Non-Staff Expenses (NSE) Guidance for Claimants

Background

Expenses for non-staff at the University of St Andrews are processed online which makes the process paperless and seamless. To begin your claim you must contact the relevant School/Unit Administrator. You will be sent a secure link by email from the School/Unit to access the Non-Staff Expenses (NSE) system. Your claim can be completed on any computer, smartphone or mobile device.

If your claim is related to an EU funded project, then due to EU rulings you are required to send in the original receipts to the School Administrator as well as scanned images with your online claim. Until these are received you will not be reimbursed. Payments are made monthly to your nominated bank account.

Accessing the system

You can access the NSE system on any electronic device (e.g. smartphones, laptops, other mobile devices etc.). The system is very intuitive and you should find it easy to set up your profile and submit a claim. A guide is also available on how to use the system and this will be sent along with the initial email you receive from the School/Unit you have incurred the expense with.

1. Click on the link in the email provided by the School/Unit
2. Login using your email address and temporary password provided
3. For security reasons it is advisable to change your password immediately. This is done via the “change password” option at the top of the form. Follow the on screen instructions. You will receive an email confirmation that your password change was successful.

Setting up your profile

1. For first time claimants you need to set up your profile. Enter your contact details and click “save.”
2. Bank accounts – select the country of your bank account and enter details
3. Account nickname is for your reference only e.g. personal account, joint account, etc.
4. Bank details can’t be edited for security purposes. These can only be deleted and re-entered
5. For existing claimants you can edit your profile at any time
6. Once your profile is updated, click on “your claims” to start the process of filling in your claim.

Completing your claim

1. New claims will have a status of “in progress”
2. Click “open” to start completing your claim which will have a unique claim number
3. You must enter a business purpose/reason for your claim and click “save”
4. By clicking on “Bank account” you can view the account your claim will be paid to – for security reasons your full bank details are not displayed
5. Complete the relevant section headings as required. Your claim will be saved automatically as you complete each section. You should be attaching a scanned image of each receipt to each line of your claim (see “receipts” section below for full details)
6. You have the option to edit or delete any line prior to you submitting your claim.
7. Receipts should be attached per line as per the University’s expenses policy. You will be able to view a summary of your receipts in the “Attachments” section at the foot of the claim.

Note: If your claim is related to an EU funded project, then you are required to send in the original receipts to the School Administrator as well as scanned images with your online claim. Please include your name, email address and claim number when sending in your original receipts. **Until these are received you will not be reimbursed.**

8. If you wish to provide additional information to support your claim this can be entered into the “Additional information” box at the foot of the claim form.
9. The total of your claim will be shown in the “Expenses totals.”
10. Click “submit” for approval once claim is complete.
11. The status of your claim will be updated to “submitted.”
12. Your claim has now been automatically sent to your School/Unit for checking and authorisation.

**Receipts**

You need to scan a copy of all your receipts into the system. The easiest way to do this is by taking photos of your receipts from your mobile phone or some other electronic device.

When attaching your receipts in support of your claim, please ensure the following:

- Receipts should be in the name of the claimant. Where the purchase was made by someone else we require written confirmation from the purchaser that they authorise the reimbursement to be paid to the claimant

- Scanned images should be clear with a breakdown of each item that has been purchased

- Your purchases must have been incurred within the last 3 months of making your claim

**Tracking your claim**

You will be able to log into the Non-Staff Expenses to track the status of your claim(s).

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>In progress</td>
<td>Complete and submit claim</td>
<td>Claimant</td>
</tr>
<tr>
<td>Submitted</td>
<td>Claim has been submitted and is now with School/Unit for checking</td>
<td>School/Unit</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Claim cancelled</td>
<td>Claimant</td>
</tr>
<tr>
<td>Pre-authorised</td>
<td>Checked and ready for authorisation</td>
<td>School/Unit</td>
</tr>
<tr>
<td>Authorised</td>
<td>Claim now with Finance for processing payment</td>
<td>Finance (Accounts Payable)</td>
</tr>
<tr>
<td>Reimbursed</td>
<td>Payment is now ready to be sent to your bank account</td>
<td>Finance (Accounts Payable)</td>
</tr>
<tr>
<td>With Salaries</td>
<td>Claim will be reimbursed by Salaries</td>
<td>Salaries</td>
</tr>
</tbody>
</table>
Additional claims

For any future claims, please contact the relevant School/Unit Administrator who will provide you with a link to enable you to complete a new claim.

Help

Passwords

Your account will be locked after 3 failed login attempts. Click on “forgotten password?” to unlock your account. Input email address for one time password. You must follow the email link to enter one time password where you will be asked to create a new password for your account.

Foreign currency

The exchange rate used for conversion is based on the date that the actual expense is incurred.

1. In the currency field select the currency that you have incurred the expense in
2. Enter the value of the receipt (in the foreign currency)
3. The system will then convert the amount into sterling
4. If you have been charged more than the calculated amount on your bank statement, then you can change the amount claimed
5. Click on the “edit” button
6. In the currency field change the currency to sterling
7. In the amount field enter the sterling amount that you have charged on your statement
8. Click on “submit”
9. Remember, you must submit a copy of your bank statement to support your claim.

Last updated 28 February 2017. ERG