Expense System Guidance

Raising a claim

1. Navigate to the expenses site – https://expenses.rcp.ac.uk/production

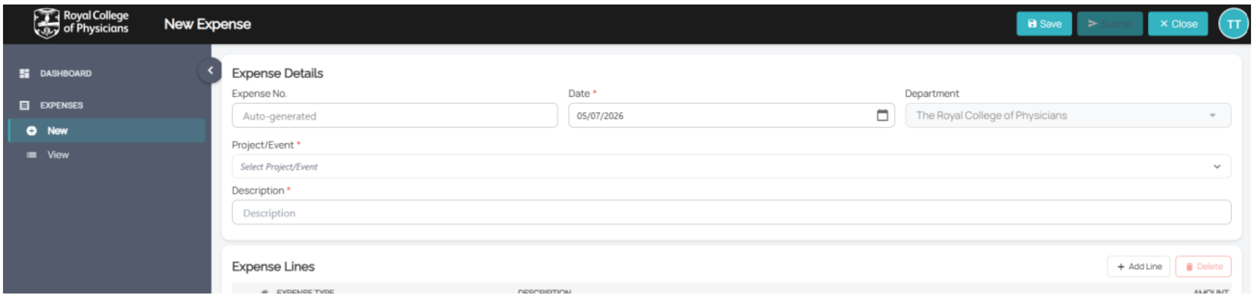
   If you require help signing in, please refer to our guidance 'Logging into your expense account'

   You will be welcomed by your expenses Dashboard.

Later, we will see how you can use your dashboard to track your claims.

2. Use the menu bar to the left of your screen to navigate to Expenses > New.

   A new claim form will open.



Navigate to the bottom of this screen to find links to our policies and general guidance when submitting new claims.

Please keep copies of your receipts or evidence until your claim is approved.

When entering a new expense claim, please refer to the policy relevant to the activities or business your claim relates to:

[Royal College of Physicians expense policy]()

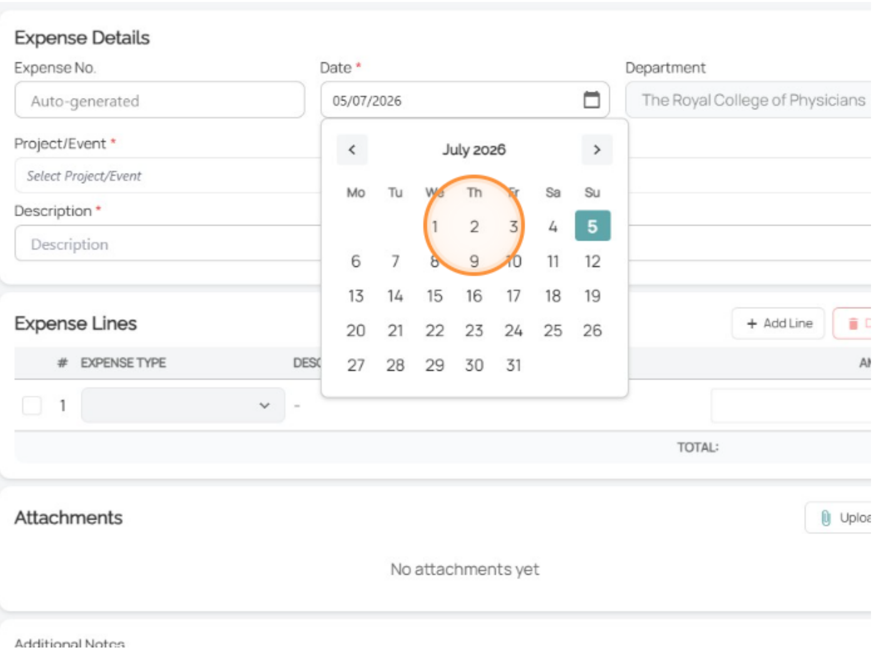
[Federation Travel Expenses Policy]()

For both Royal College of Physicians and Federation business, all claims must:

- be submitted within **three months** of the expenditure being incurred.
- have supporting evidence, ideally a **dated and itemised receipt** that is scanned or photographed and attached using one of the systen supported formats (BMP, PNG, GIF, JPEG, TIFF or PDF).
- ensure receipt files are saved using clear, meaningful file names that accurately reflect the item or service purchased.

Section 1: Expense Details

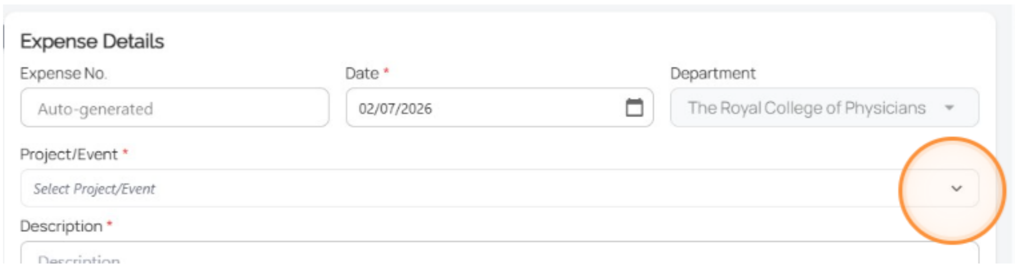
3. The first field to complete is the 'Date'. This field will default to today's date but, you should change it to the date that your claim took place. If you are raising a claim that crosses over multiple dates, you should use the date of your first expense.



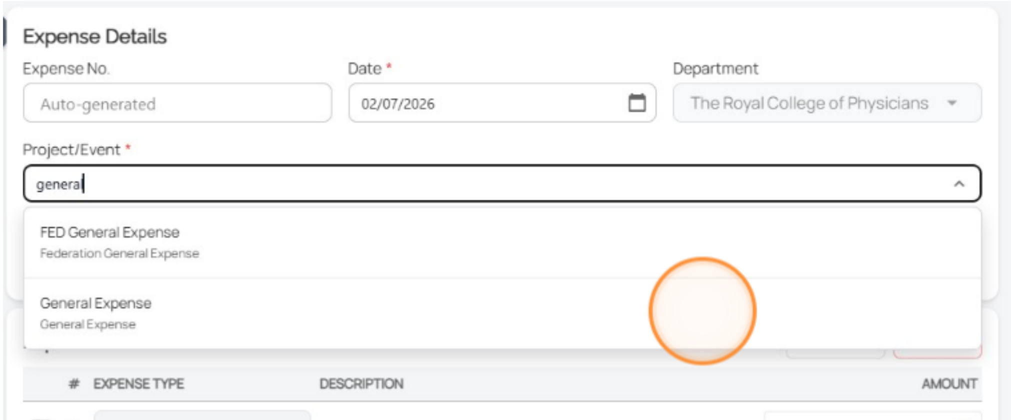
4. Next, you will be required to enter a project or event that your claim relates to. You may have been given this information by your contact at the RCP or Federation. If you are unsure, please refer back to your contact to check before submitting your claim.

   The field can be populated by using the drop down function or you can begin typing in the field and the system will filter the list for you.

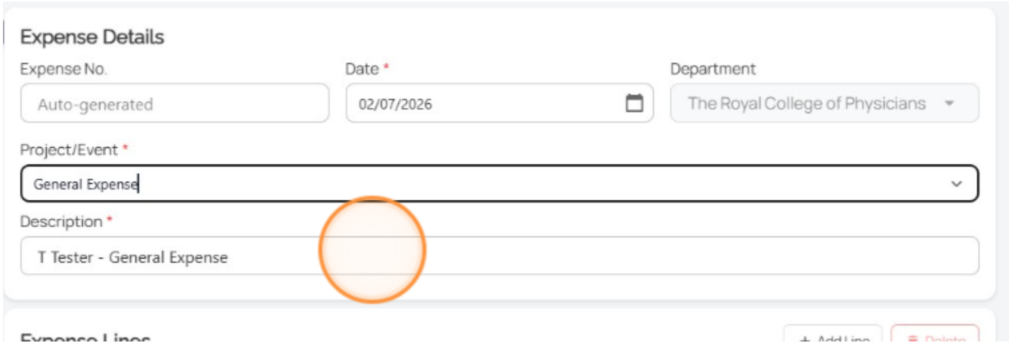
   Drop down list:



Typing:

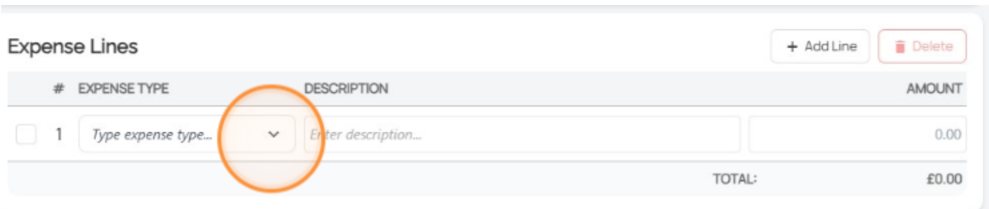


5. The ‘Description’ field is a generic description covering the entirety of your claim. The field will default for you. However, you can change this to something more meaningful to you as this is the description you will see when searching for your claim in the system.

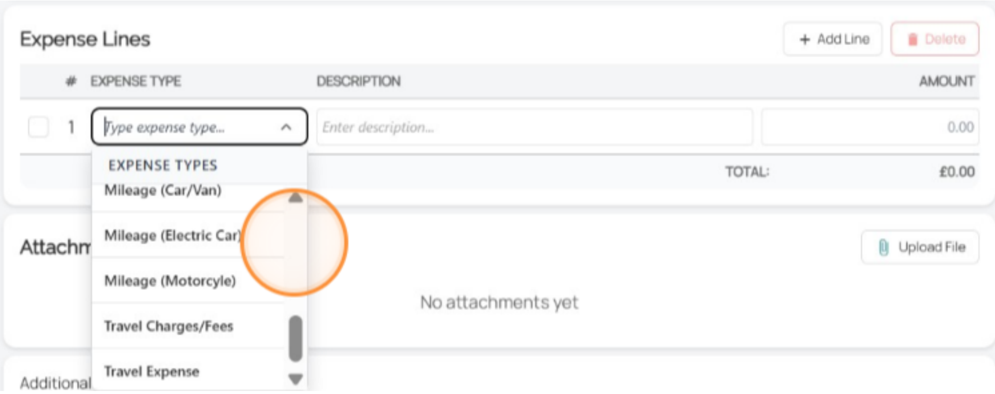


Section 2: Expense Lines

In this section, you will be required to enter the specific details of your claim. Where possible, it is important to separate your claim by item, this makes it easier for the approver to see the individual items that you are claiming for and relate them back to your receipt.

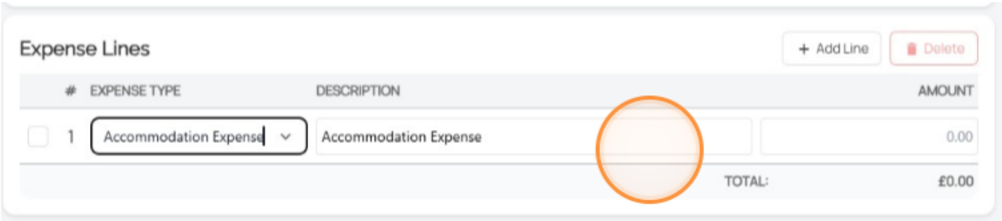


6. In the expense type field, use the drop-down button or begin typing to select an item. You will have a list of items to choose from. If you can’t find an item to reflect your claim, please get in touch with us (expenses@rcp.ac.uk).

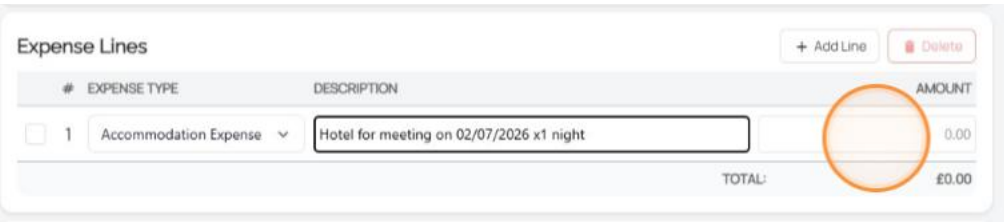


7. Once you have selected your item, the description field will default for you. It is important that you update these details so they reflect the exact item you are claiming. An example is below:

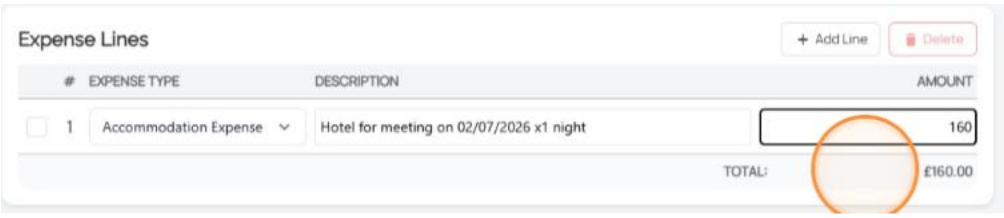
   Default description:



   Description relevant to the claim:



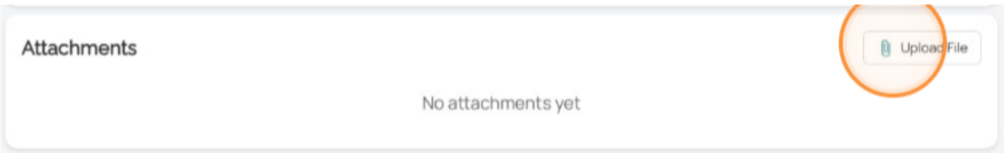
8. Finally, add the total amount (including VAT) of the item you wish to claim. Please refer to the relevant policy document to see if there are any restrictions on the amount you can claim for specific items.



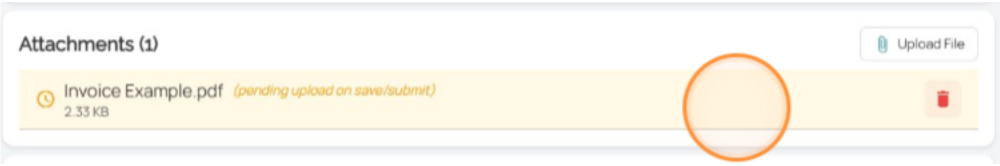
Section 3: Attachments

For your claim to be approved, it is vitally important to include any attachments that are relevant to your claim. We ask that you attach evidence such as a **dated and itemised receipt** that is scanned or photographed and attached using one of the systems supported formats (BMP, PNG, GIF, JPEG, TIFF or PDF).

9. To add an attachment, click 'Upload File'



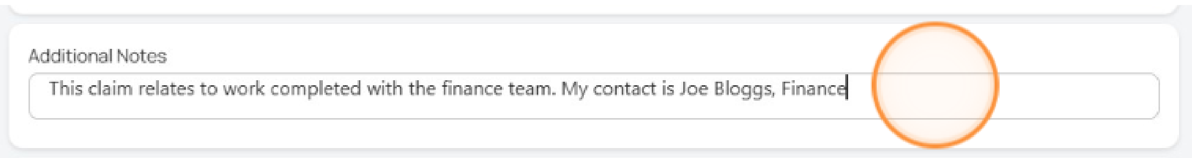
10. Your own document library should open. Locate the file you would like to attach and click 'Open'. You can attach multiple documents. If the documents are separate, you will need to upload them one-by-one.



11. Your attachment will become attached to your claim at the point of saving or submitting for approval.

Section 4: Additional Notes

This is a free text field. You can enter any further information that will support your claim. An approver will see the information entered into this field. It is important to include the name or department of your contact at the RCP or Federation. Although this information was entered during your account setup, it may have changed or may not be relevant for your current claim. The RCP Expenses team will use this information to direct your claim to the appropriate approver.



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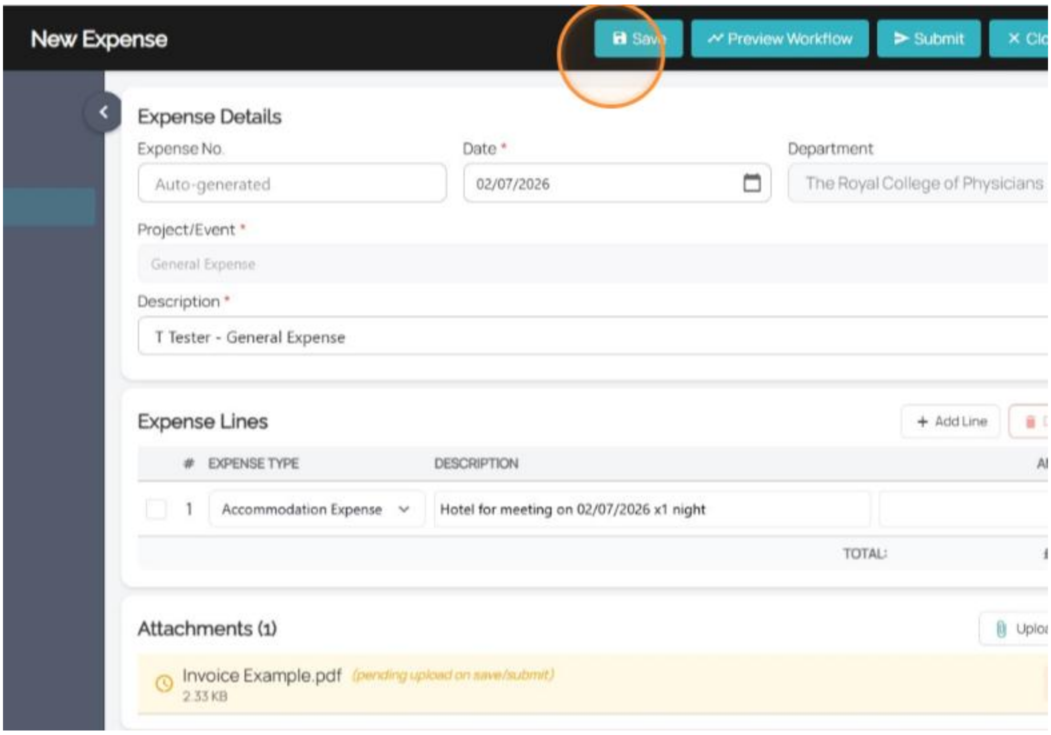
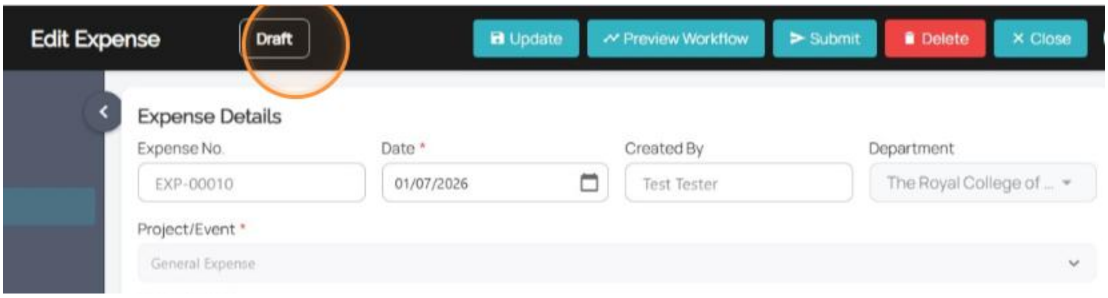
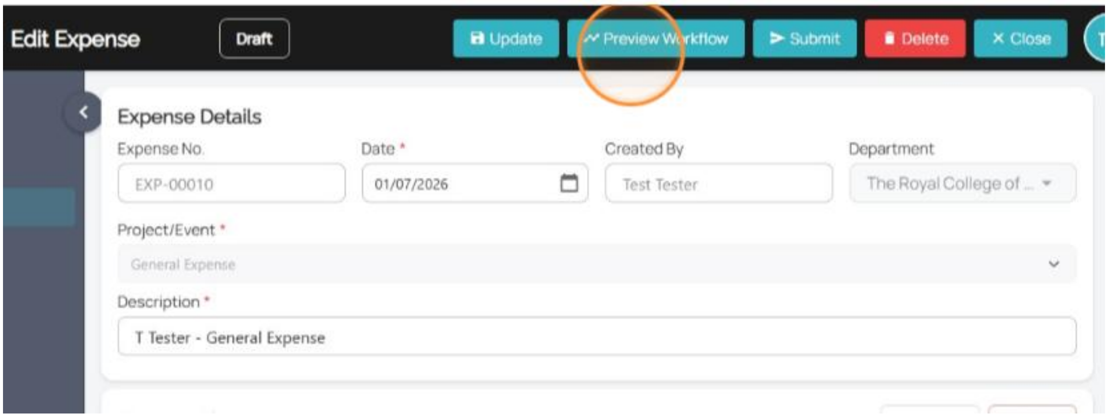
12. Now that you have completed all of the information, you can save your claim using the button at the top of the screen.



The system will now assign your claim a unique expense number and your claim will be at 'Draft' status.



You can also preview the workflow to check who your claim will go to for approval once submitted.



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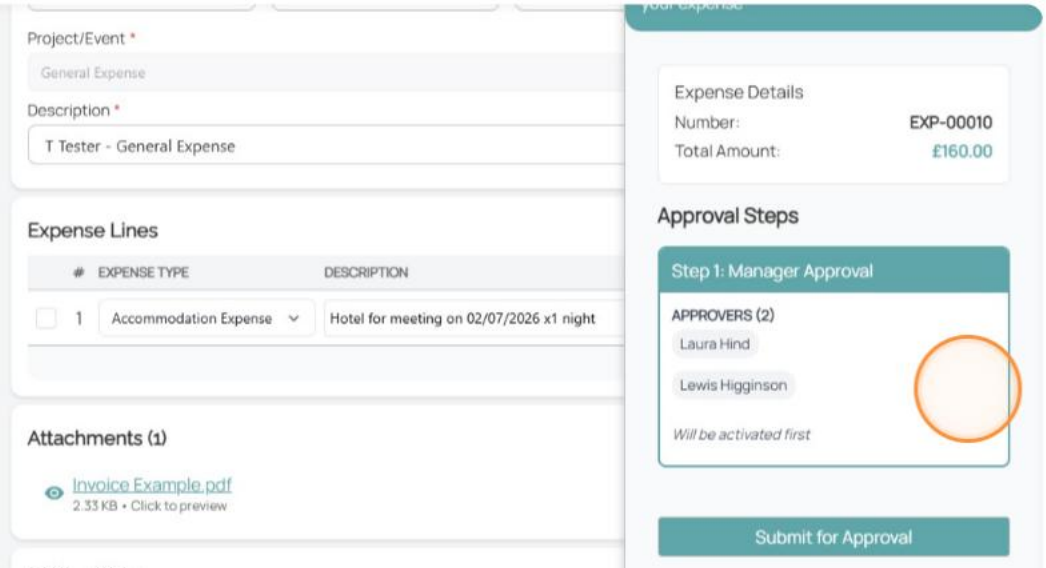
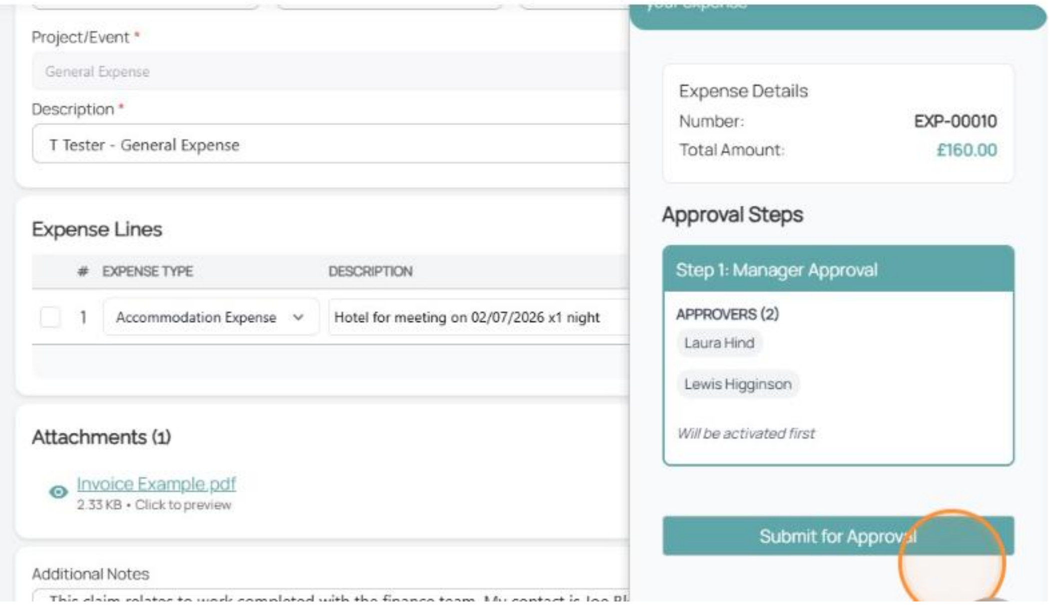
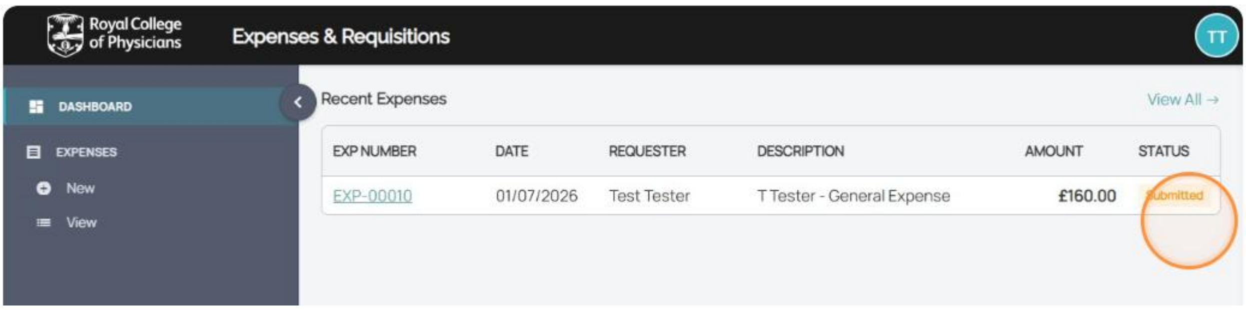


When you are ready, you can now submit your claim for approval.



If you navigate back to your Dashboard screen, you will be able to check the status of your claim.



Alternatively, you can click on ‘View’ in the menu bar to filter your claims by the different stages in the process.