

T1 EXPENSES: CLAIMANT REVIEW

When a T1 expense claim is created by someone other than the claimant, it needs to be checked by the claimant for accuracy.

This is called a **Claimant Review** and there are three ways to carry it out:

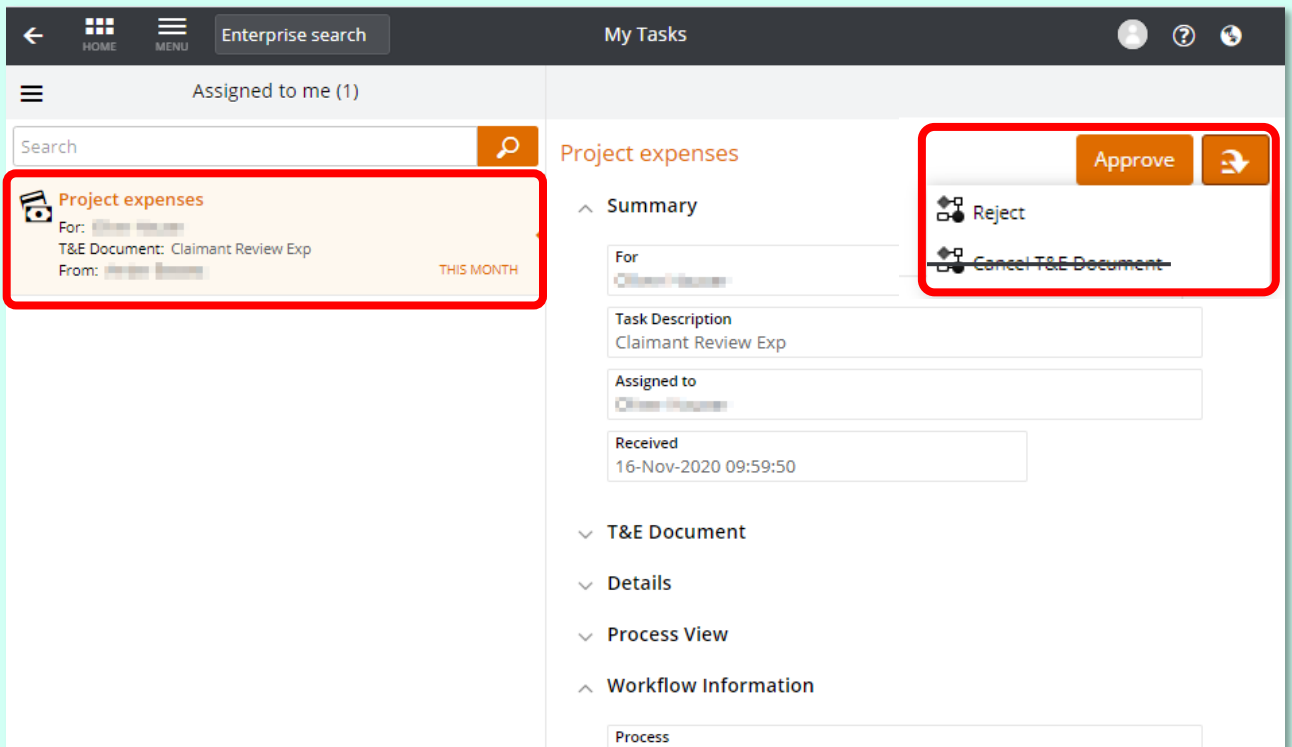
Email

- T1 sends a Claimant Review approval email to the claimant's exeter.ac.uk email address.
- Check the claim details and budget code(s) used are correct.
- Use the approve/reject buttons within the email to reply back to T1.

NB This method cannot be used if the T1 email has been forwarded on to a private email address.

T1 My Tasks

- Login to T1 – - <https://exe.t1cloud.com/>
- Open the 'My Tasks' function on the Home page.
- Locate the task and check the details.

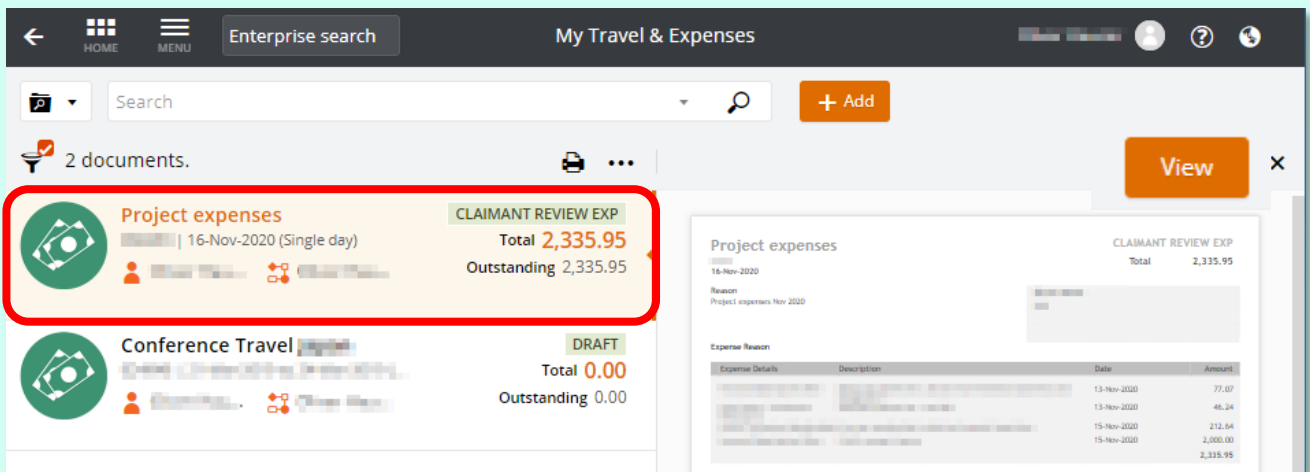


The screenshot shows the 'My Tasks' interface. On the left, a task card for 'Project expenses' is highlighted with a red box. The card shows 'For: [redacted]', 'T&E Document: Claimant Review Exp', and 'From: [redacted]' with a 'THIS MONTH' label. On the right, the task details are shown, including a 'Summary' section with 'For: [redacted]', 'Task Description: Claimant Review Exp', 'Assigned to: [redacted]', and 'Received: 16-Nov-2020 09:59:50'. Below this are sections for 'T&E Document', 'Details', 'Process View', and 'Workflow Information'. A red box highlights the 'Approve', 'Reject', and 'Cancel T&E Document' buttons in the top right corner of the details panel.

- Select 'Approve' if it is correct.
- Select 'Reject' from the orange drop-down menu if incorrect or is no longer required and add comments on why it's being rejected. This returns the claim to the creator who can change or delete the details.
- Do not select 'Cancel T&E Document' as this is for admin use only.

T1 Travel and Expenses Function

- Login to T1 – <https://exe.t1cloud.com/>
- Open the ‘My Travel and Expenses’ function on the My page.
- Locate the expense claim and select ‘View’.



Enterprise search My Travel & Expenses

2 documents.

Project expenses CLAIMANT REVIEW EXP
16-Nov-2020 (Single day) Total **2,335.95**
Outstanding 2,335.95

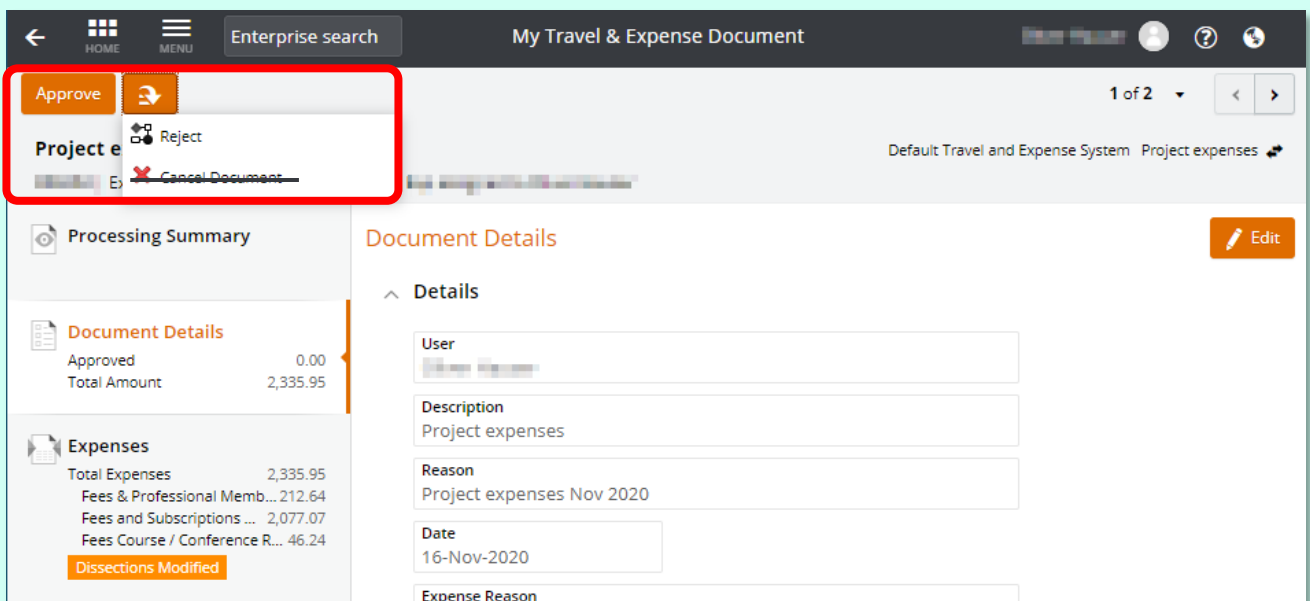
Conference Travel DRAFT
Total **0.00**
Outstanding 0.00

View

Project expenses CLAIMANT REVIEW EXP
Total 2,335.95

Expense Details	Description	Date	Amount
		13-Nov-2020	77.07
		13-Nov-2020	46.24
		15-Nov-2020	212.64
		15-Nov-2020	2,000.00
			2,335.95

- Check the claim details and any receipts have been added as attachments.
- Select ‘Approve’ if it is correct.
- Select ‘Reject’ from the orange drop-down menu if incorrect or is no longer required and give details in the comments box why it’s being rejected. This returns the claim to the creator who can change or delete the details.
- Do not select ‘Cancel Document’ as this is for admin use only.



Enterprise search My Travel & Expense Document

1 of 2

Approve Reject Cancel Document

Processing Summary

Document Details

Approved	0.00
Total Amount	2,335.95

Expenses

Total Expenses	2,335.95
Fees & Professional Memb...	212.64
Fees and Subscriptions ...	2,077.07
Fees Course / Conference R...	46.24

Dissections Modified

Document Details

Details

User

Description
Project expenses

Reason
Project expenses Nov 2020

Date
16-Nov-2020

Expense Reason

Edit