HR Self Service
Expenses
Making a claim against Research grants

Claims made from research grants
To comply with funders’ terms and conditions, it is mandatory that you provide full details of your claims is to allow comprehensive, auditable, reporting by Finance.

To make an expense claim against a research grant 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.

**TO AVOID REJECTION OF RESEARCH GRANT CLAIMS THE FOLLOWING INFORMATION IS MANDATORY:**

Within the ‘Reason for Claim field’ you should provide:

- Name of Meeting/Conference/Workshop etc,
- Town and Country of Meeting/Conference/Workshop etc,
- Dates of Meeting/Conference/Workshop
- Reason for Meeting/Conference/Workshop, eg Present Paper etc.

If claiming for more than 1 travel mission, it is advisable to make separate claims for each trip or ensure it is clear which costs apply to each trip.
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. Select ‘**Research Grant**’.

‘**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.

**Claim Information – Description field**

For research grant claims, the information provided in the description box **MUST** provide the basis for all ‘types’ of costs. If more than one trip is being claimed for, it is advisable that **separate claims are made for each trip**. If you do not make separate claims, you must ensure that it is clear which trip is referred to within the description field.

Examples of what you would put in the description field for the different types are:

**Accommodation**

‘Berlin, 2 nights , 4-5 August 2017, London 1 night 13th August 2017

**Car hire**

‘Berlin, 3 days 3-5 August 2017”

**Conference course fees**

‘Berlin, 3-5 August 2017 fee for a n other

**Entertaining** (see staff expenses policy for guidance)

‘Berlin 3rd August 2017

Incidental allowance, incidentals with receipt, lunch allowance, lunch and dinner allowance, meals with receipt
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‘Berlin-3rd 4th and-5th August 2017’

**Mileage** (see staff expenses for guidance)

‘St Andrews to Edinburgh airport for travel to Berlin 3-5 August 2017’

**Other**

Description of item and relation to research grant (and trip if applicable)

**Parking**

‘Parking at Edinburgh airport for travel to Berlin 3-5 August 2017’

**Telephone calls**

‘Berlin 3rd August 2017’

**Travel** (Bus, Ferry, Flights, Rail, Taxi)

‘From xx to xx in connection with travel to Berlin 3-5 August 2017’
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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.

A RESEARCH GRANT CLAIM COST CENTRE WILL BEGIN WITH ‘S’ (eg. SXXXXERCXX6017). The Principal Investigator or of the Research Grant or School Administrator of will be able to provide this code.

Receipts
If it is needed for the type of expense you are claiming you MUST attach a copy of the receipt to the claim. If you do not do this the claim will be rejected. It is important to ensure that the receipts you provide are of good quality and legible.

To add a copy of the receipt, click the ‘Add Attachment’ button against each line you add.

Select the receipt from the location you saved the copy.
Once added you will see the receipt attached to the claim.

Lost receipts
If an expense has been incurred and the receipt subsequently lost then the cost should be charged to a School/Unit/Individual code as appropriate. It cannot under any circumstances be coded to a research grant.

Adding the expense to the claim
When you have provided all the information for the line and attached the receipt, click ‘ok’

The line will now be added to the bottom of the screen. To add another line, click ‘Add Line’ and repeat the process.
Submitting a claim

Once you have added everything you wish to claim, review the form and 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 the Salaries team.

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