HR Self Service
Expenses – Making a claim

To make an expense claim you must first sign into HR Self Service.

https://www.st-andrews.ac.uk/selfservice

Once you have signed in, select ‘Expenses’ on the left sidebar.

Here you will see two options. ‘New claim’ and ‘History’.

**New claim**
To create a new claim, click ‘New Claim’. You will then be taken to the claim form.
The first step is to select the Position: this is your post. If you have more than one post, you need to make sure the correct post is selected as this will determine where the claim goes for authorisation.

You then need to complete the ‘Description’ and ‘Reason for claim’ fields.

Once you have done this click ‘Done’.

You will now be taken to a new screen where you will start to build the claim by adding lines for each expense.
To start just click ‘Add line’.

Select the ‘date’ for the individual expense on this line.

The ‘Group’ is the type of expense the line is for.
‘Type’ lets you pick a specific category for the expense.

Please note that the detail code is shown against each type. However, you will still need to provide the detail code when you enter the cost centre later.

You will now see more fields that let you provide the detail required for the line you are adding. The fields you see here change depending on the type of expense, so you may be asked for different information on different lines. You should complete all fields.
The full Cost Centre should be 14 characters long and made up of three parts:

- Cost Centre (4 Characters – e.g. ‘CPN1’)
- Analysis Code (6 Characters – e.g. ‘POPSXX’)
- Detail code (4 Characters – e.g. ‘6017’)

You would enter this as ‘CPN1POPSXX6017’ with no spaces.

The correct detail code for each expense can be seen next to each selection you make in the ‘Type’ dropdown list.

When you have provided all the information for the line click ‘ok’

The line will now be added to the bottom of the screen. To add another line, click ‘Add Line’ button.
Submitting a claim
Once you have added all the lines, review the form and if complete click ‘Submit’. You will be asked to confirm this.

You may encounter a warning if your claim breaches policy; the form can still be submitted, but will need to be approved by the person who authorises the claim. To help with the approval process, you can add supporting information regarding this in the description area of the form.

Click ‘OK’ to continue or ‘Cancel’ to change the form.

Once you have done this you will see confirmation that the form has been submitted.
The claim has now been submitted and awaits approval or rejection by your line manager and Salaries.

You will receive an email confirming when your claim has been approved or rejected.

**Print Summary Sheet**
So you can send your paper receipts to Salaries for your claim to be authorised you need to print a paper copy of the summary sheet. To do this click ‘Print Summary’.

Attach this printout to your receipts and send this to Salaries using internal mail.
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Submitting your receipts:

You **MUST** print a copy of this summary and send it to Salaries along with all the receipts relevant to the claim. If you don’t do this your claim will not be processed.