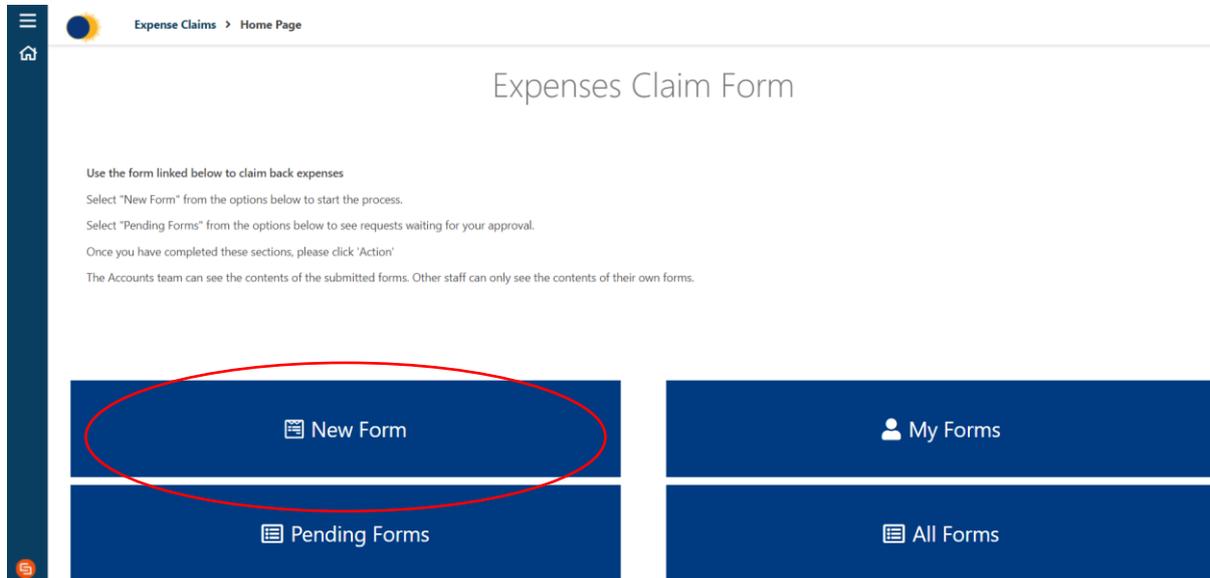


# Guide to Submitting an Expense Claim

## 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).

The screenshot shows the 'EXPENSES CLAIM FORM' submission page. At the top, there is a navigation bar with 'Actions', 'Save as draft', and 'Close'. Below this, the title 'EXPENSES CLAIM FORM' is centered. A block of text provides instructions: 'Receipts are required for all accommodation, subsistence and other expenses. The cost code must be filled in before submitting this form to the Accounts Department. No reimbursement will be made unless this form has been properly authorised'. Below the text is a section titled 'Your Details' with the following fields: 'Requestor' (Michael Lewis), 'Department / Ward \*' (circled in red), 'Submission Date \*' (10/09/2021), and 'Approver \*' (circled in red).

### 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

- 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'.

**Car Mileage**

+ Add

Date *	Journey from/to *	Purpose *	Distance [MI] *	Rate *	Total	Cost Centre *	Expense Code *
⋮					£0.00		31020 - Travel

**Travel/Accommodation/Subsistence/Other Expenses**

+ Add

Date of Receipt *	Title *	Total *	Cost Centre *	Expense Code *	Sub Analysis Code
⋮					

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

- 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'.

**Summary**

Travel/Accommodation etc.	Car Mileage	Total	Payment Method	Sort Code *	Account No *
£0.00	£0.00	£0.00	<input checked="" type="radio"/> Bank Transfer		

Actions ▾ Save as draft Close

- 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.