
Cost type:	Fees - Courses/Confer	rences only	August		Septe	mber	2015	;	Octob
Claim amount	199.99		Mon	Tue	Wed	Thu	Fri	Sat	Sun
(£):	199.99		31	1	2	3	4	5	6
	Course Fees		7	8	9	10	11	12	13
Comments:			14	15	16	17	18	19	20
			21	22	23	24	25	26	27
			28	29	30	1	2	3	- 4
O Save	changes					8			11

**<u>Step 16:</u>** This will populate the relevant row above with a claim amount. Do this for all of your estimated claims.

Example 20 -

Type	Est.	Claim	Actual	Date Paid	Auth.
Fees - Courses/Conferences only	£200.00	£199.99			No
Subsistence		£10.00			No
		1			

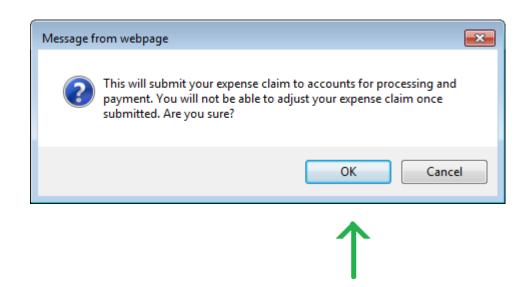
<u>Step 17:</u> Once this has been done, a new button named "Submit Expense Claim" will appear further down the page. When you are ready, click "Submit Expense Claim"

Example 21 -

Type	Est.	Cla	im	Actua	<u>d</u>	Date	Paid	Auth
Fees - Courses/Conferences only	£200.00	£199.	.99					No
Subsistence		£10.	.00					No
Cost type:		August		Septe	mber	2015	5	October
Claim amount		Mon	Tue	Wed	Thu	Fri	Sat	Sun
(£):		31	1	2	3	4	5	6
Reference:		7	8	9	10	11	12	13
Comments:		14	15	16	17	18	19	20
		21	22	23	24	25	26	27
O Add		28	29	30	1	2	3	4
<b>U AGG</b>		5	6	7	8	9	10	11

**Step 18:** You will get a pop up asking you to confirm you wish to submit the claim. Click "OK" if you are happy.

Example 22 -



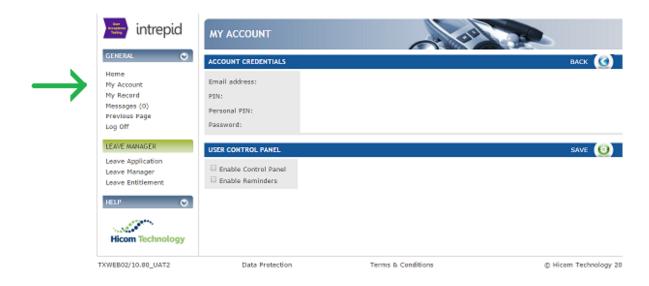
**Step 19:** If it has gone through successfully you will see a black tick with "leave expenses submitted" next to it. Your expenses will not show through for approval unless you see this sign appear.

Fees - Courses/Conferences only	<u>Est.</u> £200.00	<u>Claim</u> £199.99		<u>tual</u>	Date	e Paid	Aut No
Subsistence	2200.00	£10.00					No
Travel - Public Transport/other	£100.00	£100.00	)				No
Leave expenses submitted	Aug	ust	Septe	mber	2015		<u>October</u>
•	Мо	on Tue	Wed	Thu	Fri	Sat	Sun
<b></b>	3	1 <b>1</b>	2	3	4	5	6
	7	8	9	10	11	12	13
	14	4 15	16	17	18	19	20
	2	1 22	23	24	25	26	27
•	2	3 29	30	1	2	3	4
	5	6	7	8	9	10	11
		Public Ho Approved	leave for			nder sa	me Rota I

#### UPDATING BANK DETAILS

For us to reimburse your expense claims it is essential you keep your bank details up to date. **Step 20:** Click on "My Account"

Example 24 -



**<u>Step 21:</u>** Then select "Bank details" on the bottom left hand side of the page.

#### Example 25 -

	intrepid	PERSON - BANK DETAIL	20	
	GENERAL 🕤	PERSON SUMMARY		BACK (C)
	Nome Hy Account My Recard Messages (0) Previous Page Log Off	Surname: Forexames: GMC/GDC: Record Type: Educational supervisor: Clificial supervisor:	2	Exit record
	PERSON DATA	BANK DETAILS		SAVE (O)
$\rightarrow$	Personal Details     Bank Details     Placements     Qualifications	Name: Address 1: Address 2: Address 3: Address 4: Post code: Sort code: Account number:		
	TXWEB02/10.80_UAT2	Data Protection	Terma & Conditions	© Hicom Technology 2016

<u>Step 22:</u> Enter your bank details. Please note in the "name" and "address" fields, it is asking for the name and address of your bank e.g. HSBC, NatWest. When you are ready click "Save"

Example 26 -

GENERAL 😔	PERSON SUMMARY		васк 🕜
Home My Account My Record Messages (0) Previous Page Log Off	Surname: Forenames: GMC/GDC: Record Type: Educational supervisor: Clinical supervisor:	2	Exit record
PERSON DATA	BANK DETAILS		SAVE (0)
Personal Details	Name:		
Bank Details	Address 1:		
Placements	Address 2:		
Qualifications	Address 3:		
Hicom Technology	Address 4: Post code: Sort code: Account number:		