

HOW TO CLAIM

If currently enrolled – use the University’s finance system, called T1, to create and manage your claim

If interrupted or no longer enrolled – use a [GBP or International Payment Request Form](#), not T1

WHAT YOU CAN CLAIM

See the [University’s Expenses Policy](#) for details of what can and cannot be claimed

BUCS fixtures and events have their own claim rates – see [BUCS mileage rates](#). Select the claim type as Travel UK and enter the fixed cost allowed for that venue - DON’T claim mileage for BUCS travel claims

BEFORE YOU START YOUR CLAIM

Make sure your bank details are up to date in [iExeter](#) as this is the account your claim will be paid into:

- To add a UK bank account, see [Add bank details to iExeter](#).
- To add an overseas bank account, complete the [International Bank Account Information](#) form and email it to accountspayableenquiries@exeter.ac.uk. Include 'International Bank Details + [Student name] + [Student number]' in the email title.

Check if you can already [login to T1](#) with your University username and password. To set up T1 access - ask a member of staff such as your tutor / research supervisor / college admin team / BUCS coordinator to fill in a *T1 New User Access Request* form on your behalf. Access can take up 2-3 days to get set up. [Form link and instructions](#)

Know which T1 cost code to use -

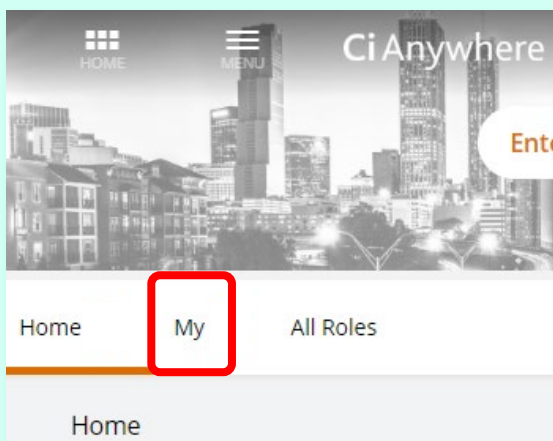
- Look up a cost code by name or owner with the [T1 Code Dashboard](#) e.g. search *BUCS* to see all the BUCS cost codes (each club has its own code)
- Or ask the event organiser which cost code to use

Claim within three months of event and always by academic year end, each 31st July

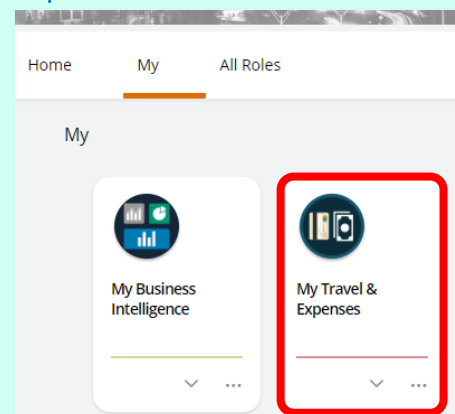
Scan your receipts as the images will need to be attached to the claim (NB mileage claims don’t need receipts)

HOW TO USE T1

1) [Login to T1](#) and click the ‘My’ link:



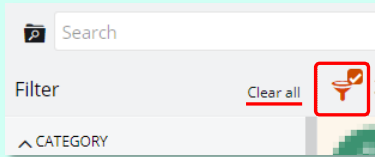
2) On the ‘My’ page, click the ‘My Travel and Expenses’ icon:



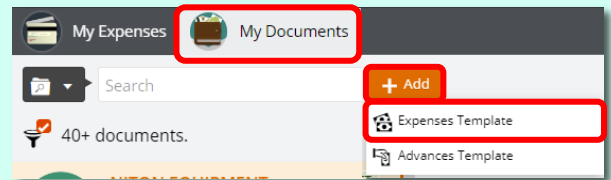
STUDENT EXPENSE CLAIMS

3) See any previous claims by removing the filter:

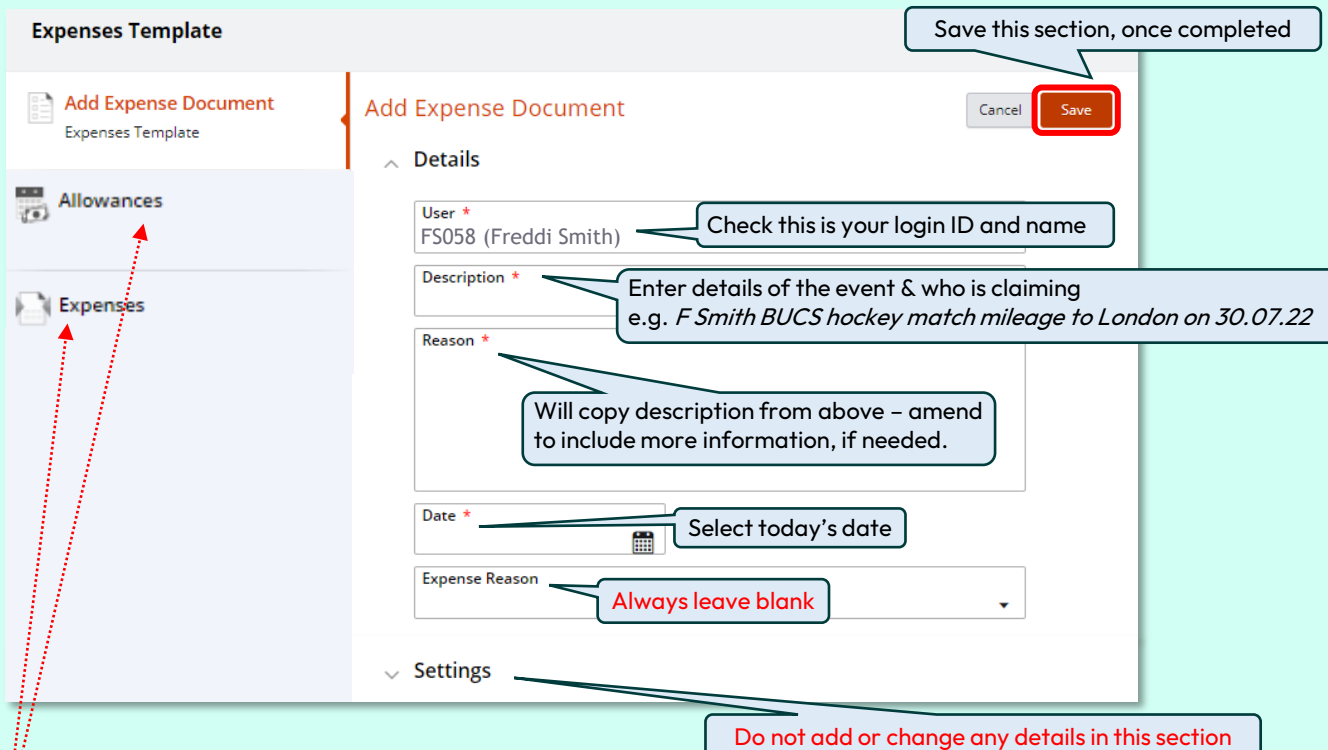
- Click the filter icon, top left
- Select 'Clear all'
- Click to filter icon again to close menu



4) To create a new claim, click on 'My Documents' tab, then 'Add', then 'Expenses Template':



5) Enter the date, details of the event and the cost code then 'Save' the information:



Expenses Template

Save this section, once completed

Add Expense Document
Expenses Template

Allowances

Expenses

Add Expense Document [Cancel] [Save]

Details

User * FS058 (Freddi Smith) *Check this is your login ID and name*

Description * *Enter details of the event & who is claiming e.g. F Smith BUCS hockey match mileage to London on 30.07.22*

Reason * *Will copy description from above - amend to include more information, if needed.*

Date * *Select today's date*

Expense Reason *Always leave blank*

Settings *Do not add or change any details in this section*

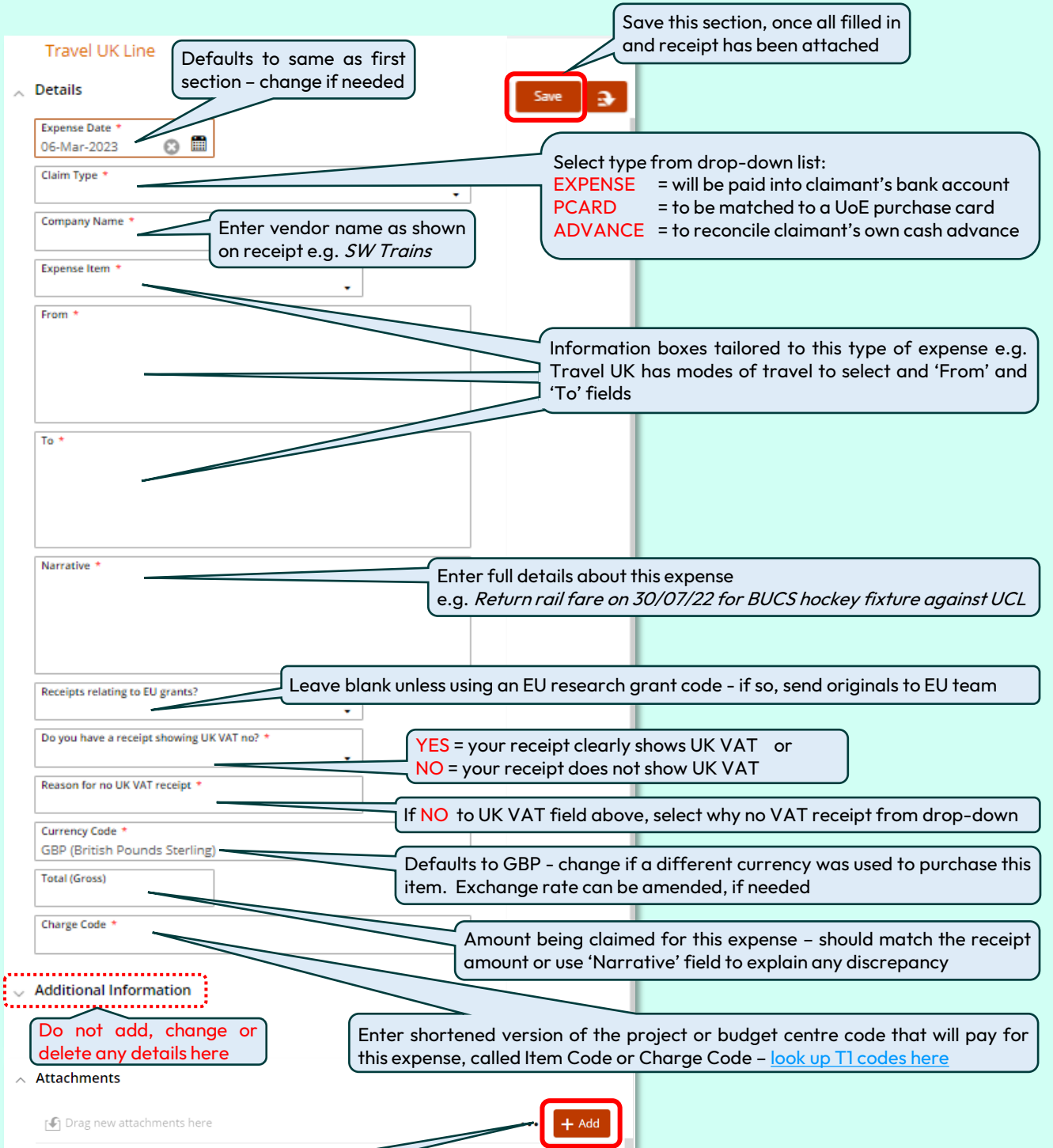
6) Now click the tab for the type of expense being claimed, then 'Add' the relevant type of expense:

- Select 'Allowances' for mileage claims (except BUCS match mileage)
- Select 'Expenses' for all other types of claim e.g. accommodation, subsistence etc. Zoom out web browser to 80% if full list not shown
- For BUCS match mileage claims, select 'Expenses' > 'Travel UK'



STUDENT EXPENSE CLAIMS

7) EXPENSES TAB: enter details about this expense and add its receipt. Then 'Save' these details:



Travel UK Line

Defaults to same as first section - change if needed

Save this section, once all filled in and receipt has been attached

Details

Expense Date *
06-Mar-2023

Claim Type *

Company Name *
Enter vendor name as shown on receipt e.g. *SW Trains*

Expense Item *

From *

To *

Information boxes tailored to this type of expense e.g. Travel UK has modes of travel to select and 'From' and 'To' fields

Narrative *
Enter full details about this expense
e.g. *Return rail fare on 30/07/22 for BUCS hockey fixture against UCL*

Receipts relating to EU grants?
Leave blank unless using an EU research grant code - if so, send originals to EU team

Do you have a receipt showing UK VAT no? *
YES = your receipt clearly shows UK VAT or
NO = your receipt does not show UK VAT

Reason for no UK VAT receipt *
If NO to UK VAT field above, select why no VAT receipt from drop-down

Currency Code *
GBP (British Pounds Sterling)
Defaults to GBP - change if a different currency was used to purchase this item. Exchange rate can be amended, if needed

Total (Gross)

Charge Code *
Amount being claimed for this expense - should match the receipt amount or use 'Narrative' field to explain any discrepancy

Additional Information

Do not add, change or delete any details here

Enter shortened version of the project or budget centre code that will pay for this expense, called Item Code or Charge Code - [look up T1 codes here](#)

Attachments

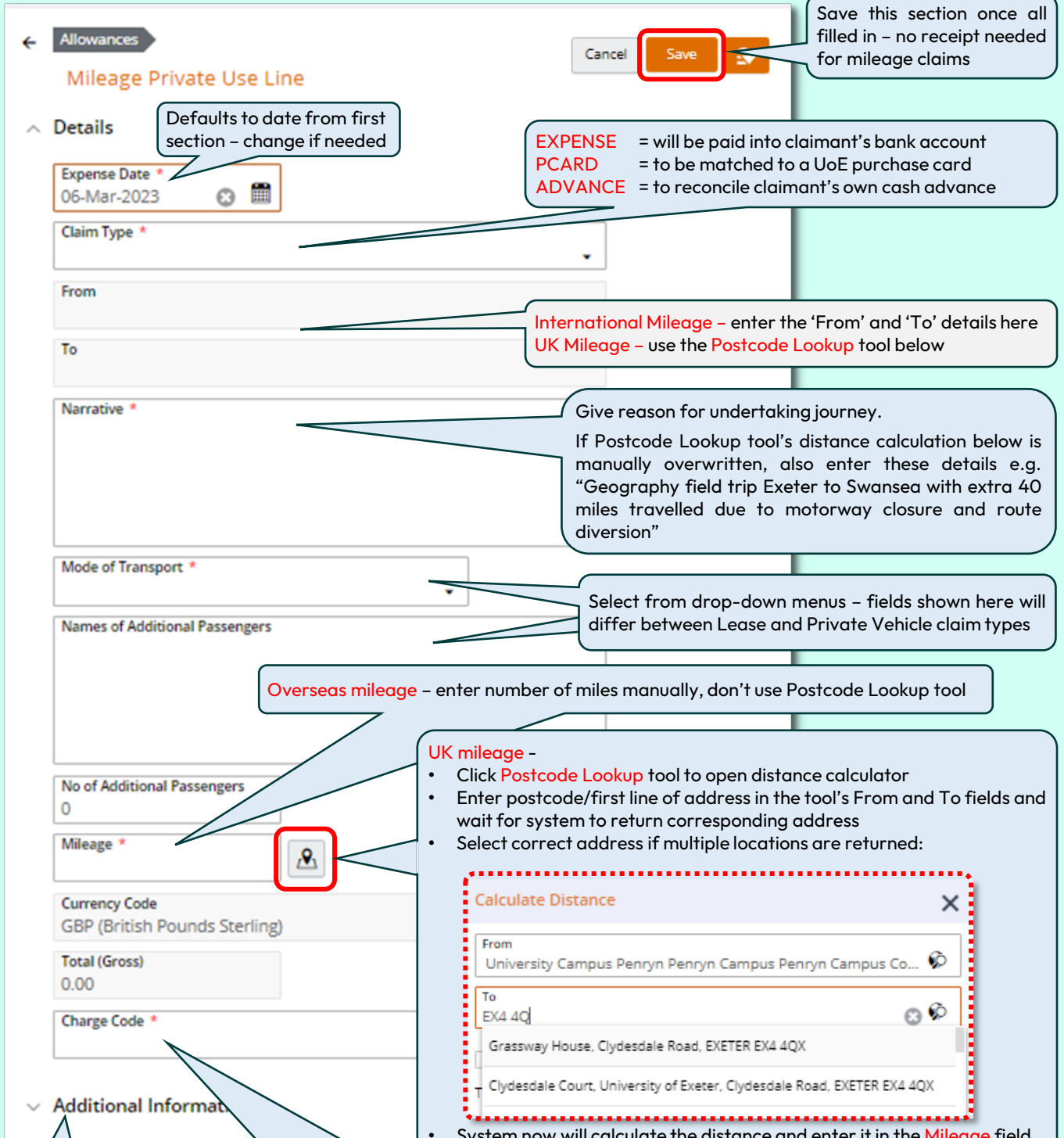
Drag new attachments here

+ Add

Add the receipt image + any other docs supporting the claim here - .jpeg and .heic file formats cannot be used

STUDENT EXPENSE CLAIMS

8) ALLOWANCES TAB: Add details about the mileage in the form that now appears:



Allowances Cancel Save

Mileage Private Use Line

Details

Expense Date *
06-Mar-2023

Claim Type *

From

To

Narrative *

Mode of Transport *

Names of Additional Passengers

No of Additional Passengers
0

Mileage *

Currency Code
GBP (British Pounds Sterling)

Total (Gross)
0.00

Charge Code *

Additional Information

Save this section once all filled in - no receipt needed for mileage claims

Defaults to date from first section - change if needed

EXPENSE = will be paid into claimant's bank account
PCARD = to be matched to a UoE purchase card
ADVANCE = to reconcile claimant's own cash advance

International Mileage - enter the 'From' and 'To' details here
UK Mileage - use the **Postcode Lookup** tool below

Give reason for undertaking journey.
 If Postcode Lookup tool's distance calculation below is manually overwritten, also enter these details e.g. "Geography field trip Exeter to Swansea with extra 40 miles travelled due to motorway closure and route diversion"

Select from drop-down menus - fields shown here will differ between Lease and Private Vehicle claim types

Overseas mileage - enter number of miles manually, don't use Postcode Lookup tool

UK mileage -

- Click **Postcode Lookup** tool to open distance calculator
- Enter postcode/first line of address in the tool's From and To fields and wait for system to return corresponding address
- Select correct address if multiple locations are returned:

Calculate Distance ✕

From
University Campus Penryn Penryn Campus Penryn Campus Co...

To
EX4 4Q

Grassway House, Clydesdale Road, EXETER EX4 4QX

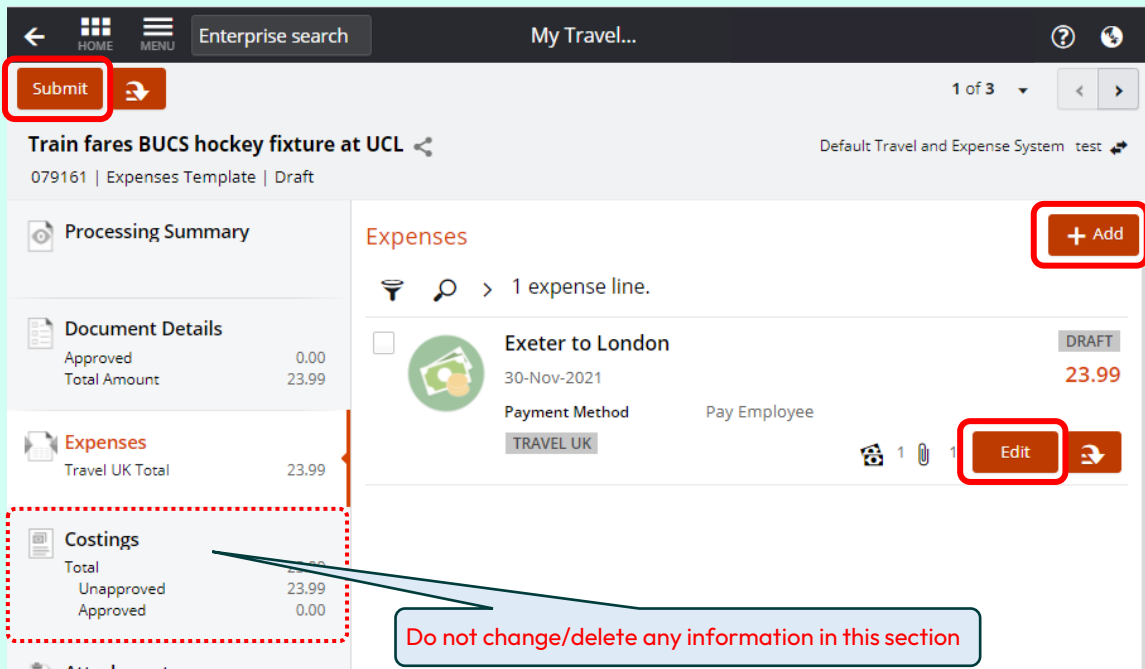
Clydesdale Court, University of Exeter, Clydesdale Road, EXETER EX4 4QX

- System now will calculate the distance and enter it in the **Mileage** field.
- The mileage calculation can be manually overwritten if needed
- The greyed-out 'From' and 'To' fields on the form will now update

Section will auto-populate - don't change or add anything

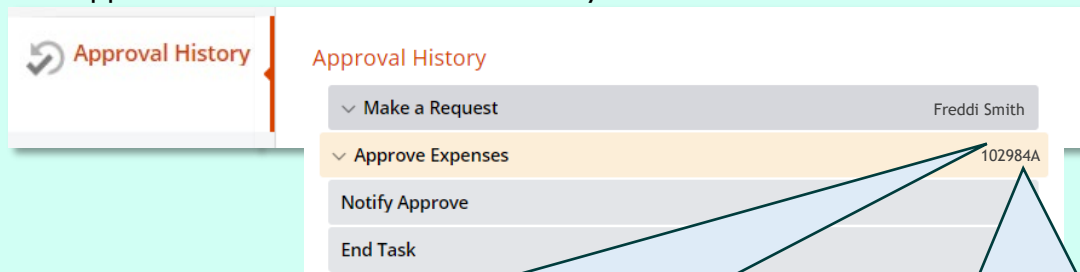
Enter shortened version of the project or budget centre code that will pay for this expense, called Item Code or Charge Code - [look up T1 codes here](#)

- 9) Use the 'Add' button to include any more expenses and their receipts for this same event, if needed
 Check each line's summary information and 'Edit' if any mistakes have been made
 Click 'Submit' when all expenses have been added and claim is ready to be approved



Do not change/delete any information in this section

- 10) After submitting, click on the 'Approval History' tab to view your claim's progress. Your claim may need more than one type of approval. A number means your claim has gone to the pool of people who approve items for the cost code used in your claim. Click the line to see date and time details:



Could also show:

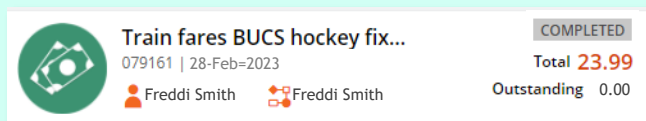
- VAT Team (if the VAT details need to be checked before approval)
- Approval pool number (group of approvers for cost code used in the claim)
- Name of staff member approving this claim

To find out who is in this approval pool – enter the pool number in the [Resource Pools](#) function

- 11) Once all approvals have been done, your claim status will change to 'Completed' and you will receive email confirmation of this.

Claims approved by end of each Tuesday are sent to UK bank accounts by BACS each Wednesday and take 2 days to arrive.

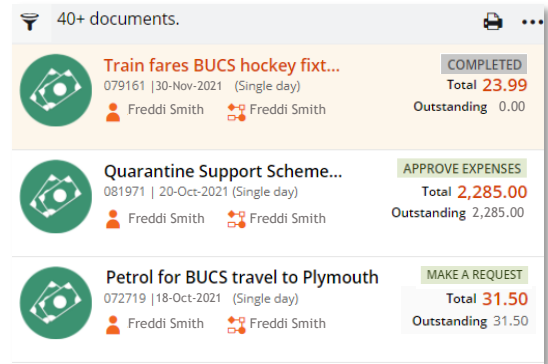
Claims to non-UK banks are sent by Convera and take 3-7 days to arrive.



CLAIM STAGES

Your claim has a number of stages it can pass through – the status updates each time it progresses to the next stage. Remove the filter (see step 3) to see all your claims and their statuses:

- DRAFT** = claim started but not yet submitted for approval
- VAT REVIEW** = claim has gone to the VAT team to be checked
- APPROVE EXPENSES** = claim has gone to the cost code approvers for final checks
- MAKE A REQUEST** = an approver has rejected your claim and returned it to you to amend
- COMPLETED** = claim has been approved and payment will be sent to your bank account shortly



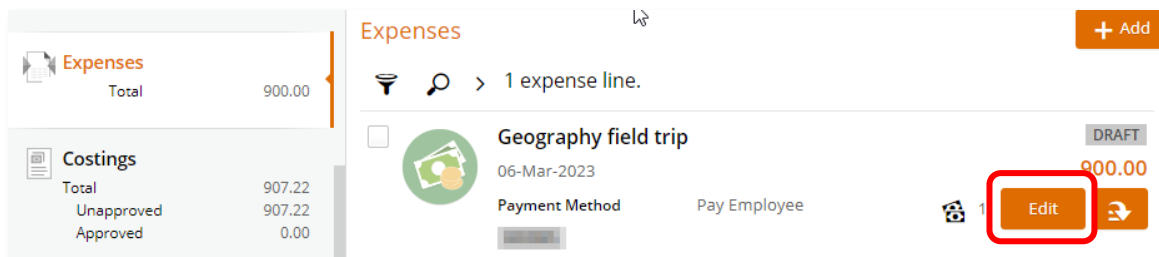
Document	Status	Total	Outstanding
Train fares BUCS hockey fixt... 079161 30-Nov-2021 (Single day) Freddi Smith	COMPLETED	23.99	0.00
Quarantine Support Scheme... 081971 20-Oct-2021 (Single day) Freddi Smith	APPROVE EXPENSES	2,285.00	2,285.00
Petrol for BUCS travel to Plymouth 072719 18-Oct-2021 (Single day) Freddi Smith	MAKE A REQUEST	31.50	31.50

REJECTED CLAIMS

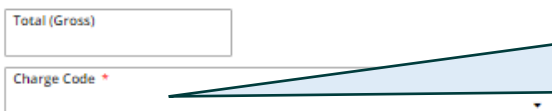
If the approver has any queries about your claim or spots a mistake, your claim will be rejected and you will receive email confirmation of this. If this happens, your claim status will change to 'Make a Request'.

The claim is returned to you in an editable state so you can make the changes needed then 'Submit' it again for approval.

Wrong cost code? 'Edit' every line within the claim that needs to have the cost code changed:



The screenshot shows the 'Expenses' section with a total of 900.00. A single expense line is visible: 'Geography field trip' dated 06-Mar-2023, with a payment method of 'Pay Employee' and a status of 'DRAFT'. The amount is 900.00. The 'Edit' button is highlighted with a red box.



Total (Gross)

Charge Code *

Find the 'Charge Code' field near the bottom of this section.

Delete the previous charge code and enter the correct one - [look up T1 codes here](#)

'Save' all the changes, then resubmit for approval again.

HELP & SUPPORT

BUCS expenses help

aubucs@exeter.ac.uk 01392 723505 ext 3505

T1 expenses help

financehelpdesk@exeter.ac.uk 01392 726981 ext 6981

Other T1 info <https://www.exeter.ac.uk/departments/finance/training/keytopics/studentandpgt1training/>