

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 –

The screenshot shows the Intrepid web application interface. At the top, there are browser tabs for 'HESWLive' and 'INTREPID'. Below the tabs, there are input fields for 'Course: ATLS', 'Course topic: Mandatory Training', 'Course venue: Bristol', and 'Course provider: ATLS Provider'. Below these fields is a table titled 'APPROVERS' with columns: Approver, Leave Type, Seq, Key, Retro, and Message Approver. The table contains one row for Rebecca Williams-Lock with Leave Type 'Study', Seq '0', Key 'x', and Retro '✓'. Below the table are sections for 'ENTITLEMENT', 'LEAVE HISTORY', and 'LEAVE EXPENSES'. The 'LEAVE EXPENSES' section shows 'No leave expense claims have been made for this application'. Below this, there are input fields for 'Cost type:', 'Estimated cost (£):', 'Reference:', and 'Comments:'. To the right of these fields is a calendar for September 2015, with columns for August, September 2015, and October. The calendar shows dates from 1 to 31. Below the calendar is a legend: National Exam day (blue), Public Holidays (cyan), Approved leave for this doctor (magenta), and Leave approved for other trainees under same Rota Manager (yellow). At the bottom left, there is a green circular button with a plus sign and the text 'Add', and another green circular button with a plus sign and the text 'Submit Application'.

Approver	Leave Type	Seq	Key	Retro	Message Approver
Rebecca Williams-Lock	Study	0	x	✓	

No leave expense claims have been made for this application

Cost type:

Estimated cost (£):

Reference:

Comments:

Add

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		
5	6	7	8	9	10	11		

National Exam day
 Public Holidays
 Approved leave for this doctor
 Leave approved for other trainees under same Rota Manager

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 -

LEAVE EXPENSES

No leave expense claims have been made for this application

Cost type:

Estimated cost (£):

Reference:

Comments:

 Add



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	
5	6	7	8	9	10	11	

- National Exam day
- Public Holidays
- Approved leave for this doctor
- Leave approved for other trainees under same Rota Manager

Example 3 -

LEAVE EXPENSES

Type	Est.	Claim	Actual	Date Paid	Auth.
→ Fees - Courses/Conferences only	£200.00				No 
→ Travel - Public Transport/other	£100.00				No 

Cost type:

Estimated cost (£):

Reference:

Comments:

 Add

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	
5	6	7	8	9	10	11	

- National Exam day
- Public Holidays
- Approved leave for this doctor
- Leave approved for other trainees under same Rota Manager

Step 3: 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 -

LEAVE HISTORY

LEAVE EXPENSES

Type	Est.	Claim	Actual	Date Paid	Auth.
→ Fees - Courses/Conferences only	£200.00				No 
→ Travel - Public Transport/other	£100.00				No 

Cost type:

Estimated cost (£):

Reference:

Comments:

 Add

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	
5	6	7	8	9	10	11	

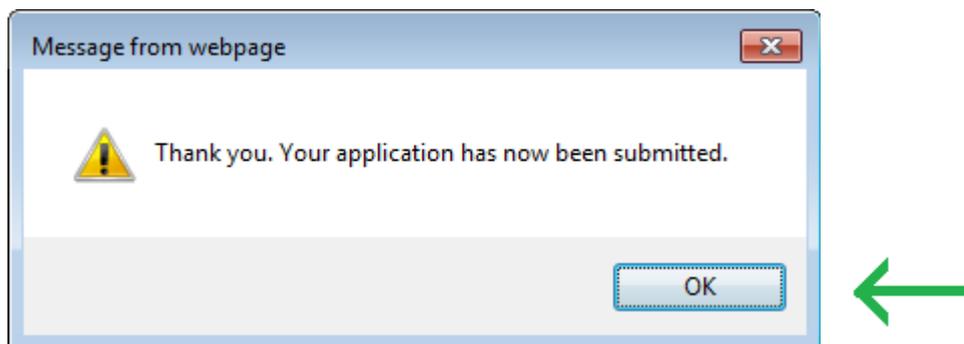
- National Exam day
- Public Holidays
- Approved leave for this doctor
- Leave approved for other trainees under same Rota Manager

 Submit Application

 Cancel

Step 4: 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 -

	Start date	End date	Leave type	Days Authorised	Online	Estimate	Actual
→	02/11/2015	03/11/2015	Study	2.0	Yes ✓	300.00	
→	22/09/2015	22/09/2015	Study	1.0	✓	300.00	

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

Example 7 -

	Start date	End date	Leave type	Days Authorised	Online	Estimate	Actual
→	02/11/2015	03/11/2015	Study	2.0	Yes ✓	300.00	
→	22/09/2015	22/09/2015	Study	1.0	Yes ✓	300.00	

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 -

The screenshot shows the Intrepid LEAVE MANAGER interface. On the left is a navigation menu with 'LEAVE MANAGER' highlighted. The main content area is titled 'LEAVE MANAGER - PREVIOUS APPLICATIONS' and contains search criteria and a table of leave history. A green arrow points to the 'Leave Manager' link in the left-hand navigation menu.

LEAVE HISTORY							
	Start_date	End_date	Leave_type	Days Authorised	Online	Estimate	Actual
	02/11/2015	03/11/2015	Study	2.0	Yes	✓	300.00
	22/09/2015	22/09/2015	Study	1.0	Yes	✓	300.00

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 -

The screenshot shows a detailed view of a claim with several sections: APPROVERS, ENTITLEMENT, LEAVE HISTORY, DOCUMENTS, APPROVAL PROCESS, and LEAVE EXPENSES. A green arrow points to the 'DOCUMENTS' tab, which has a downward arrow icon on its right side.

APPROVERS						
Approver	Leave Type	Seq	Key	Retro	Message Approver	
Rebecca Williams-Lock	Study	0	x	✓		

APPROVAL PROCESS							
Contact	Contact Type	Seq	Key	Retro	Approved	Date	Comments
Rebecca Williams-Lock	School Support Manager	0	x	✓	Yes	05/11/2015	Approved

LEAVE EXPENSES						
Type	Est.	Claim	Actual	Date Paid	Auth.	
Fees - Courses/Conferences only	£200.00				No	
Travel - Public Transport/other	£100.00				No	

Cost type:	September 2015						
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Claim amount (£):	31	1	2	3	4	5	6
Reference:	7	8	9	10	11	12	13
Comments:	14	15	16	17	18	19	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						
Approver	Leave Type	Seq	Key	Retro	Message Approver	
Rebecca Williams-Lock	Study	0	x	✓		

ENTITLEMENT	

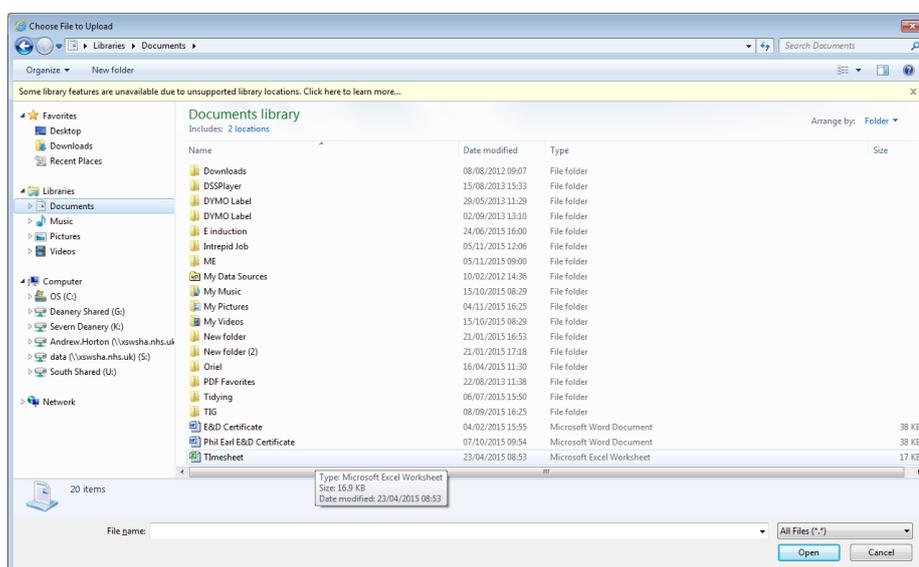
LEAVE HISTORY	

DOCUMENTS	
File location:	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add"/>



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

Example 11 -



Step 11: It will then appear in the file location box.

Example 12 -

DOCUMENTS	
File location:	<input type="text" value="\\xswsha.nhs.uk\data\Severn Institute\User\Andrew.Horton\My Documents\TIR"/> <input type="button" value="Browse..."/> <input type="button" value="Add"/>

And then simply click “add”.

Example 13 -

DOCUMENTS	
File location:	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Add"/>
	File Title Timesheet.xlsx



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 -

APPROVERS						
Approver	Leave Type	Seq	Key	Retro	Message Approver	
Rebecca Williams-Lock	Study	0	*	✓		

APPROVAL PROCESS							
Contact	Contact Type	Seq	Key	Retro	Approved	Date	Comments
Rebecca Williams-Lock	School Support Manager	0	*	✓	Yes	05/11/2015	Approved

LEAVE EXPENSES						
Type	Est.	Claim	Actual	Date Paid	Auth.	
→ Fees - Courses/Conferences only	£200.00				No	
→ Travel - Public Transport/other	£100.00				No	

Cost type:

Claim amount (£):

Reference:

Comments:

	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		

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

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

Example 15 –

LEAVE EXPENSES						
Type	Est.	Claim	Actual	Date Paid	Auth.	
→ Fees - Courses/Conferences only	£200.00				No	
→ Travel - Public Transport/other	£100.00				No	

Cost type:

Claim amount (£):

Reference:

Comments:

Add

	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		
5	6	7	8	9	10	11		

- National Exam day
- Public Holidays
- Approved leave for this doctor
- Leave approved for other trainees under same Rota Manager

Example 16 -

LEAVE EXPENSES						
Type	Est.	Claim	Actual	Date Paid	Auth.	
→ Fees - Courses/Conferences only	£200.00				No	
→ Travel - Public Transport/other	£100.00				No	

Cost type:

Claim amount:

Reference:

Comments:

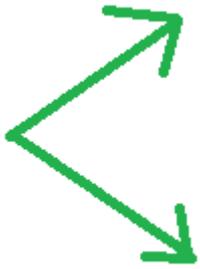
Add

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	
5	6	7	8	9	10	11	

- National Exam day
- Public Holidays
- Approved leave for this doctor
- Leave approved for other trainees under same Rota Manager

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

Example 17 -



LEAVE EXPENSES						
Type	Est.	Claim	Actual	Date Paid	Auth.	
→ Fees - Courses/Conferences only	£200.00				No	
→ Subsistence		£10.00			No	
→ Travel - Public Transport/other	£100.00				No	

Cost type:

Claim amount:

Reference:

Comments:

Add

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	
5	6	7	8	9	10	11	

- National Exam day
- Public Holidays
- Approved leave for this doctor
- Leave approved for other trainees under same Rota Manager

Step 14: If you are claiming for fees that you **DID provide an estimate** 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 -

LEAVE EXPENSES						
Type	Est.	Claim	Actual	Date Paid	Auth.	
→ Fees - Courses/Conferences only	£200.00				No	
→ Subsistence		£10.00			No	

Cost type:

Claim amount:

Reference:

Comments:

Add

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	
5	6	7	8	9	10	11	

- National Exam day
- Public Holidays
- Approved leave for this doctor
- Leave approved for other trainees under same Rota Manager

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 -

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

Cost type:

Claim amount (£):

Reference:

Comments:

 Save changes

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	
5	6	7	8	9	10	11	

 National Exam day
 Public Holidays
 Approved leave for this doctor
 Leave approved for other trainees under same Rota Manager

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

Example 20 -

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

Step 17: 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 -

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

Cost type:

Claim amount (£):

Reference:

Comments:

 Add

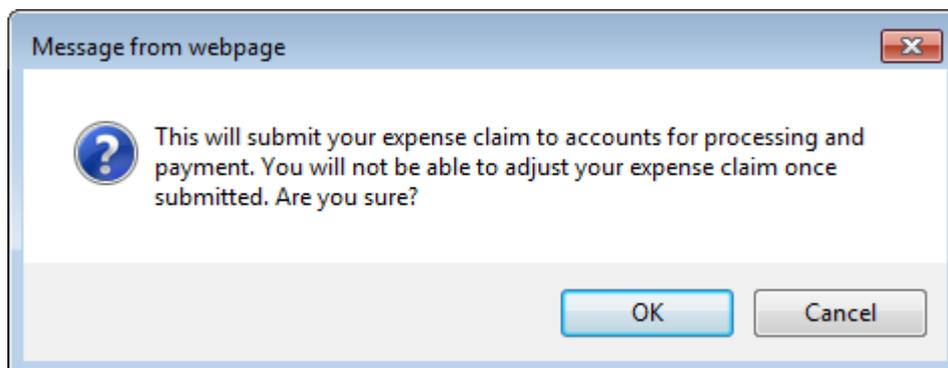
 Submit expense claim

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	
5	6	7	8	9	10	11	

 National Exam day
 Public Holidays
 Approved leave for this doctor
 Leave approved for other trainees under same Rota Manager

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.

Example 23 -

LEAVE EXPENSES					
Type	Est.	Claim	Actual	Date Paid	Auth.
Fees - Courses/Conferences only	£200.00	£199.99			No
Subsistence		£10.00			No
Travel - Public Transport/other	£100.00	£100.00			No

✓ Leave expenses submitted	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
	5	6	7	8	9	10	11

 National Exam day
 Public Holidays
 Approved leave for this doctor
 Leave approved for other trainees under same Rota Manager

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 -

intrepid

MY ACCOUNT

ACCOUNT CREDENTIALS BACK

Email address:
PIN:
Personal PIN:
Password:

USER CONTROL PANEL SAVE

Enable Control Panel
 Enable Reminders

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Step 21: Then select “Bank details” on the bottom left hand side of the page.

Example 25 -

intrepid

PERSON - BANK DETAIL

PERSON SUMMARY BACK

Surname:
Forenames:
GMC/GDC:
Record Type:
Educational supervisor:
Clinical supervisor:

BANK DETAILS SAVE

Name:
Address 1:
Address 2:
Address 3:
Address 4:
Post code:
Sort code:
Account number:

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Step 22: 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 -

intrepid

PERSON - BANK DETAIL

PERSON SUMMARY BACK

Surname:
Forenames:
GMC/GDC:
Record Type:
Educational supervisor:
Clinical supervisor:

BANK DETAILS SAVE

Name:
Address 1:
Address 2:
Address 3:
Address 4:
Post code:
Sort code:
Account number:

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