



Finance Transformer
Digital Staff Expenses
Approving Expense Claims Guide

From 27 March 2020, staff across UCL will be able to follow a fully paperless process for the submission of expense claims in iExpenses. This enhancement will enable claims to be submitted and processed using receipt images only and will remove the need to submit paper receipts to Accounts Payable.

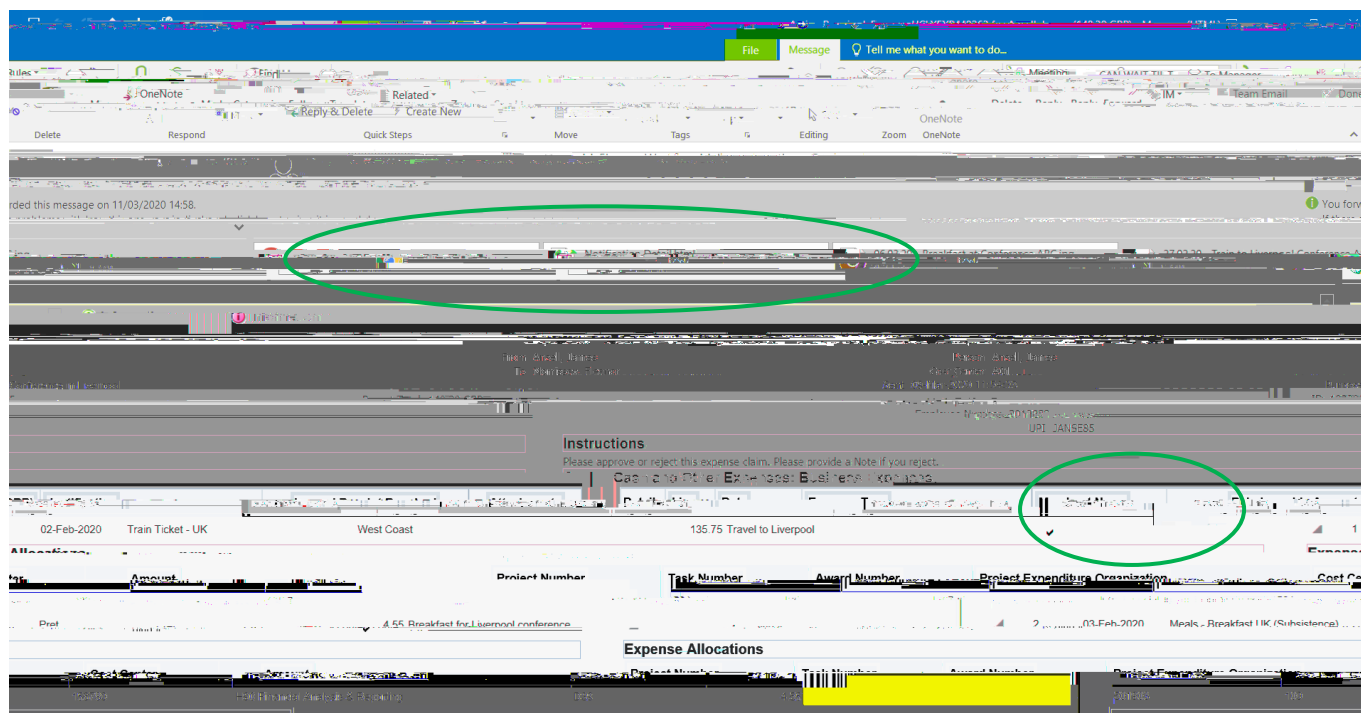
This guidance shows authorised signatories how to view digital receipt images and approve claims using the new functionality. Signatories can approve claims using an email notification or within the MyFinance system. Each option is covered in the guidance below.

Prior to approval, authorised signatories should personally review the receipt images and claim details. Approvers are expected to review claims promptly and consider the following before approving:

- The appropriateness and cost of the expenditure
- The expenses category chosen for each item
- The project code(s) charged
- Any policy violations (please see [UCL Expenses Policy](#))
- That receipts or receipt images correspond to the claim and constitute itemised receipts, not credit card slips/bank statements
- That items within the claim meet the terms of the research funder's terms and conditions (if related to sponsored research)

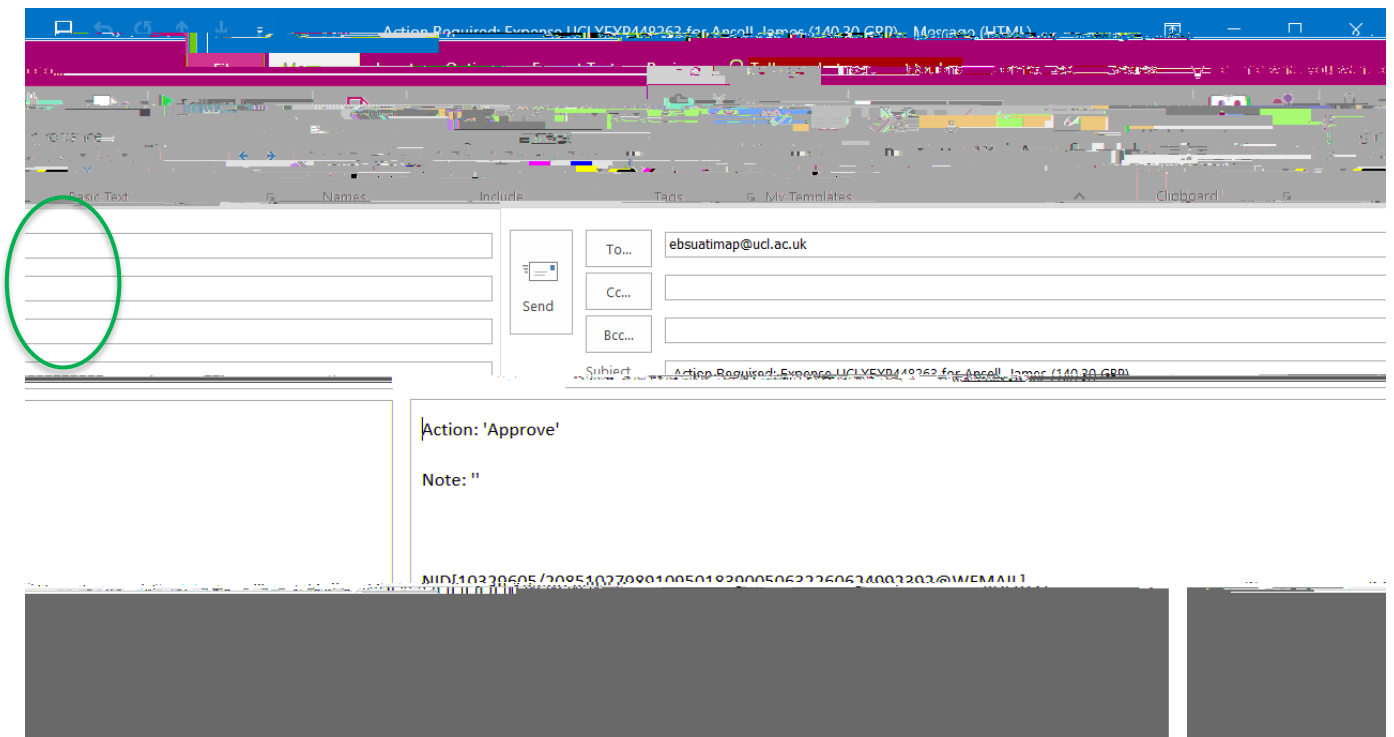
When a claim is submitted, it is routed to the appropriate approver based on the project code charged and the amount of the claim. An email notification is sent to the relevant approver asking them to review the claim and associated receipt images.

1. Open email and review claim details. The receipt images will be attached to the email if applicable. It is marked whether a receipt image should be attached (for some categories receipts are not required, i.e. mileage claims).

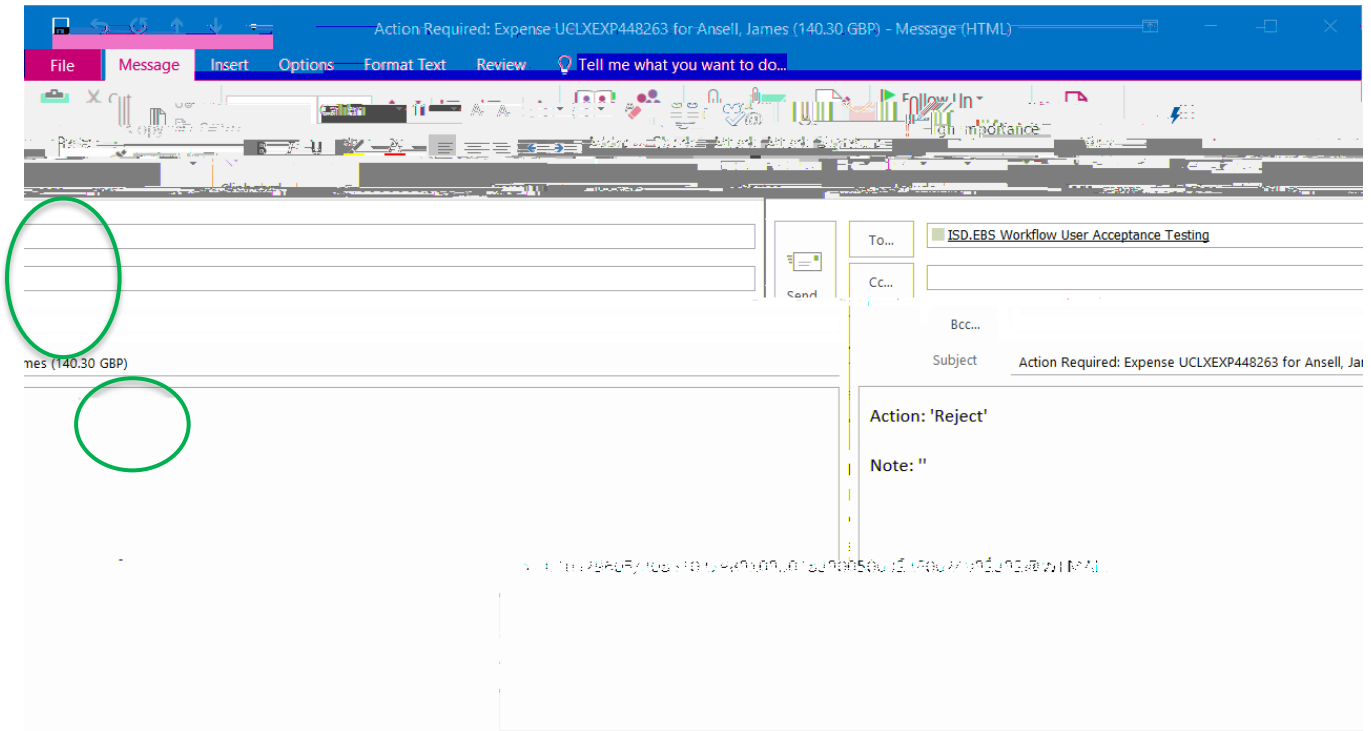


2. When the claim details and receipts have been reviewed, scroll down to bottom of email notification and choose action:
 - a. – claim will be approved and paid following any necessary checks in Accounts Payable
 - b. – claim will be rejected and a notification will be sent to the claimant informing them of this decision
 - c. – a request for further information will be sent via email to the claimant

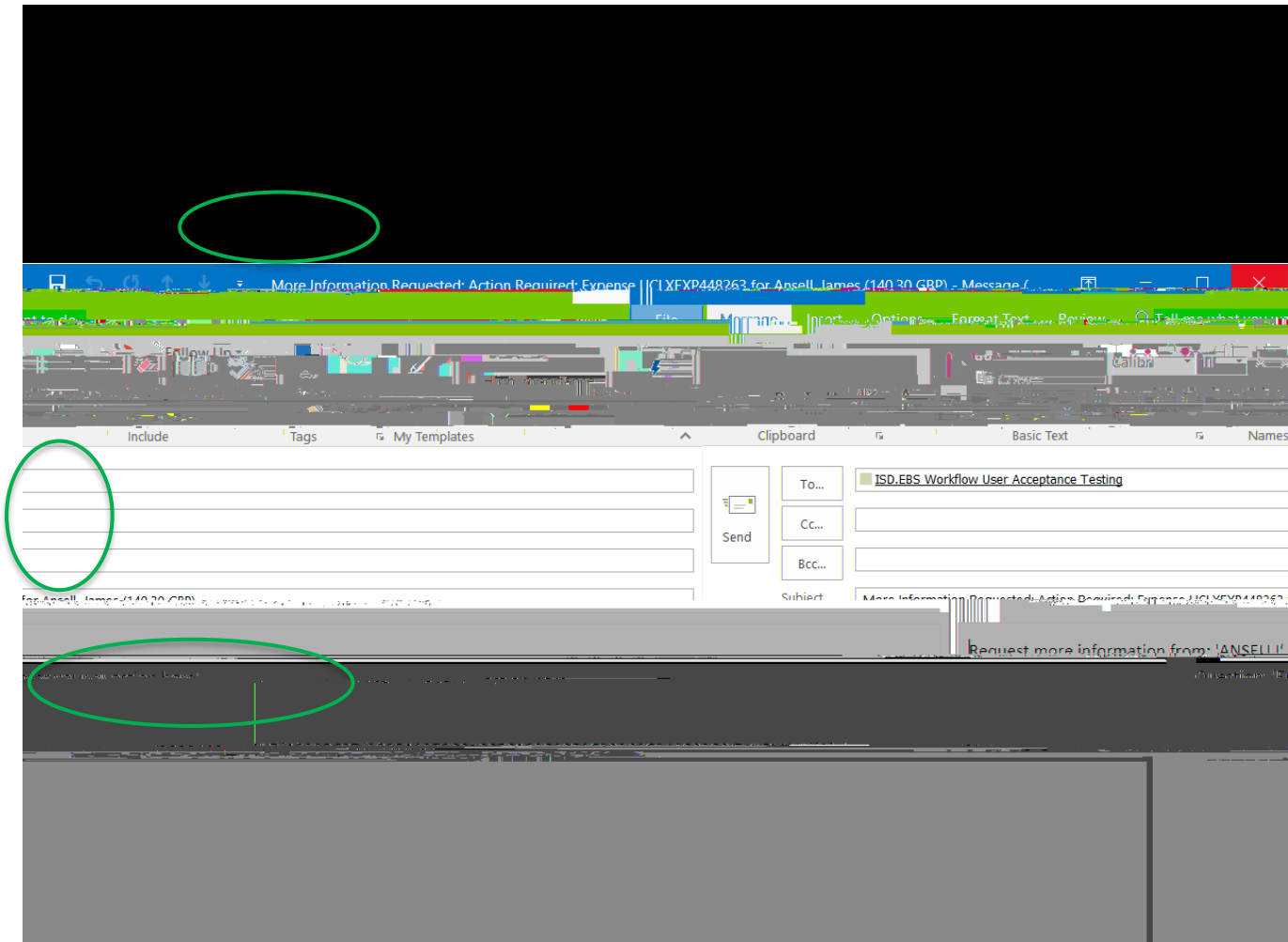
3. To authorise the claim, click the option. A new email is opened, click .



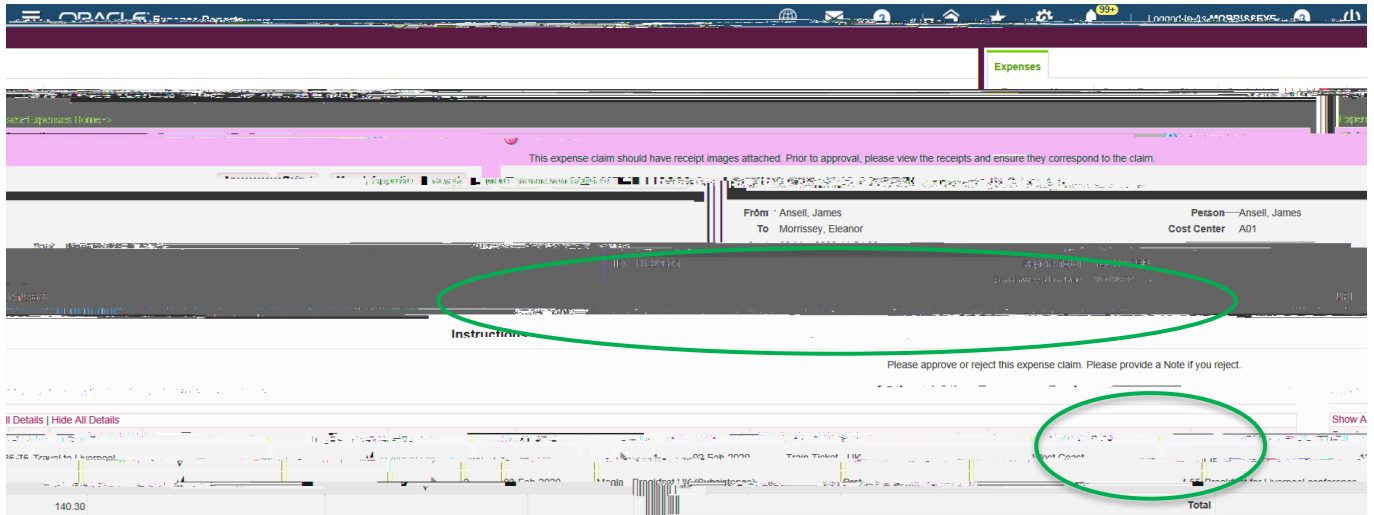
4. To reject the claim, click the Reject option. A new email is opened, click



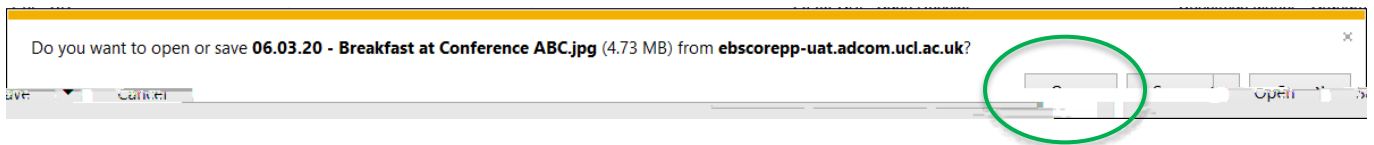
5. To request further details, click . A new email is opened, enter notes, click :



6. The details of the claim can be viewed. It is marked whether a receipt image should be attached (for some categories receipts are not required, i.e. mileage claims). Click on link to receipt image:



7. A message will appear, click and the receipt image will be available to view:



8. When the claim and receipt images have been reviewed, choose action:
- a. – claim will be approved and paid following any necessary checks in Accounts Payable
 - b. – claim will be rejected and a notification will be sent to the claimant informing them of this decision

Please note the More Information Request button is not currently working and is an issue that is being investigated by the Oracle EBS team. In the meantime, if you require more information, please reject the claim and ask the claimant to include more information and resubmit.

