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| **SINGLE PAYMENT TO AN INDIVIDUAL IN A TAX YEAR** |
| **Guidance** |
| This form should be used when paying an individual a sum of £500.00 or less in any one tax year. Individuals submitting more than one invoice must be subject to an employment status check. The £500.00 limit is not a cumulative figure, only one payment up to no more than this value can be made using the single payment to individual form.**Claimant:** Please complete section 1 to 3 of the form and return to the approving department with back up papers i.e. invoice/contract/agreement for provision of services. For information about our privacy policy and how we use your information please go to <https://www.edweb.ed.ac.uk/finance/about/privacy>**Approving Department:** Please complete sections 4-6 and submit the form with any supporting documents to Finance.Helpline@ed.ac.uk.  |
| Section 1 – Payment details - (Please do not use any special characters i.e. accents) |
| Full name (include title): |       |
| Address: | Address line 1:      Address line 2:      Address line 3:      Post code:       |
| Engaging School/Department: |       |
| Supplier number (if known): |       |
| Email address (for BACs remittance): |       |
| Section 2 – Bank details: |
| Name on Account (if different from name above): |       |
| Bank/Building Society name: |       |
| Branch Address: |       |
| Account Number/Roll Number: |       | Sort Code |       |
| IBAN: |       | BIC/SWIFT: |       |
| IFSC number or account type: |       | Routing or transit number: |       |
| Amount to be paid: |       | Currency (i.e. GBP, USD) |       |
| Reason for payment/engagement: |       |
| Section 3 - Declaration by claimant |
| [ ]  I certify that payment in respect of the attached document be paid without the deduction of tax or national insurance as it will be the only payment made to me by the University in the current tax year. I am aware that in the highly unlikely event I request a further payment during this period, I will be liable to tax and national insurance on this payment which may be deducted from any future payments. [ ]  I can confirm that I have the right to live and work in the country in which the services are being provided. |
| Claimant Signature: |       | Date (DD/MM/YYYY): |       |

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| Section 4: 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)**  | **Inter Co** **(3 digits)**  |
|  | **MANDATORY** |   **MANDATORY** | **MANDATORY**Use the mapping tool   | **MANDATORY** Type of funding the cost is attached to**​**  | **MANDATORY** Organisational 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* | *110* | *123456* | *12345678* | *1234* | *000000* | *00000000* | *00000000* | *000* |
| **Costing Split 1** |       |       |     |       |       |      |       |       |       |     |
| **Costing Split 2** |       |       |     |       |       |      |       |       |       |     |
| **Costing Split 3** |       |       |     |       |       |      |       |       |       |     |
|  Section 5: 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*  |
| Section 6 - Declaration by preparer: I have assessed this payment as a one-off single payment in a tax year. I am aware that an employment assessment will be required if further payments are due to this payee. |
| Prepared by (used for approval route): |        | Date (DD/MM/YYYY): |        |
| **NOTE:** If the payment is to be paid to an overseas account, the claim should be converted to the relevant currency for that account i.e. to make a payment to an account held in Germany claims should be paid in EUROS. You can use: [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) to convert the transaction, a copy of the conversion calculation must be attached to the form. **NOTE:** We can only make payment 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: [Guidance on Form Completion (Including Currency List)](https://uoe-finance.ed.ac.uk/sites/default/files/2025-09/_1.docx) |