Claiming Expenses via SGSAH – Illustrated Guide

This guide is intended for researchers who <u>do not</u> attend The University of Glasgow.

University of Glasgow students should send expense claims via MyCampus as described in the guide on the page found here: link

To claim your expenses, you will need to send us 3 things:

- A completed expense form
- A copy of your receipts or tickets
- A copy of your banking information

Expense Form:

Please see an example of a correctly completed sundry expense form below, with the fields you need to fill marked in red. Please do not fill out other parts of the form, they are for us.

This form can be found on the SGSAH website here.

If you do not have a UK bank account, you should download the applicable Foreign Sundry Form available on the University of Glasgow website here.

Sundry Payment Form – UK Bank Account

<u>**University of Glasgow - Sundry Payment Form 30 Day Terms**</u>

<u>**Please note the following when completing this Sundry Payment Form:**</u>

- Please complete all relevent sections. **This form must be typed - handwritten forms will be returned.**

- Use the checklist tab, to ensure all information is accurately completed

- This form is for **Internal Use only**, and **should not be distributed to external parties for completion**

- Please ensure accuracy when completing all input fields

- Please ensure all relevant back up is attached (e.g invoice, conference registration form, receipts, travel tickets, bank details etc....)

<u>**Once the form is completed, please send form and accompanying back up in one PDF file to:**</u>

finance-accountspayable@glasgow.ac.uk

(please note any Forms sent via post, will be rejected)

Internal Use Only - Department must complete	
Department N	
Contact name :	
Email Address:	
Date Comple	

<u>**SUNDRY CHECK LIST - MUST BE COMPLETED BEFORE SENDING THIS FORM**</u>

1	**Beneficiary details completed**	☐
2	**Bank Details attached (see options for back-up in instructions)**	☐
3	**Beneficiary name matches name on bank account**	☐
4	**Account and Sub-Project coding added**	☐
5	**Back-up required eg receipts attached**	☐

Date of Claim   23.11.23

Beneficiary's Account Name	Joe Bloggs
Beneficiary Address	123 Town Street
(Home address which was used at time of	Perth
opening account)	PH1 PH1
Country	United Kingdom
Beneficiary Bank's Name	Nationwide
Beneficiary Sort Code	12-34-56
Beneficiary Account Number	12341234

FINANCE OFFICE CODING DETAILS * MUST BE COMPLETED BY DEPARTMENT*

ACCT   **SUB PROJECT**

**VAT Code**   **AMOUNT IN FIGURES**

Total

Description - (max 30 characters)

Joe Bloggs - Year 1 Welcome Event - 13/11/23

*This will appear in the monthly printouts description field*

Receipts

There are multiple forms of acceptable receipts and it will vary based on your purchase. Some sites or apps such as Trainline allow you to see 'expense receipts' for travel purchases, and these are ideal, however a clear image of a ticket also is acceptable. We should be able to see a **price** and ideally a **date** on your receipt. As long as those are there, then it should be acceptable as long as the purchase is something we can reimburse. You can add as many receipts as you need to your claim.
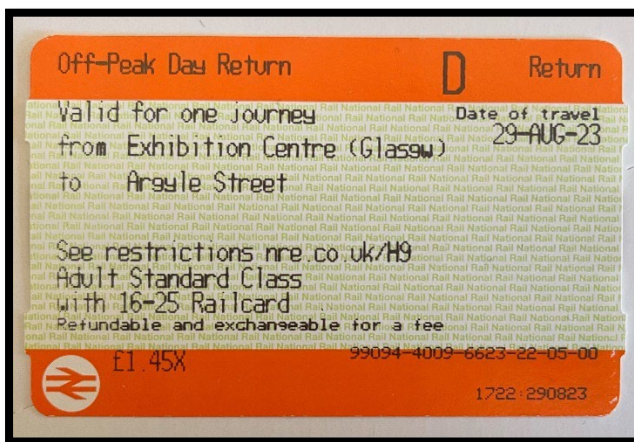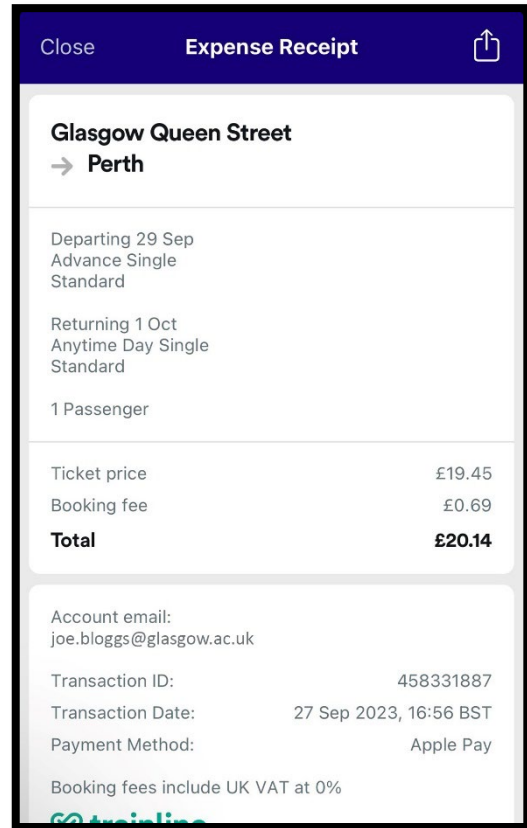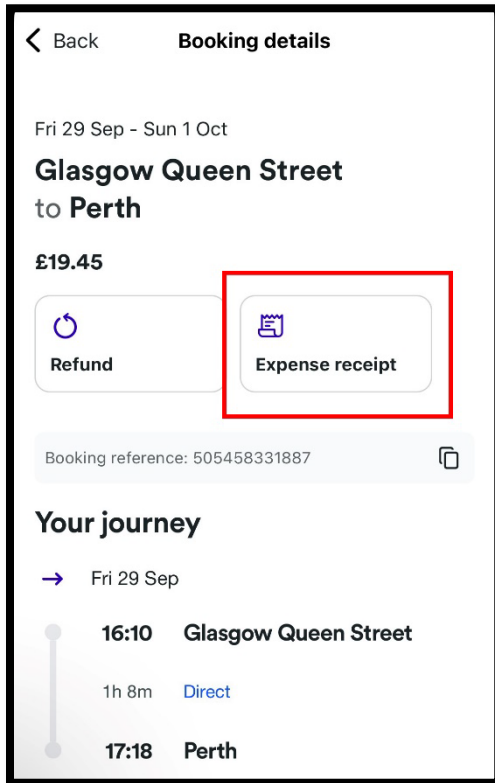

Both of these examples would be acceptable as they clearly show prices, destinations and dates.

Booking confirmations and clear photos of physical receipts are also acceptable. If you do take photos of physical receipts or tickets then multiple photos of single items are preferable to one image that includes every ticket or receipt – for clarity reasons.
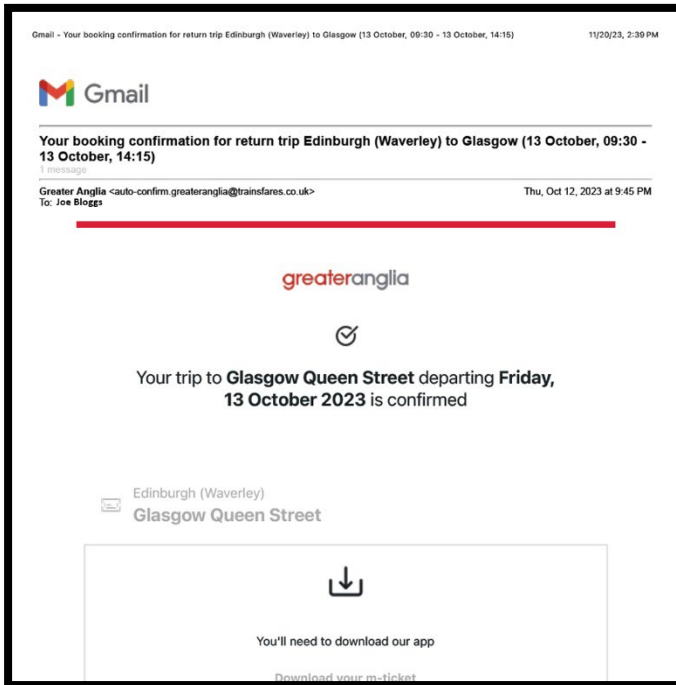

Unacceptable Forms of Receipt:

Banking transactions do not constitute a receipt and they cannot be used as a form of proof. We will always encourage you to get physical or digital receipts whenever possible and to take photos of them in case you lose them.
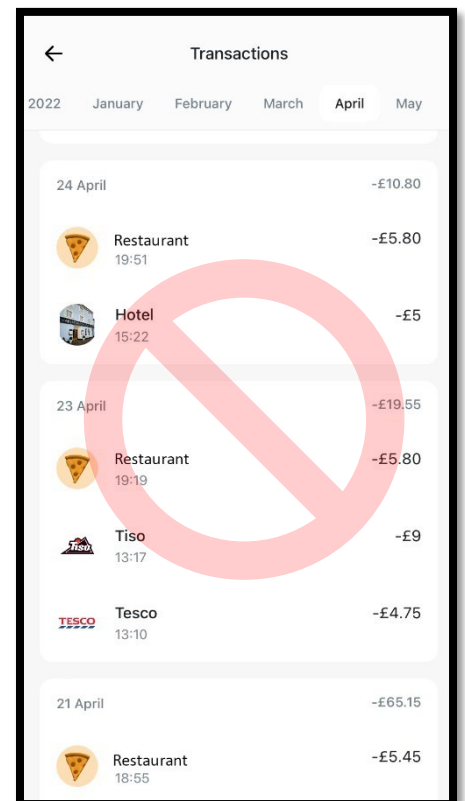
Banking Details

We require an image that displays: your **name**, your **bank's name or logo**, your **sort-code** and your **account number**. These account details should match the sort-code and account number you added to the form. We understand that sharing your banking details might worry some people but you may redact anything else you don't wish us to see.

Below you'll see various forms of examples of acceptable images you can send. Anything from the landing page on your banking app, to the header of a bank statement can be acceptable as long as it contains the four bits of information we ask for.
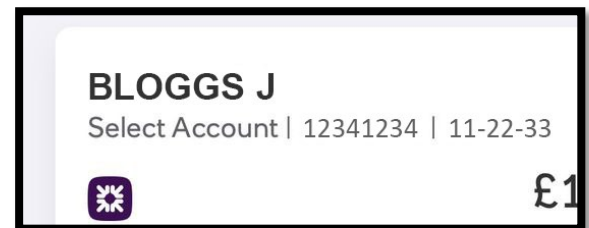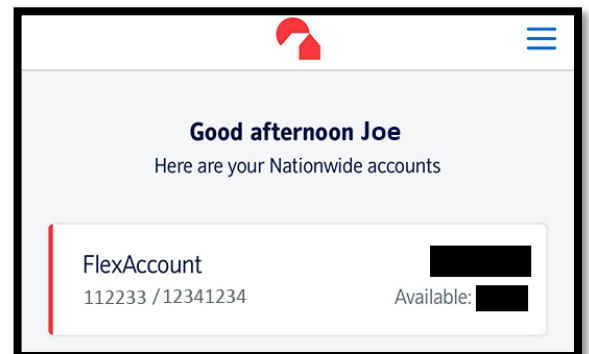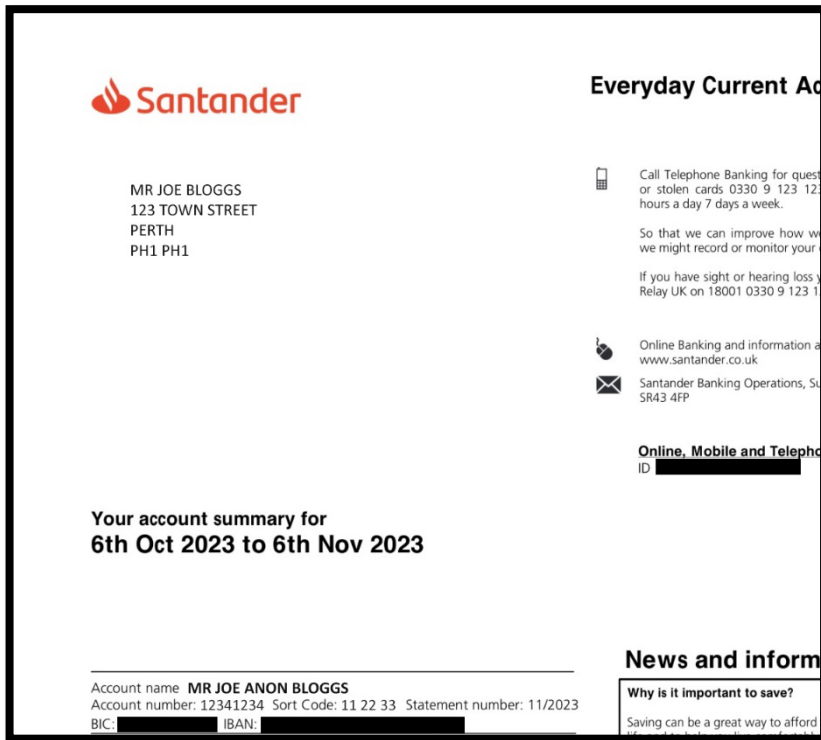
Unacceptable Banking Details:

You cannot simply tell us this information in your email, or write it down somewhere. We need an image taken from an official source such as a banking app or website or a paper bank statement.

We also do not retain this information after we have sent your claim to University of Glasgow's finance department so you will need to include it each time.
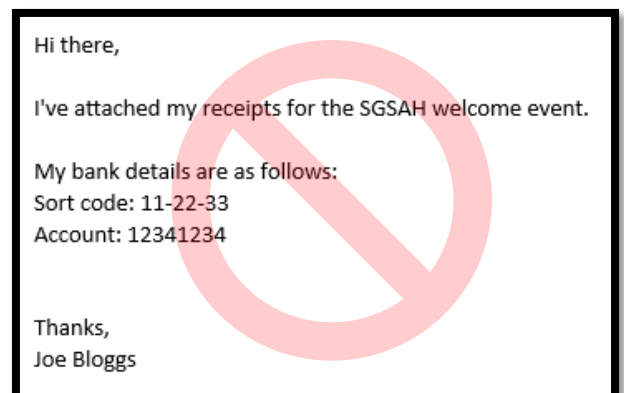
With those three parts finished, your email attachments should look something like this:
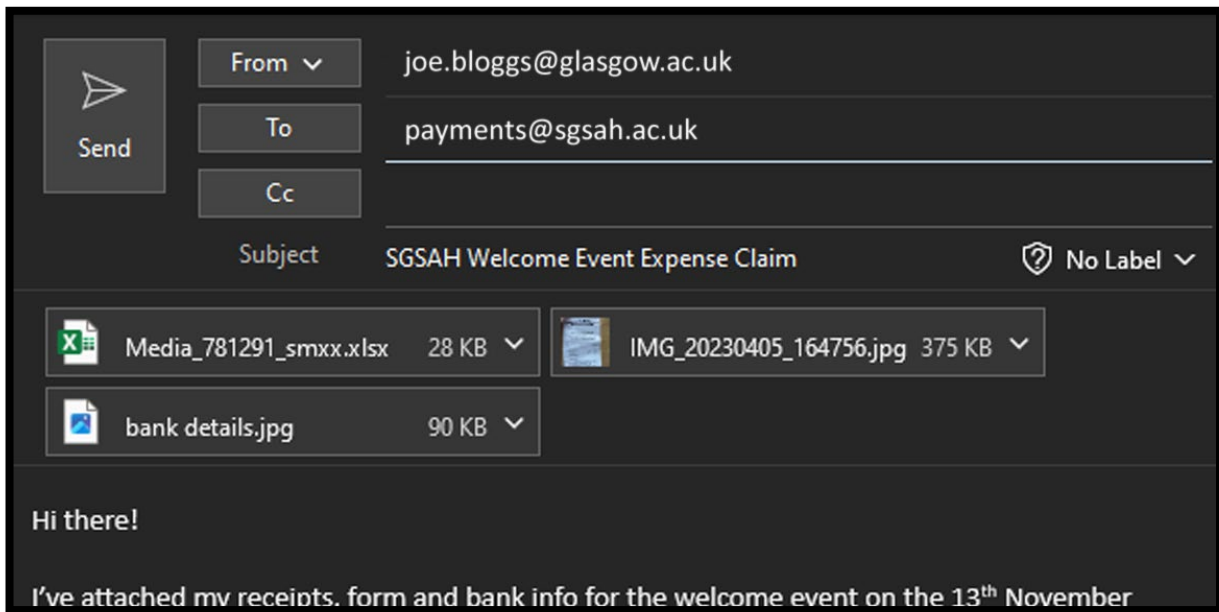
Send your completed claim to: **payments@sgsah.ac.uk**

FAQ's

How do I claim expenses for driving to an event?

We are unable to reimburse things such as receipts for petrol purchases, but instead we require you to clearly tell us your postcode of origin, the postcode of your destination and whether or not it was a return trip. From this we calculate your mileage and reimburse you based on that outcome.

> Hi there!
>
> I've attached my form and bank details for the Welcome Event on the 13th November, I drove to the event from PH1 PH1 to EH1 1JF, and it was a return trip.
>
> Many thanks

What if I don't have receipts?

Always keep (and take photos of) your receipts/tickets when travelling to and from SGSAH events!

If you do not have receipts, it may be unlikely that we'll be able to reimburse you but please email us at payments@sgsah.ac.uk and we'll see if we can help.

How long does it take to be reimbursed?

It usually takes 3-4 weeks from when we submit your claim to the University of Glasgow, however we are a small team so please understand this may not happen immediately, especially after large events with many claims to process.

I paid for my own accommodation, can I reimburse it?

Due to the University's policies, we can only reimburse a set amount relating to accommodation. We would strongly encourage you to contact us in advance of any events in which you believe you will require accommodation, as we can organise it on your behalf without requiring any payment from you.

Do I need to convert my form and attachments into a PDF before submitting it?

No, this is something that SGSAH have to do before we send the form to University of Glasgow finance. It's often easier for us to edit your form to add our information when it's an Microsoft Excel file, and on occasion, students who have converted their form into a PDF have formatted it incorrectly and the time it takes to correct these errors may add to the wait for your reimbursement.

If you have any other questions relating to expenses feel free to email: **payments@sgsah.ac.uk**