

How to claim non-staff expenses

for students, external seminar speakers and other non-staff

The approval of the budget holder must be obtained before expenses are incurred e.g. from the Research Committee or from the Principal Investigator of a grant. You should not use the expenses system for purchasing equipment or other items for the University; normal purchasing procedures should be used.

Please note that claims must be submitted within three months of the expenditure being incurred. All expenses are paid into the claimant's personal bank account.

Claiming non-staff expenses is still a paper-based procedure. You should complete the Finance Form **NON STAFF EXPENSES FORM** found at <https://intranet.birmingham.ac.uk/finance/A-Z-Forms.aspx> (under N). There are two forms, one for UK banks and one for overseas banks. The form should be **TYPED**, not handwritten.

You should complete:

1. The top line – surname, date, No of claims for this date.

2. Personal details – name and address.

The “Description of claim” should be the purpose for which expenditure was incurred e.g. Attendance at COLT 2019 Conference, Madrid, 21-27 June 2019 or Presenting a Theory Seminar at School of Computer Science 5/8/19 etc.

3. Bank Details

4. If you are claiming from a School budget you should complete the top half of the ”Expense Description” section and if from a research project budget you should complete the bottom half.

Just use one line for each type of activity e.g. “return travel Birmingham to Madrid” will include flights, trains, taxis etc, “Subsistence” will include all meals. There is no need to detail every item in this section, e.g for conference attendance you could just have separate lines for travel, accommodation, subsistence and conference fees. However, if there are numerous items and receipts you can give details on a separate sheet which you should attach to the form, e.g. Train - University to Birmingham International £4.50, Flight Birmingham to Madrid £87.24, Bus in Madrid £7.00 etc. adding exchange rates used.

All claims should be in GB pounds. For purchases made in a foreign currency you should use a currency converter e.g. <https://www.xe.com/> to convert the expense to GB £s preferably on the day the expense occurred, ensuring that you note the exchange rates used.

The account codes will be completed by the person who authorises the expenses, but project numbers should be added.

5. Car Mileage - If you have travelled by car the current mileage allowance rate is 45p per mile.

6. Print the form and sign it – “Claimant Signature”

7. Attach all receipts to the claim form.

8. Authorised Signatory Name – Pass the form to an authorised signatory for approval.
For claims from the School's Research Budget pass the form to Ceinwen Cushway (Room 242).
For claims from a project research budget pass the form to your supervisor/line manager usually the project's Principal Investigator.