

## BEFORE YOU START

### Check what's claimable

- Read the [Relocation Scheme Policy](#) to understand what can and cannot be claimed for.
- Travel, accommodation and subsistence limits are listed in the [Expenses Policy](#) – only actual costs incurred can be claimed – there are no day rates.
- The University has a separate [Visa Reimbursement Scheme](#) – do not use the T1 expenses form to claim back any visa costs relating to your relocation.

### Prepare the receipts

- Receipts must be provided – invoices and booking confirmations are **not** acceptable. The receipt must confirm the date the cost was paid.
- Scan any paper receipts and store the images ready to upload to your claim – .jpeg and .heic formats cannot be used.
- Mileage claims don't need receipts.

### Know which University budget to use

- Check which budget your relocation costs are to be claimed from – a separate relocation budget may have been set up in your name or your costs may be part of a research project.
- Use the [T1 Code Dashboard](#) to look up codes – enter your surname in the search field to find your own code.
- Check with [your PS or Faculty Financial Planning and Reporting Team](#) which code to use if you're unsure.

### Timescales and Payment

- Claim within three months of the date of the payment and always by the end of the tax year following the start of your new appointment.
- Claims approved by end of each Tuesday are paid by bank transfer into UK bank accounts on the Friday. Overseas bank accounts will take longer.
- Payments are made to the same bank account as your salary.

## FURTHER HELP & SUPPORT

### Relocation Policy

<https://www.exeter.ac.uk/staff/new/relocation/scheme/>

### Expenses Policy

[www.exeter.ac.uk/finance/policies/expenses/](http://www.exeter.ac.uk/finance/policies/expenses/)

### Visa Reimbursement Scheme

<https://www.exeter.ac.uk/staff/employment/righttowork/visareimbursementscheme/>

### Relocation queries

[humanresources@exeter.ac.uk](mailto:humanresources@exeter.ac.uk)

### Expenses T1 training course

<https://www.exeter.ac.uk/staff/learning-and-development/courses/coursedetail/index.php?code=10701>

### Help with T1 and approval issues

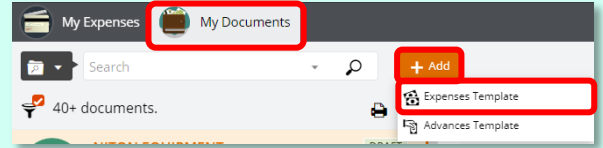
[financehelpdesk@exeter.ac.uk](mailto:financehelpdesk@exeter.ac.uk) 01392 726981 [Book a quick screenshare](#)

## T1 EXPENSES – [Login to T1 here](#)

**1** On the 'My' page, open the 'My Travel and Expenses' function:



**2** Click on the 'My Documents' tab, then click 'Add' and select the 'Expenses Template':



**3** Enter today's date and reason for the claim:

**Add Expense Document**

Cancel Save

**Details**

User \*  
FS058 (Freddi Smith)

Description \*

Reason \*

Date \*

Expense Reason

Settings

Save this section once completed

Defaults to you – select other person's username if completing on behalf of someone else

Enter reason for claim e.g.  
*Prof F Smith Relocation Costs Spain to Exeter February 24*

Copy of the field above – enter more details here, if needed

Enter today's date

Always leave blank

Don't change or add anything here

**4** Next, click the 'Expenses' tab to start listing the individual elements of the claim:

**Document Details**

Approved 0.00  
Total Amount 143.00

**Allowances**

Mileage Lease Vehicle Total 143.00

**Expenses**  
None

**Expenses**

+ Add

No expenses

Postage

Relocation

Room Hire

Click 'Add' then select 'Relocation' from the drop-down list – don't use any of the other options.

Read the [Relocation Scheme](#) policy to check what can and cannot be claimed for.

## 5 Add details about the first expense in the form that now appears:

Save this information once all fields have been entered and receipts attached

### Expenses

#### Relocation Line

#### Details

Expense Date \*  
01-Feb-2024

Enter the date this item was paid for - this is the date on the receipt

Cancel Save

Claim Type \*

Select **EXPENSE** to be paid into claimant's bank account

Company Name \*

Name of vendor/supplier as shown on receipt

Country of Purchase \*

Select where item was purchased

Expense Item \*

Select type of relocation cost e.g. legal, travel, removal

Narrative \*

Give full details about this item - dates, what was purchased, who was involved etc.  
e.g. *Removal lorry costs Edinburgh to Exeter Feb 2024*  
or *Solicitors fees for house purchase Jan 2024*

Receipts relating to EU grants?

Leave blank unless using an EU grant code (send originals to EU team)

Do you have a receipt showing UK VAT no? \*

**YES** = receipt shows UK VAT amount, rate and VAT number of supplier  
**NO** = receipt does not show UK VAT i.e. train ticket

Reason for no UK VAT receipt \*

If **NO** to UK VAT receipt field above, select reason why not from drop-down menu e.g. lost, credit card receipt only etc.

Currency Code \*

GBP (British Pounds Sterling)

Defaults to GBP - use the drop-down to change if expense was incurred in a different currency.

Total (Gross)

Can overtype exchange rate to amend it if needed.

Charge Code \*

Total amount to be reimbursed for this cost

#### Attachments

Enter the six-digit version of the relocation budget code - [look up TI codes here](#)

Add the receipt image + any other documents supporting this expense here:

- .jpeg and .heic file formats cannot be used.
- Invoices and booking confirmations/screenshots are not acceptable.
- The receipt must confirm the date, amount and vendor's details.
- UK receipts must show the vendor's VAT number if VAT was charged.

+ Add

## 6 Repeat steps 4 and 5 to add any more relocation expenses to be submitted together in this claim:

### Allowances

Mileage Lease Vehicle Total 143.00

### Expenses

None

### Expenses

+ Add

Postage

Relocation

Room Hire

Always select 'Relocation' from the drop-down list - don't use any of the other options.

## 7 Check details then submit for approval:

Select 'Submit' when all lines have been added and claim is ready for approval

Check the expense type says 'RELOCATION' on every line in the claim

Change any incorrect details using 'Edit' or delete this line using drop-down icon

## 8 Check who will approve the claim:

Select this tab - it appears only once claim has been submitted for approval

Highlighted line is the current approval pool location of the claim.  
Some claims will need to be checked by the VAT team - if so, their name will appear here.  
Budget approval is the final stage - this is shown when the approval pool number or budget holder's name appears here.

To find out approval pool names, use the [TI Resource Pools](#) function - enter the pool number shown in your claim in the search field  
The approval task is emailed to all pool members simultaneously. First to action the task is recorded as the approver on the expense claim.

## 9 View all claims:

Claim's current status

Open the filter menu by clicking the orange filter icon. Then select 'Clear all' to see all past and present claims

- DRAFT** = started but not submitted for approval
- CLAIMANT REVIEW** = created on claimant's behalf and with claimant to check
- VAT REVIEW** = with VAT team for checking
- APPROVE EXPENSES** = with budget approver for checking
- MAKE A REQUEST** = rejected and returned to user to amend then resubmit
- COMPLETED** = claim approved and payment will be paid to salary bank account

### Payment information:

- Claims approved by end of Tuesday and showing a 'COMPLETED' status are paid by bank transfer into the same bank account as University salary.
- Payments are issued weekly each Wednesday and arrive in UK bank accounts on the Friday. International payments can take longer. Remittance details are emailed to claimant on the Wednesday to confirm payment is on its way.