

HOW TO CLAIM

You will need access to T1, a member of staff can complete a '[New User Request](#)' form on T1 on your behalf

If currently enrolled, use the University's finance system, called [T1](#), to create and manage your claim

If interrupted or no longer enrolled, please email financehelpdesk@exeter.ac.uk

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, update your details on [iExeter](#) following these [instructions](#)
- 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

Know which T1 cost code to use -

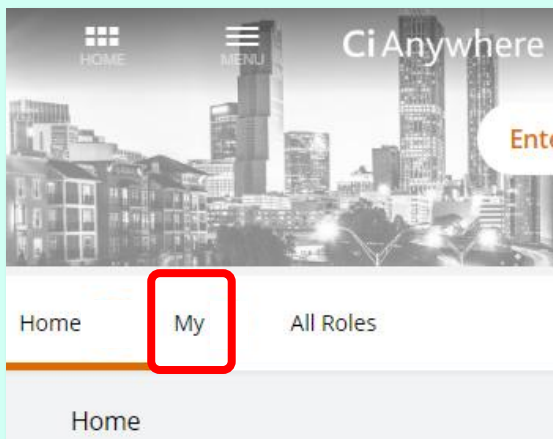
- Look up a cost code by name or owner with the [T1 Code Dashboard](#)
e.g. search *BUCS* to see all the BUCS cost codes (each club has its own code)
- Or ask the event organiser which cost code to use

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

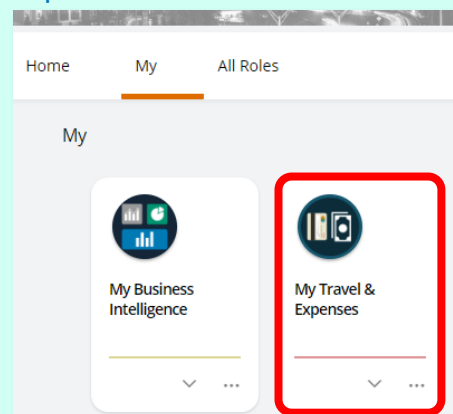
Scan your receipts as the images will need to be attached to the claim (NB mileage claims don't need receipts)

HOW TO USE T1

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



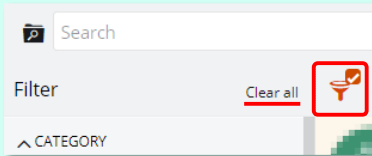
2) On the 'My' page, click the 'My Travel and Expenses' icon:



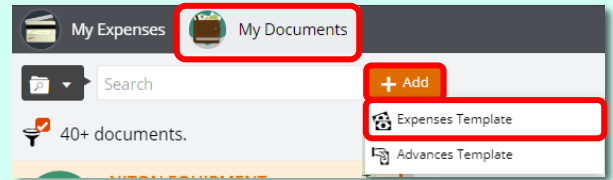
STUDENT EXPENSE CLAIMS

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:

Cancel Save

Expenses Template

Add Expense Document
Expenses Template

Allowances

Expenses

Add Expense Document

^ Details

User *
KT577 (Katie Taylor) *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

Please ensure that all expenses are claimed back in line with the University Expense
<https://www.exeter.ac.uk/departments/finance/aboutus/policies/#>

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

Save this section, once completed

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

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

Save

Defaults to same as first section - change if needed

Expense Date *
10-Feb-2025

Payment Method *

Expense Item *

From *

To *

Select type from drop-down list:
Pay Employee = will be paid into claimant's bank account (Students use this option to pay into bank account)
Pay via Purchase Card = to be matched to a UoE purchase card
Pay Using Employee Advance Document = to reconcile claimant's own cash advance

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

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

Narrative *

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

Receipts relating to EU grants?

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)

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

Charge Code *

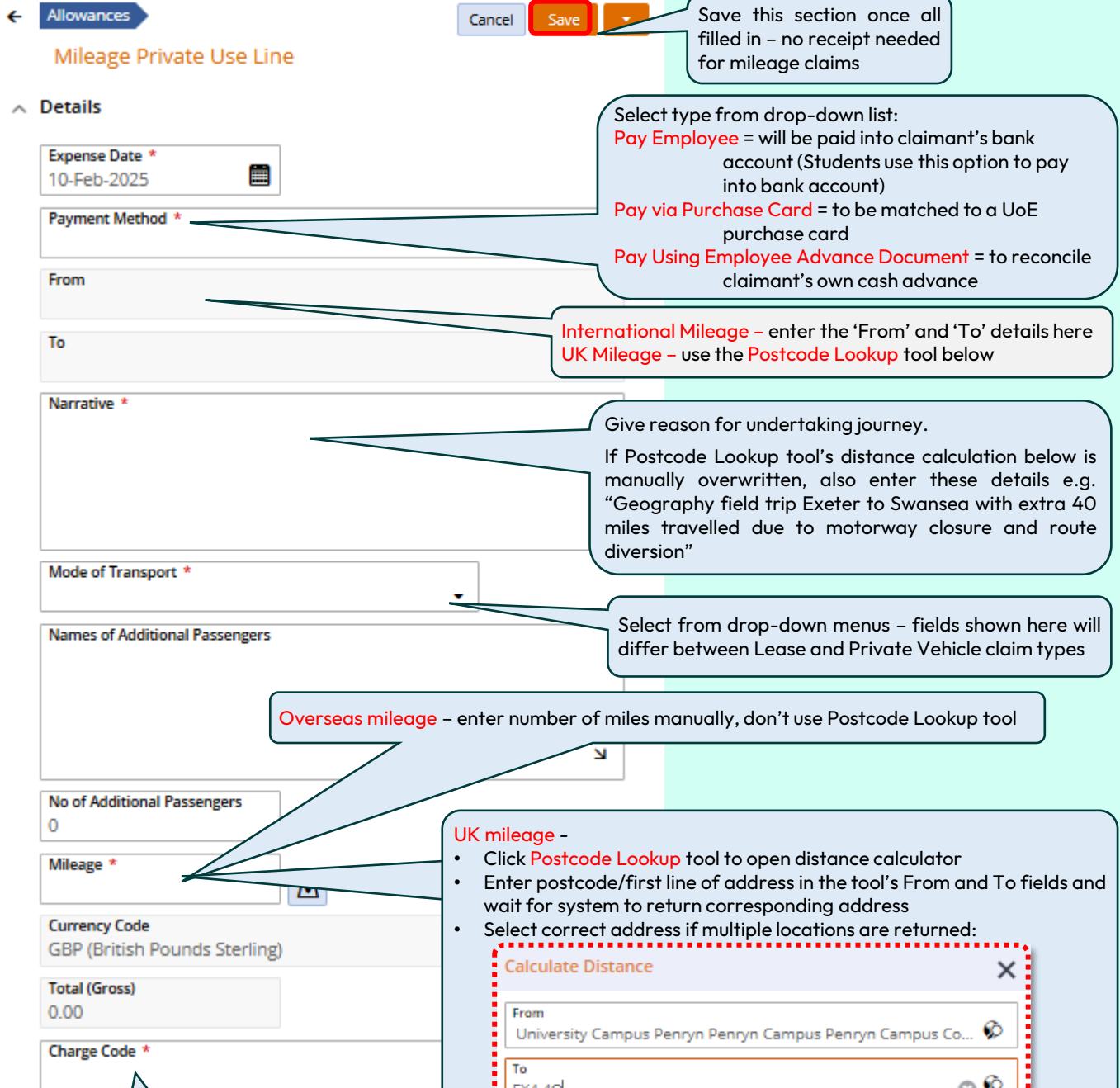
+ Add

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](#)

Add the receipt image + any other docs supporting the claim here

STUDENT EXPENSE CLAIMS

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



Allowances [Cancel] [Save] [Dropdown]

Mileage Private Use Line

Details

Expense Date * 10-Feb-2025 [Calendar Icon]

Payment Method * [Callout: Save this section once all filled in – no receipt needed for mileage claims]

From [Callout: Select type from drop-down list:
Pay Employee = will be paid into claimant's bank account (Students use this option to pay into bank account)
Pay via Purchase Card = to be matched to a UoE purchase card
Pay Using Employee Advance Document = to reconcile claimant's own cash advance]

To [Callout: International Mileage – enter the 'From' and 'To' details here
UK Mileage – use the Postcode Lookup tool below]

Narrative * [Callout: 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"]

Mode of Transport * [Callout: Select from drop-down menus – fields shown here will differ between Lease and Private Vehicle claim types]

Names of Additional Passengers [Callout: Overseas mileage – enter number of miles manually, don't use Postcode Lookup tool]

No of Additional Passengers 0

Mileage * [Callout: 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 4QJ
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]

Currency Code GBP (British Pounds Sterling)

Total (Gross) 0.00

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

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 [Close]

From University Campus Penryn Penryn Campus Penryn Campus Co... [Clear] [Search]

To EX4 4QJ [Clear] [Search]

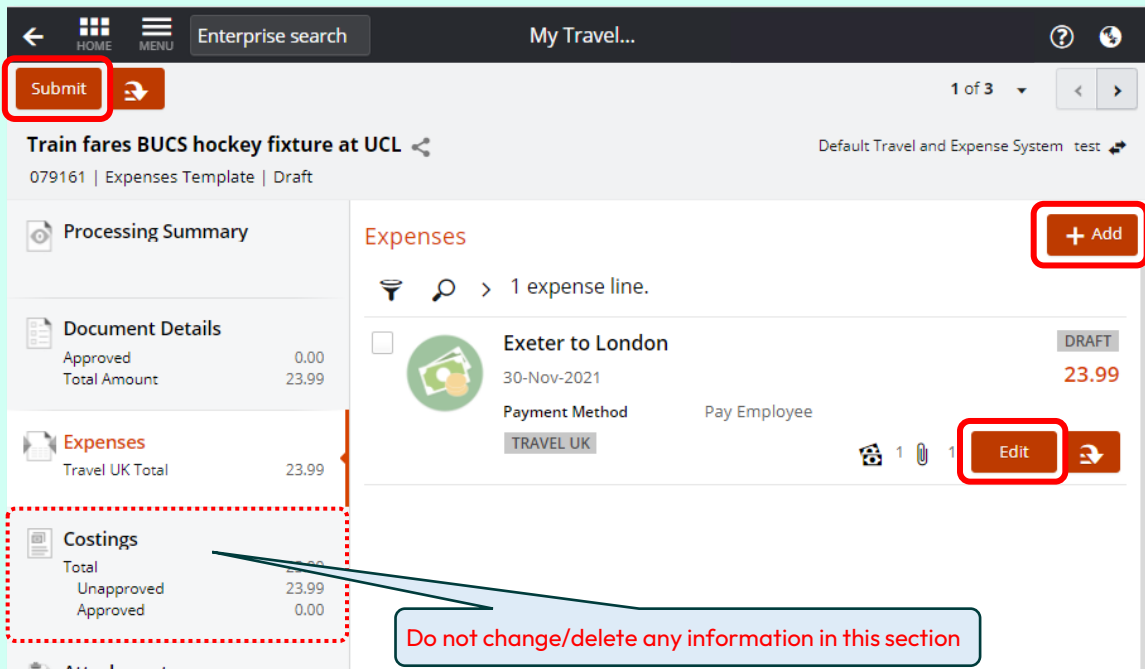
Grassway House, Clydesdale Road, EXETER EX4 4QX

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

STUDENT EXPENSE CLAIMS

- 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



Enterprise search My Travel... 1 of 3

Submit

Train fares BUCS hockey fixture at UCL Default Travel and Expense System test

079161 | Expenses Template | Draft

Expenses **+ Add**

1 expense line.

Exeter to London DRAFT 23.99

30-Nov-2021

Payment Method Pay Employee

TRAVEL UK **Edit**

Costings

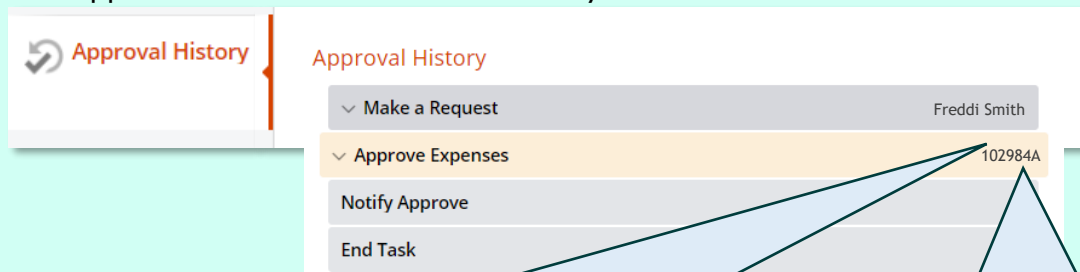
Total

Unapproved 23.99

Approved 0.00

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:



Approval History

Approval History

Make a Request Freddi Smith

Approve Expenses 102984A

Notify Approve

End Task

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 5pm each Tuesday

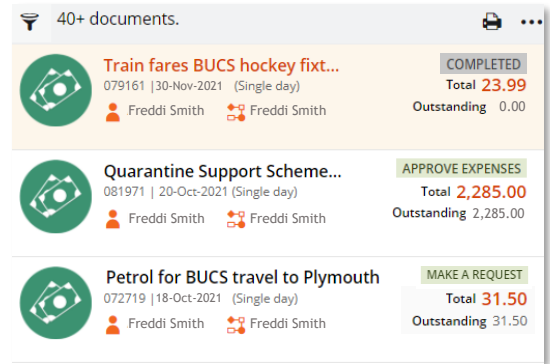
- Claims to UK bank accounts sent by BACS each Wednesday take 2 days to arrive
- Claims to non-UK banks may take 3-7 days to arrive

COMPLETED

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



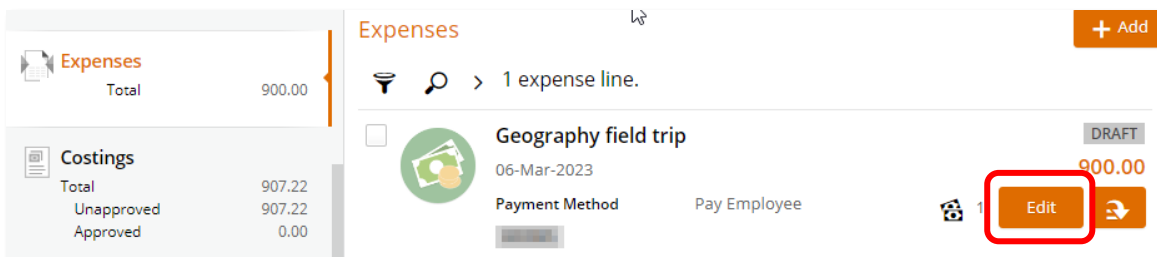
Document	Status	Total	Outstanding
Train fares BUCS hockey fixt... 079161 30-Nov-2021 (Single day) Freddi Smith	COMPLETED	23.99	0.00
Quarantine Support Scheme... 081971 20-Oct-2021 (Single day) Freddi Smith	APPROVE EXPENSES	2,285.00	2,285.00
Petrol for BUCS travel to Plymouth 072719 18-Oct-2021 (Single 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 specific expense line is shown: 'Geography field trip' dated 06-Mar-2023, with a payment method of 'Pay Employee' and a value of 900.00. The status is 'DRAFT'. An '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 option 1

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