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| **Non-Staff Expenses Claim Form** |
| This form can be used for reimbursing all Non-Staff (including interviewee) expenses for travel, subsistence and other expenses incurred. Claims must be made in accordance with the expenses policy and the conditions specified on page 4. For information about our privacy policy and how we use your information please go to [Finance Privacy Notice](https://www.ed.ac.uk/finance/about/privacy)**Claimant:** Please complete **sections** **1 to 5** and return to sender with the appropriate expenditure receipts. Receipts showing proof of spend should be returned with the claim form. Images or attachments should be named in line with the row number shown below i.e. receipt no 1 should be for row number 1.**NOTE:** You do not need to physically sign this form. Simply type your name into the claimant’s name field in section 4.**School/Department:** Complete costing information and preparer details in **section 6**/**7** and submit form with receipts to Finance.Helpline@ed.ac.uk. |
| **Section 1: Personal Details** - (Please do not use any special characters i.e. accents) |
| Claimant name: |       | Home Address: | Address line 1:      Address line 2:      Address line 3:      Postcode:       |
| Email address (for BACS remittance): |       |
| Supplier number (if known): |       |
| **Section 2: Bank Details**  |
| Bank/Building Society Name: |       | Branch Address: |       |
| Account Number/Roll Number: |       | Sort code: |       |
| **If paying to an overseas account, please provide the following information:** |
| IBAN: |       | BIC/SWIFT: |       |
| IFSC number or account type: |       | Routing/transit number: |       |
| **Section 3: Expense claim details** |
| Overall purposes of claim (i.e. trip/event details): |       |
| Start date of claim (placement/travel date) DD/MM/YYYY: |       | End date of claim period (placement/travel date) DD/MM/YYYY: |       |
| Total expenses to be reimbursed (breakdown should be provided on next page): |       |

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| **Section 4: Breakdown of reimbursement (you can add or delete rows where required)** |
| Claim no | Date of expense (i.e. date on receipt) | Description of expenditure *(you must include start and end point of journey if claiming mileage costs)* | Number of miles (if claiming mileage) | Mileage rate ([refer to conditions on page 4](#_CONDITIONS_2)) | Costs incurred (original currency) | Original currency (GBP, EUR, USD) | Exchange rate (if applicable)[xe.com](https://eur02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.xe.com%2F&data=05%7C02%7C%7Cd9cf67b61e774eef62dd08dc3967fdba%7C2e9f06b016694589878910a06934dc61%7C0%7C0%7C638448366003937588%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=VAgmSJ8WjygRkEYhCV0%2BgYvpEOdzPpLOsywhmjufvGE%3D&reserved=0) | Total amount payable | Payment currency (GBP, EUR, USD) | Receipts Attached |
| Example 1 | 27/03/2025 | *Start point EHxx to G7 xxx. Claim is for round trip.* | 90 | 0.45 | 40.50 | GBP |  | 40.50 | GBP | [ ]  |
| Example 2 | 27/03/2025 | *Conference fees (meals are shown below)* |  |  | 110.00 | GBP | 1.20 | 131.53 | EUR | [ ]  |
| 1 |       |       |       |       |       |       |       |       |       | [ ]  |
| 2 |       |       |       |       |       |       |       |       |       | [ ]  |
| 3 |       |       |       |       |       |       |       |       |       | [ ]  |
| 4 |       |       |       |       |       |       |       |       |       | [ ]  |
| 5 |       |       |       |       |       |       |       |       |       | [ ]  |
| 6 |       |       |       |       |       |       |       |       |       | [ ]  |
| 7 |       |       |       |       |       |       |       |       |       | [ ]  |
| 8 |       |       |       |       |       |       |       |       |       | [ ]  |
| 9 |       |       |       |       |       |       |       |       |       | [ ]  |
| 10 |       |       |       |       |       |       |       |       |       | [ ]  |
| **Total being claimed:** | **0.00** |  |
| **If the claim/invoice is to be paid to a UK bank account**, any foreign currency claims should be converted to sterling (GBP) at the nearest applicable exchange rate to the date of the transaction and claimed in sterling (GBP) “including any charges”. **If the claim/invoice is to be paid to an overseas account**, you should convert the claim to the relevant currency accepted by your bank i.e. to make a payment to an account held in Germany claims should be paid in EUROS. You can use: [xe.com](https://www.xe.com/) to convert the transaction or attach an image of the transaction from your bank statement for evidencing the claim value or;**As an alternative to completing any conversion calculations above**, you can simply enter the sum you are claiming in the original currency you paid in and leave the conversion rate blank. Just confirm what currency you would like the payment to be made in (again it must match the currency accepted by your bank) and our Finance System can convert the payment using a built in currency convertor tool. We will let you know how much is being paid into your account via a BACS remittance advice which will be emailed to you when the payment has been made.**NOTE:** We can only make payments in currencies supported by our Finance System if the payment currency you select isn’t supported, you should default to USD or GBP. Supported currency rates can be found here:[Currency list](https://uoe-finance.ed.ac.uk/sites/default/files/2025-04/Currency%20List%2025.pdf) |
| **Section 5: Declaration** – I certify that I have read and understood the conditions; the cost of any alcohol purchased has been removed from the claim; the expenses above were incurred by me and itemised receipts are attached to evidence expenditure. |
| Claimant name: |       | Date (DD/MM/YYYY): |       |
| **NOTE:** You do not need to physically sign this form. Simply type your name into the claimant’s name field. The remainder of the form will be completed by your School/College. |

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| **This section should be completed by the School/College** |
| **Section 6: Costing Information - please refer to the** [**Guidance for the New Chart of Accounts and General Ledger mapping tool.**](https://uoe.sharepoint.com/sites/FinanceHub/SitePages/Chart-of-Accounts.aspx?OR=Teams-HL&CT=1661875329362&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjA3MzEwMTAwNSIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D) |
|  | **Currency** **(e.g GBP, USD, EUR)** | **Payment Amount**  | **Entity** **(3 digits)**  | **Fund** **(6 digits)**  | **Cost Centre** **(8 digits)**  | **Account** **(4 digits)**  | **Analysis** **(6 digits)**  | **Portfolio** **(8 digits)**  | **Product** **(8 digits)**  | **Intercompany** **(3 digits)**  |
|  | **MANDATORY** |   **MANDATORY** | **MANDATORY**Use the mapping tool | **MANDATORY** Type of funding the cost is attached to | **MANDATORY** Organizational Unit (department) | **MANDATORY** Use the mapping tool | Likely to always be zero - check the mapping tool | Likely to always be zero - check the mapping tool  | Likely to always be zero - check the mapping tool | For cross charging to or from a subsidiary - check the mapping tool  |
| *Example* | *GBP* | *150.00* | *110* | *123456* | *12345678* | *1234* | *000000* | *00000000* | *00000000* | *000* |
| Costing Split 1 |     |       | 110 |       |       |      |       | 00000000 | 00000000 | 000 |
| Costing Split 2 |     |       | 110 |       |       |      |       | 00000000 | 00000000 | 000 |
| Costing Split 3 |     |       | 110 |       |       |      |       | 00000000 | 00000000 | 000 |
| Costing Split 4 |     |       | 110 |       |       |      |       | 00000000 | 00000000 | 000 |
| Costing Split 5 |     |       | 110 |       |       |      |       | 00000000 | 00000000 | 000 |
|  **Section 7: Costing Information (for payments associated with projects) - please refer to the** [**Guidance for POETA and mapping information**](https://uoe.sharepoint.com/sites/FinanceHub/SitePages/Chart-of-Accounts.aspx?OR=Teams-HL&CT=1661875329362&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjA3MzEwMTAwNSIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D) |
|  | **Currency** **(e.g GBP, USD, EUR)****MANDATORY** | **Payment Amount MANDATORY**  | **Project number****MANDATORY** Use the mapping tool | **Task Number** **MANDATORY**Use mapping tool or task 1 if unknown | **Expenditure Type****MANDATORY**Use the mapping tool | **Expenditure Organisation**Always University of Edinburgh |
| *Example* | *GBP* | *150.00* | *1172081\_117083* | *1* | Drop down from mapping tool | *University of Edinburgh* |
| Costing Split 1 |     |       |       |       |       |  *University of Edinburgh*  |
| Costing Split 2 |     |       |       |       |       |  *University of Edinburgh*  |
| Costing Split 3 |     |       |       |       |       |  *University of Edinburgh*  |
| Costing Split 4 |     |       |       |       |       |  *University of Edinburgh*  |
| Costing Split 5 |     |       |       |       |       |  *University of Edinburgh*  |
|  **Prepared by (used for approval route):** |  | **Date (DD/MM/YYYY):** |       |
| **Department name:** |  | **Email address of preparer:** |  |

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|  CONDITIONS |
| **Policy information** | The University’s Expenses policy applies to staff, students & others employed by the University, non-staff members claiming using this form must also comply with the extracts of the [University’s Expenses policy](https://uoe-finance.ed.ac.uk/for-staff/financial-regulations-policies-and-procedures/finance-policies-and-procedures)* The policy applies to all expenditure. This policy takes precedence unless more restrictive financial limits are stipulated by the funder (for example, a research grant).
* Responsibility for compliance with this policy rests with the claimant for the reimbursement of expenses and their approving head of department, budget holder or a designated Finance Manager (“the authoriser”).
* The University will reimburse claimants for expenses which they wholly, necessarily and exclusively incur in the course of official University purposes.
* Only actual evidenced costs which are incurred as part of the University’s purposes will be reimbursed.
* Claimants and authorisers must aim to ensure that economy, efficiency and effectiveness are achieved in respect of all expenses incurred without compromising personal safety.
* Sustainability of activity is assessed - before committing to any business travel expense, individuals must review the [Sustainable Travel Policy](https://sustainability.ed.ac.uk/operations/travel/sustainable-travel-policy) and check

the activity is in line with the policy. |
|  **Travel expenses** | * The University will reimburse the costs of necessary travel for university purposes between one University workplace and another temporary place of work for meetings or other purposes (on university or other premises). The University will not reimburse the costs of ordinary commuting or private travel.
* Guests and visitors to the University who are making their own travel arrangements do not have to book travel with Diversity Travel, but should be encouraged to follow the [Sustainable Travel Policy](https://sustainability.ed.ac.uk/operations/travel/sustainable-travel-policy) where possible (e.g. by taking the train from London rather than flying to reduce carbon emissions).
* The use of private vehicles is strongly discouraged and should only be used when no reasonable alternative exists.
* Where business mileage is being claimed, the start point, destination and number of miles must be included on the expense claim. For travel within the UK, approved mileage rates for cars, motor cycles and bicycles can be found at the [HMRC website](https://www.gov.uk/government/publications/rates-and-allowances-travel-mileage-and-fuel-allowances/travel-mileage-and-fuel-rates-and-allowances). If you are claiming from outside the UK you should use a locally appropriate mileage rate, and provide evidence of where that rate has come from or how it was derived. Mileage can only be claimed when using a personal vehicle, not a rental vehicle. Fuel costs can be claimed for rental vehicles.
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|  **Subsistence/other expenses** | * The actual costs of personal incidental expenses such as newspapers, private calls, laundry, non-alcoholic drinks, etc. can be claimed provided that the total amount spent on such items amounts to no more than £5 per night (where the night is spent in the UK) or £10 per night (where the night is spent outside the UK). Receipts are required. This is not a round sum per day allowance claimed for nights away from home. The cost of alcohol consumed as part a meal will not be reimbursed.
* Food and beverages taken as a meal (breakfast, lunch and dinner) can be claimed while travelling on university business if the meal-time falls within the journey. Costs should not be excessive. As a guide, reasonable rates in the UK are considered to be: Breakfast: £10, Lunch: £10, Dinner: £25. **The cost of alcohol consumed as part a meal will not be reimbursed**
 |
|  **Claiming expenses** | * All non-staff expenses must be recorded, clearly itemised and accurately coded on this Expenses Claim Form.
* All claims for expenses should be made promptly. Claimants should submit expense claims within three months of the expense being incurred.
* All receipts showing proof of payment must be attached (in a PDF file where possible) and returned with the claim form for approval. All receipts must be legible. Mileage claims do not require a receipt.
* Expenses claims are paid direct to the claimant’s bank account by BACS within 5 days of expenses being approved.
 |
| **Interview Expenses** | * Reimbursement will be made if you live out with Edinburgh. You can claim the cost of:
* Travel (within the UK) to the interview, normally by public transport.
* Cost of accommodation if the return journey cannot be made within one day.
* Reasonable expenses for meals and refreshments.
* If you used your own car to travel to the interview the approved mileage rate for expense claims will be used which can be found on the HMRC website. This arrangement will apply only where the total return journey is not more than 100 miles. This distance limit may be waived if public transport is not a practical mode of travel, or if coming by car the cost of an overnight stay will be saved.
* If you are travelling from overseas, please agree costs in advance with the relevant School or department for which you are being interviewed.
* Actual subsistence costs incurred can be claimed and itemised bills and proof of payment must be provided. These should be of a reasonable amount. The authoriser of your expenses will judge whether the claim is reasonable and if not you may not be fully reimbursed.
 |
| **Electronic Travel Authorisation (ETA)** | * Visitors who do not require a visa to visit the UK (e.g. European nationals etc), will be required to pay a fee of £16 to cover the cost of an Electronic Travel Authorisation (ETA). The ETA is valid for up to 2 years or for the validity of the passport if less than 2 years. Impacted individuals who are coming to the UK to attend a job interview or for those visiting the University (where travel expenses have been agreed in advance), will need to obtain the ETA before travelling.   The cost of the ETA can be claimed/reimbursed via expenses.
* If the interviewee or visitor is bringing family members, each individual will need to apply and pay the £16. The cost for family members in attendance is not covered under expenses and will not be reimbursed.
 |