



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](#)

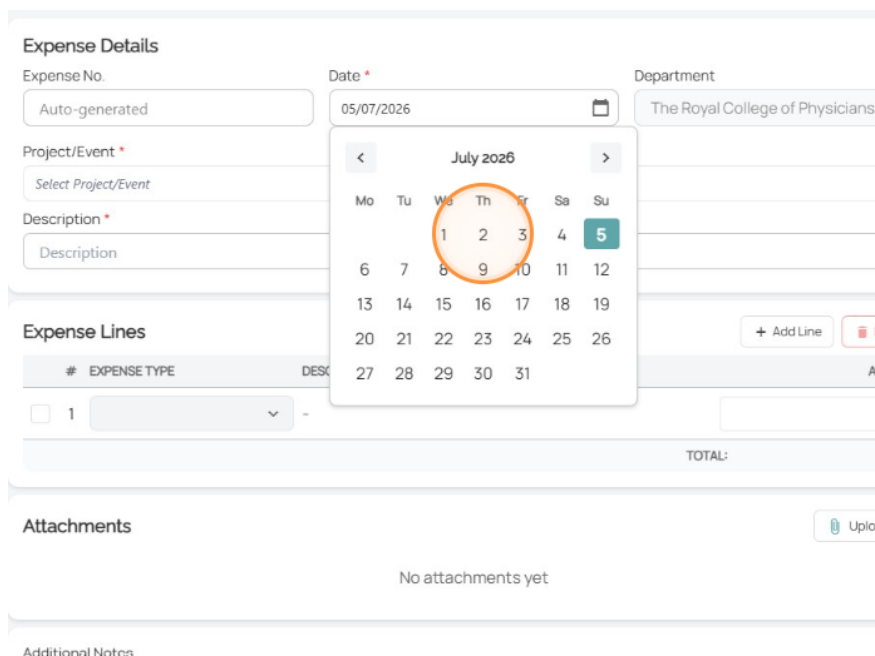
For both Royal College of Physicians and Federation business, all claims must:

- 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 system 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

- 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.

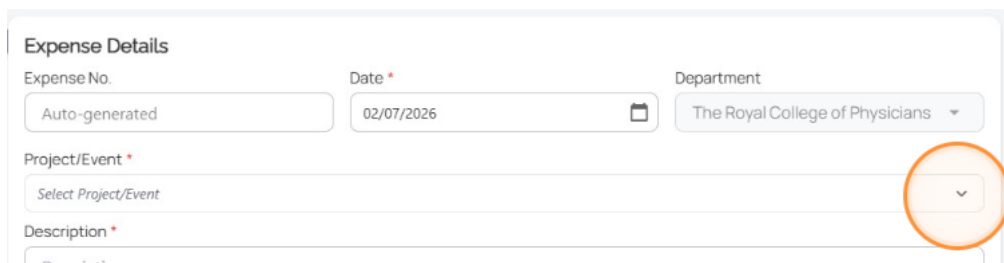


The screenshot shows the 'Expense Details' form. The 'Date' field is set to 05/07/2026. A date picker calendar for July 2026 is open, showing the days of the week (Mo to Su) and the dates (1 to 31). The date 05 is highlighted with an orange circle. The 'Department' field is set to 'The Royal College of Physicians'. The 'Project/Event' field is set to 'Select Project/Event'. The 'Description' field is set to 'Description'. The 'Expense Lines' section shows a table with columns for #, EXPENSE TYPE, and DESCRIPTION. The first line is highlighted with an orange circle. The 'Attachments' section shows 'No attachments yet'. The 'Additional Notes' section is empty.

- 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:



The screenshot shows the 'Expense Details' form. The 'Date' field is set to 02/07/2026. The 'Department' field is set to 'The Royal College of Physicians'. The 'Project/Event' field is set to 'Select Project/Event'. The 'Description' field is set to 'Description'. The 'Project/Event' dropdown menu is open, showing a list of options. The first option is highlighted with an orange circle.

Typing:

Expense Details

Expense No. Date * Department

Project/Event *

- FED General Expense
Federation General Expense
- General Expense
General Expense

#	EXPENSE TYPE	DESCRIPTION	AMOUNT
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- 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.

Expense Details

Expense No. Date * Department

Project/Event *

Description *

Expense Lines + Add Line - Delete

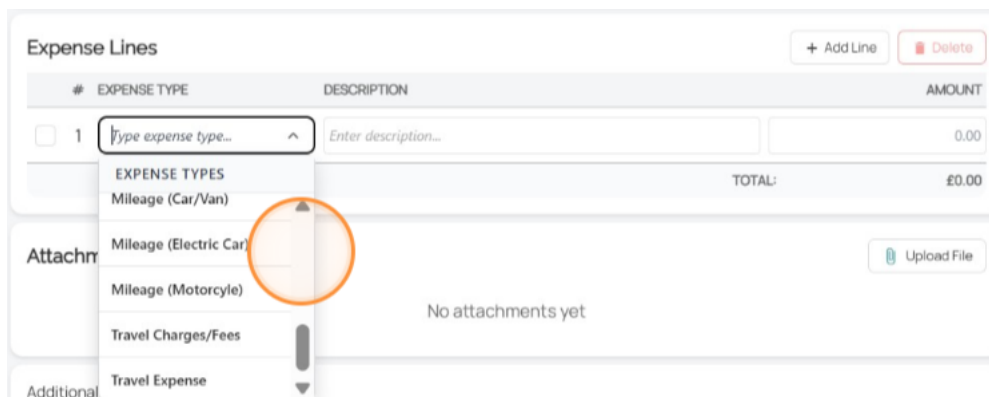
Section 2: Expense Lines

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.

Expense Lines + Add Line - Delete

#	EXPENSE TYPE	DESCRIPTION	AMOUNT
1	Type expense type...	Enter description...	0.00
TOTAL:			£0.00

- 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).



Expense Lines + Add Line Delete

#	EXPENSE TYPE	DESCRIPTION	AMOUNT
1	Type expense type...	Enter description...	0.00
TOTAL:			£0.00

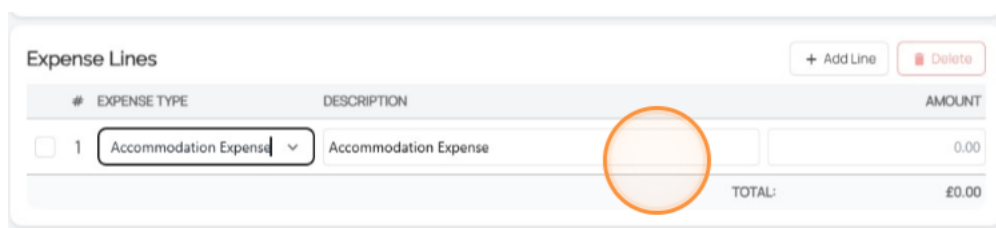
EXPENSE TYPES

- Mileage (Car/Van)
- Mileage (Electric Car)
- Mileage (Motorcycle)
- Travel Charges/Fees
- Travel Expense

Attachments: No attachments yet Upload File

- 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:

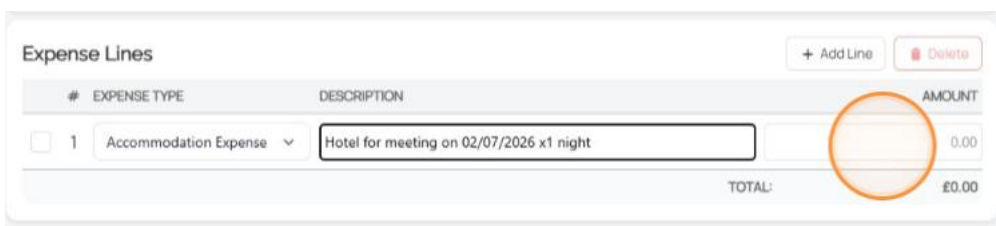
Default description:



Expense Lines + Add Line Delete

#	EXPENSE TYPE	DESCRIPTION	AMOUNT
1	Accommodation Expense	Accommodation Expense	0.00
TOTAL:			£0.00

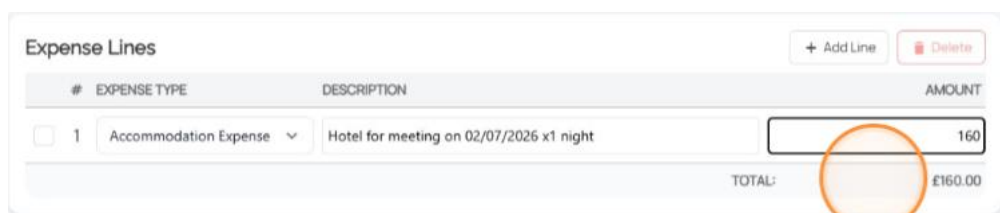
Description relevant to the claim:



Expense Lines + Add Line Delete

#	EXPENSE TYPE	DESCRIPTION	AMOUNT
1	Accommodation Expense	Hotel for meeting on 02/07/2026 x1 night	0.00
TOTAL:			£0.00

- 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.



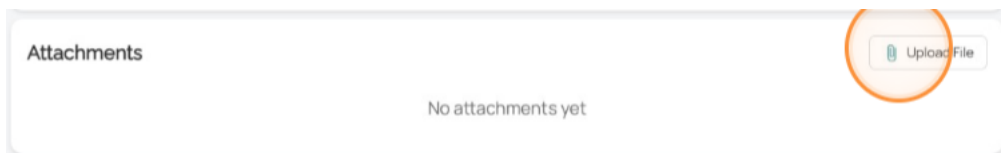
Expense Lines + Add Line Delete

#	EXPENSE TYPE	DESCRIPTION	AMOUNT
1	Accommodation Expense	Hotel for meeting on 02/07/2026 x1 night	160
TOTAL:			£160.00

Section 3: Attachments

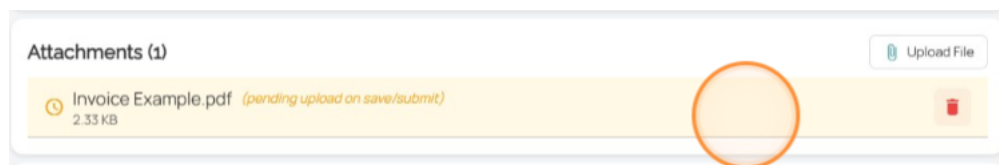
For your claim to be approved, it is vitally important to include any attachments that are relevant to your claim. We ask that you attach evidence such as a **dated and itemised receipt** that is scanned or photographed and attached using one of the systems supported formats (BMP, PNG, GIF, JPEG, TIFF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

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



The screenshot shows a box titled 'Attachments' with the text 'No attachments yet' in the center. In the top right corner, there is a button labeled 'Upload File' with a document icon. This button is circled in orange.

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.

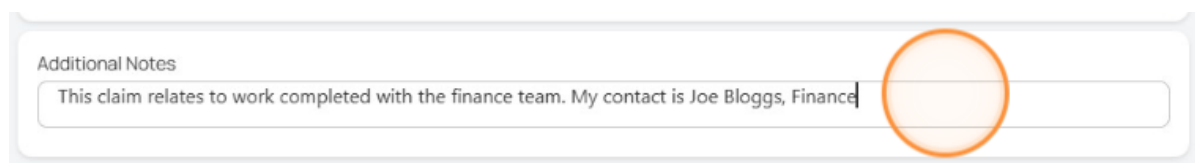


The screenshot shows the 'Attachments (1)' section. It contains a yellow bar representing an upload in progress for 'Invoice Example.pdf' (2.33 KB). The status is '(pending upload on save/submit)'. A circular progress indicator is visible on the right side of the bar and is circled in orange. An 'Upload File' button is also present in the top right.

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.



The screenshot shows a box titled 'Additional Notes'. It contains a text input field with the text 'This claim relates to work completed with the finance team. My contact is Joe Bloggs, Finance'. A circular focus indicator is placed over the end of the text field.

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

New Expense

[Save](#) [Preview Workflow](#) [Submit](#) [Close](#)

Expense Details

Expense No. Date Department

Project/Event

Description

Expense Lines

#	EXPENSE TYPE	DESCRIPTION
1	Accommodation Expense	Hotel for meeting on 02/07/2026 x1 night

TOTAL: £

Attachments (1)

Invoice Example.pdf (pending upload on save/submit)
2.33 KB

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

Edit Expense

[Draft](#) [Update](#) [Preview Workflow](#) [Submit](#) [Delete](#) [Close](#)

Expense Details

Expense No. Date Created By Department

Project/Event

Description

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

Edit Expense

[Draft](#) [Update](#) [Preview Workflow](#) [Submit](#) [Delete](#) [Close](#)

Expense Details

Expense No. Date Created By Department

Project/Event

Description

Project/Event *

General Expense

Description *

T Tester - General Expense

Expense Lines

#	EXPENSE TYPE	DESCRIPTION
1	Accommodation Expense	Hotel for meeting on 02/07/2026 x1 night

Attachments (1)

[Invoice Example.pdf](#)
2.33 KB • Click to preview

Expense Details

Number: EXP-00010

Total Amount: £160.00

Approval Steps

Step 1: Manager Approval

APPROVERS (2)

Laura Hind

Lewis Higginson

Will be activated first

Submit for Approval

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

Project/Event *

General Expense

Description *

T Tester - General Expense

Expense Lines

#	EXPENSE TYPE	DESCRIPTION
1	Accommodation Expense	Hotel for meeting on 02/07/2026 x1 night

Attachments (1)

[Invoice Example.pdf](#)
2.33 KB • Click to preview

Additional Notes

This claim relates to work completed with the finance team. My contact is Joe Bl...

Expense Details

Number: EXP-00010

Total Amount: £160.00

Approval Steps

Step 1: Manager Approval

APPROVERS (2)

Laura Hind

Lewis Higginson

Will be activated first

Submit for Approval

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

Royal College of Physicians

Expenses & Requisitions

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DASHBOARD

EXPENSES

New

View

Recent Expenses

View All →

EXP NUMBER	DATE	REQUESTER	DESCRIPTION	AMOUNT	STATUS
EXP-00010	01/07/2026	Test Tester	T Tester - General Expense	£160.00	Submitted

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

