Queen Mary
University of London

Expenses Claim Process

What is an expenses form?

An expenses form is a structured document designed so that you can claim expenses on any eligible costs as part of your Access to Queen Mary programme.

- To be reimbursed for your travel costs, it's necessary to complete the form using Adobe and provide a PDF with receipts
- Remember to attach your receipts to your claim. Your claim will be automatically rejected with them
- Please ensure you keep all tickets and/or ensure you have contacted your payment card to an Oyster account
- We cannot accept receipts which do not contain station or bus journey details e.g. a bank statement will not be sufficient

What do I submit?

Please compile two PDF documents:

1. One containing all receipts
2. One of the expense form

1

Step 1: select your images
Begin by gather the images you want to combine into a PDF. Ensure they are in the same order as in the claim

2

Step 2: create the PDF of your images
Open your preferred image editing software, such as Photoshop or free alternatives like GIMP, or use Word

Ensure the document is standard A4 paper size e.g. 210mm x 297mm

3

Step 3: insert your images
For image editing software, import each image into the document as new layers and arrange them in the desired order

If you're using Word, insert each image into the document and arrange them in order

4

Step 4: save as PDF
Once all the images are in the desired order, save the file as PDF. If you are using editing software, this might be by "exporting"

If you're using Word, select "Save As" and choosing PDF in the file type drop-down menu

Using Microsoft Word can be a convenient option for combining images into a PDF, especially when you want to add text of additional content to your document.

How do I edit the expenses form?

1. Open the expenses form template in Adobe
2. Double-click on the fields that have been highlighted in green to fill in your details. Please note some details have been pre-populated and should not be edited

Surname:		Address:	
Forename:			
Department:	UK Student Recruitment and WP		
Staff payroll number:	N/A		
Staff/Student/Visitor:	Visitor	Email Address:	

3. Add your bank name and address. If you do not know your bank address, you can find this by typing the name of the bank into Google. You also need your sort code and account number. The sort code looks like 00-00-00 and the account number is 8 digits long, 12345678. **The long 16 digit number is not needed.** Ignore the last 3 rows in this section

Bank Name:	
Bank Address:	
Sort Code:	
Account Number:	
IBAN :	N/A
Routing No. (US) Swift Code	N/A
Swift Code (EU)	N/A

4. Add your full name, signature and date you're filling in the form

Claimant's signature:		Date:	
Claimant's name:			
Approved by		Date:	

5. Fill out the table under the <mark>Travel</mark> section, breaking down your journey/s. Ignore the "Mileage" and "Subsistence" sections entirely. An example is below:

   a. **Date**   The date you acquired the expense
   b. **Details of claim**   Include specific stations and/or bus routes
   c. **Mode of travel**   Tube/rail, bus etc.
   d. **Claim**   Cost of the specific claim

Travel

Date	Details of Claim	Mode of travel	Claim (£)
02/04/2024	Seven Sisters - Oxford Street	Tube	£ 2.80
02/04/2024	Oxford Street - Seven Sisters	Tube	£ 2.80
03/04/2024	Anytime return train ticket with travelcard Bedford - Blackfriars	Tube/train	£ 22.40
04/04/2024	Bus journey (route 78) from Shoreditch High Street - Bonar Road	Bus	£ 1.75
		Total Travel Claim (£):	£ 29.75

6. The total claim is auto-calculated so you do not need to enter it anywhere

7. Save the PDF file clearly in the following format: "First Name Last Name [purpose] expenses receipts"

8. Email the completed expenses form and receipts to accesstoqm@qmul.ac.uk