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.

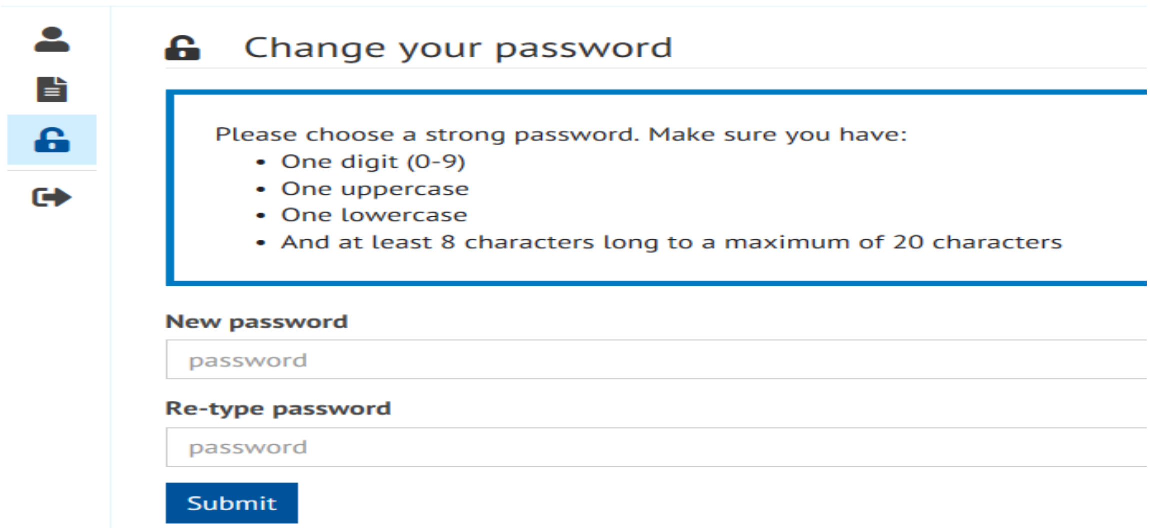
Payments are made monthly to your nominated bank account.

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. Instructions on how to use the system will be sent along with the initial email you receive from the School/Unit you have incurred the expense with.

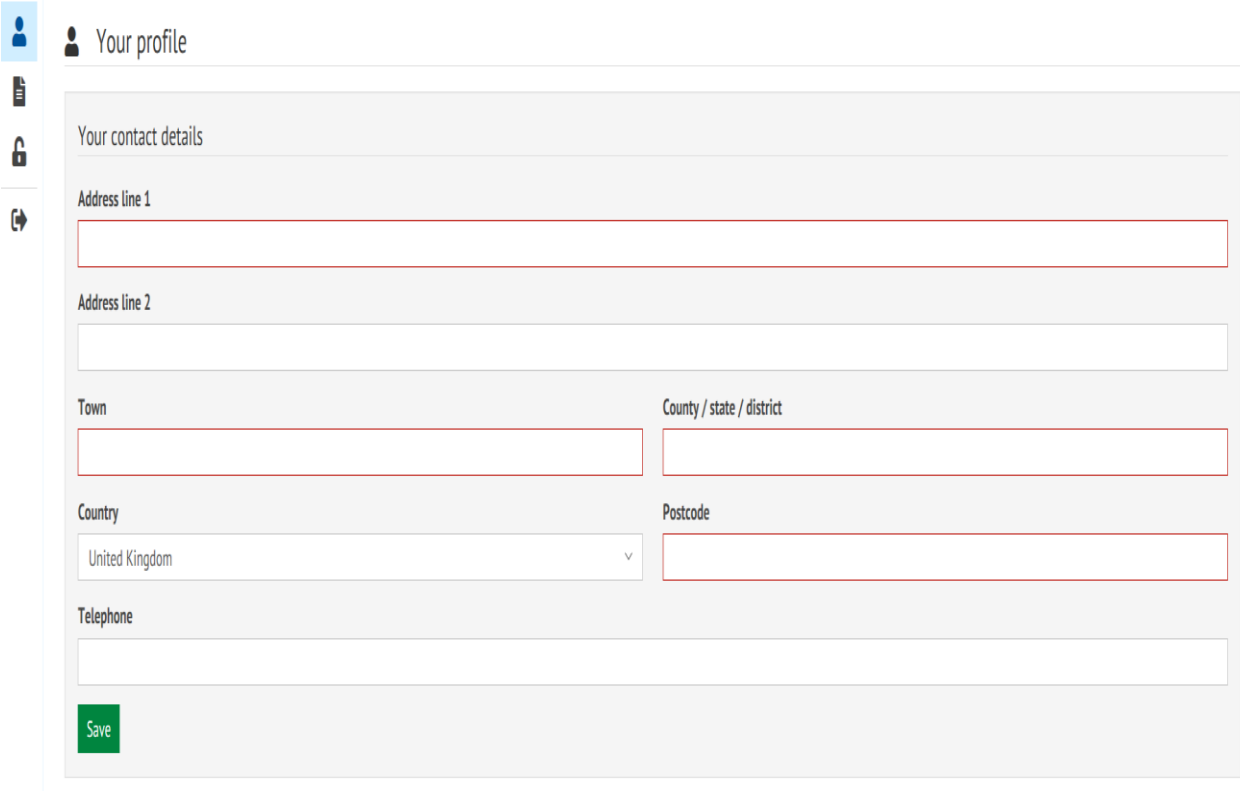
1. Click on the link in the email provided by the School/Unit.
2. Login using your email address and temporary password provided.

3. For security reasons it is advisable to change your password immediately. This is done via the **change password** padlock option at the left hand side of the form. Follow the on screen instructions. You will receive an email confirmation that your password change was successful.

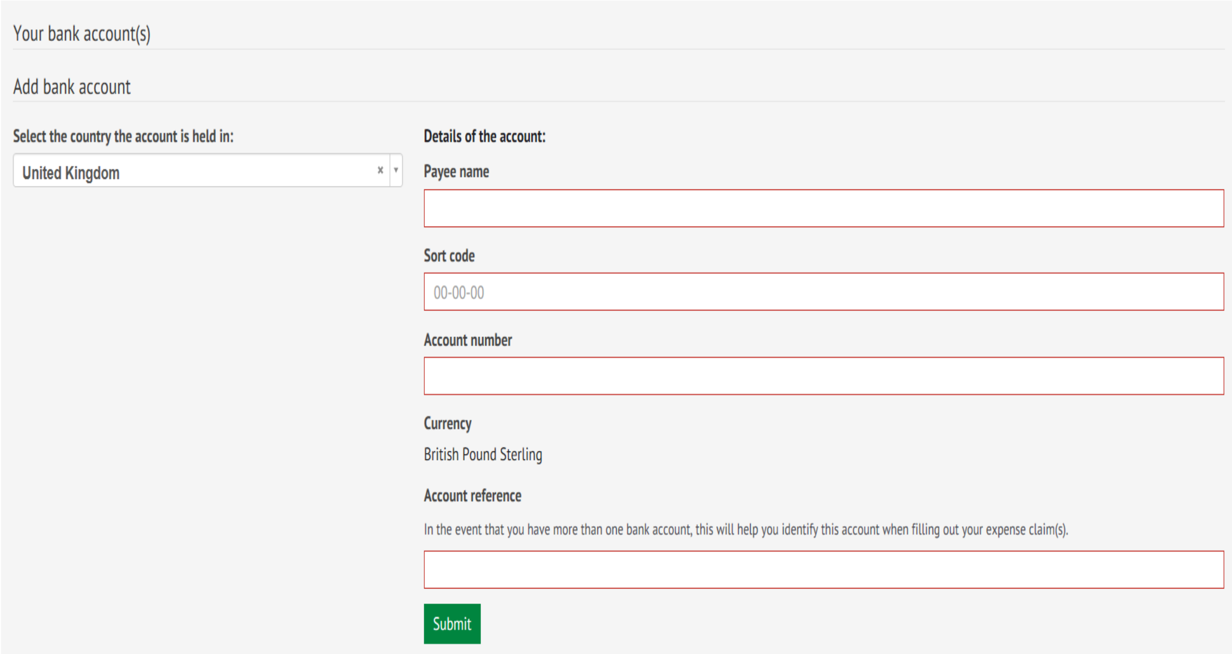


Setting up your profile

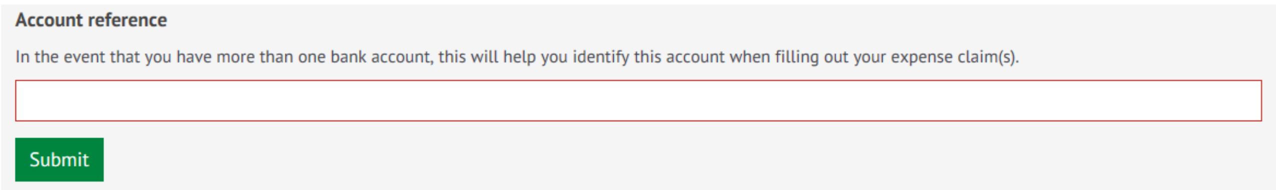
1. For first time claimants you need to set up your profile. Select the "Your Profile" icon from the side bar and enter your contact details and click **save**.



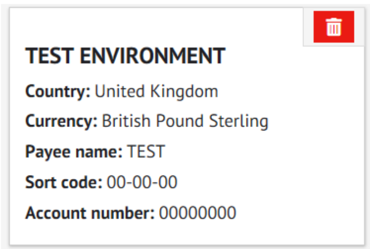
2. Bank accounts – select the country of your bank account and enter details.
   Please note if the account is outside the UK a bank charge of up to £5.00 will be deducted from your total claim.



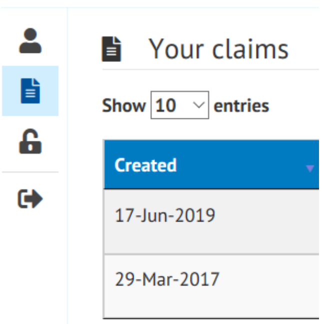
3. **Account reference** is for your information only e.g. personal account, joint account, etc.



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.
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 change 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. Receipts should be attached on a line by line basis (except for mileage, no receipt required). The easiest way to do this is by taking photos of your receipts from your mobile phone but you can upload photos on any electronic device.

If you have one image/attachment that supports more than one expense line then you only need to upload the image once (see section below).

Uploading receipts on a mobile phone

Ensure that all receipts are saved on your phone before trying to attach receipts to your claim.

Once all the information has been entered for an expense line:

1. Click the paperclip icon. 
2. Click **browse** to view your saved images on your device.
3. Select **photo library**.
4. Select the relevant image (only pdf, jpeg, png, gif images can be uploaded). Text and word documents are not permitted.
5. Click **upload.**
6. Click **close**.
   Repeat this process for all sections that require an attachment to support your claim.

Uploading receipts on a computer

Ensure that all receipts are saved on your computer before trying to attach receipts to your claim.

Once all the information has been entered for an expense line:

1. Click the paperclip icon. 
2. Click **browse...** to view your saved images on your device.
3. Select **photo library**.
4. Select the relevant image (only pdf, jpeg, png, gif images can be uploaded). Text and word documents are not permitted.
5. Click **upload.**
6. Click **close**.
   Repeat this process for all sections that require an attachment to support your claim.

Uploading one attachment for multiple sections

Once all the information has been entered for an expense line:

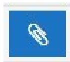
1. Click the paperclip icon. 
2. Select/tick an **existing file**.
3. Click **close**.

Please note that if a receipt relates to more than one line of your expense then this will need to be carried out per line of expense.

Updated sec5 – 20/06/2019

Uploading an email receipt/confirmation

Text and word documents are not permitted therefore the email/image needs to be saved as a pdf document type. To do this;

1. Open the email.
2. Click file, print, change printer to **scan soft PDF create**. This automatically creates the image as a pdf.
3. Click **print.**
4. Enter relevant **filename.**
5. Click **save.**
6. Click the paperclip icon within NSE system. 
7. Select the **pdf** image.
8. Click **upload**.
9. Click **close**.

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.

Deleting an attachment

1. Go to **attachments** section at the foot of the form.
2. Select the line that requires deletion.
3. Click **delete.**
4. If wrong image is chosen and needs to be reattached then click **Restore**.
   Note: this must be done within 1 day of deletion as deleted files are removed from the system.

Tracking your claim

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

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

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.