

User guidance on how to complete the Student Expense Claim form and what back up information / receipts are required:

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### **1. Student Expense Claim Form**

This document can be found on the Forms database accessible by both Staff and Students

The claim form must be completed by the Student and submitted to School / College department with all relevant back up, for review, approval and submission to Finance, Accounts Payable Department

### **2. Completion of Student Expense Claim Form**

- a) Please select relevant tab relating to the bank account expenses are to be paid into
  - Claim Form - UK Bank Payment; or
  - Claim Form – non-UK Bank Payment
- b) Form should be completed by the Student
- c) Complete all fields on the Form, including the Y/N questions
- d) A description for each expenditure type is required, for example: Travel, Hotel, Meals, etc....
  - Travel: train from Glasgow to London for XXX Project / Trip / Reason
  - Hotel: overnight stay in London for XXX Project / Trip / Reason
- e) Student must complete and Print Name Fields

### **3. Receipts and back up documentation:**

- a) All Claims should be accompanied by valid receipts (refer to Student Expenses Policy for what constitutes a valid receipt)
- b) Details of Bank Account details
  - Back up should clearly show beneficiary name and bank account details
  - As per Claim Form, the acceptable format in which the details can be provided is copy bank statement with balances and transaction redacted, copy blank cheque or copy pay in slip

## 4. Claim Submission by Student

As per Student Expenses Policy pre-approval for all expenditure should be sought in line with the Policy.

Students should submit their Claim Form via email, with valid receipts and bank account back up documentation to their school / institute for review and approval.

Expense Claims should be made well within the time limitation to avoid rejection, as per Policy

## 5. Approval

Approvers should review Claim and back up receipts / documentation, complete the insurance related questions and then add their name and the date approved to the Claim Form

The Claim should be sent to Finance, Accounts Payable and include the Approvers' email confirmation they are happy for the Claim to be paid, if not received from the Approver themselves – ie sent to local administration support team for onward transmission to Finance.

The email to Finance Accounts Payable Team should include:

- a) Completed Student Expenses Claim Form
- b) All valid receipts
- c) Bank Account details back up
- d) Approvers confirmation to pay (Student and Budget Holder Emails)
- e) All of the above must be consolidated into one PDF document (guidance on how to complete this is provided in the "How to Merge Documents" tab of the Student Expense Claim Form)
- f) Accounts Payable email address: [finance-accountspayable@glasgow.ac.uk](mailto:finance-accountspayable@glasgow.ac.uk)