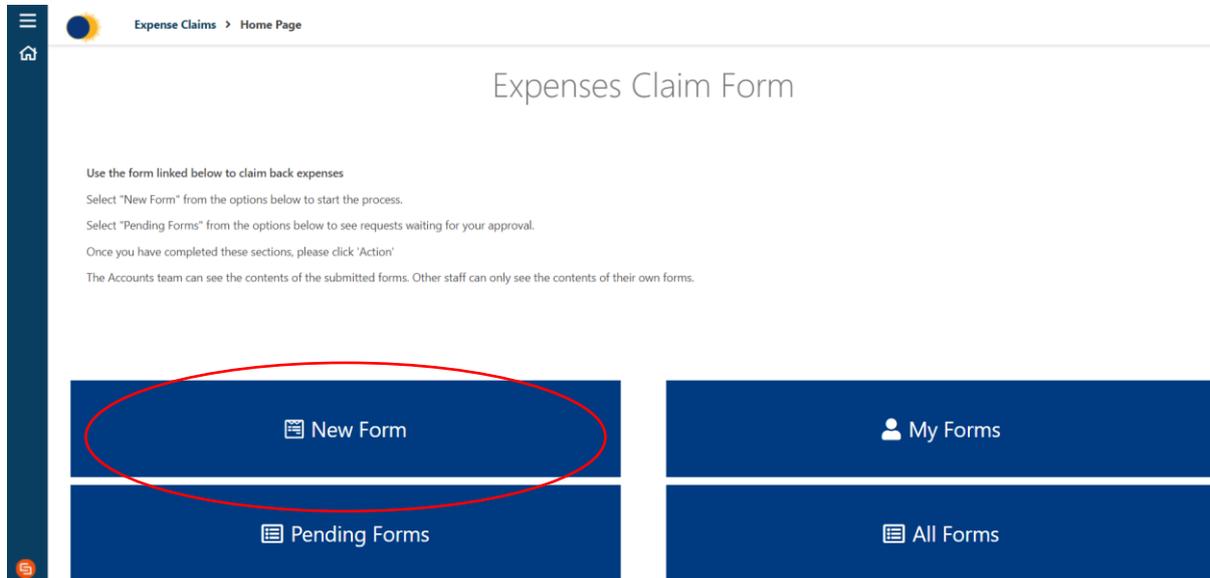# Guide to Submitting an Expense Claim

1. Click on New Form

2. Select your department from the drop-down list and enter the name of the person that will need to authorise the form in the 'Approver' box (this will normally be your line manager).

Note:

Eye tests should be sent to the HR Manager for approval

Professional membership subscriptions should be sent to the L&D Manager for approval

3. Begin adding the lines to your form by clicking on '+ Add' and completing the boxes.
   To delete a row, click on the three dots (see below) and select 'delete'.
   To add attachments, click on the three dots (see below) and select 'Add attachments'.

For each line, please attach a PDF scan of the receipt to evidence the amount being claimed.

4. Finally, enter the sort code and account number of the bank account that you would like the claim to be paid into. Then click on 'Actions>Submit Request'.

- The request will be sent as an email to the approver for authorisation.
- If further changes or corrections are to be made the approver will reject the claim with a relevant explanation. You will then receive an email notification of the rejection.
- On approval, it will be sent to the Finance department for processing and payment.
- Once processed, you will receive an email advising you of the payment date.