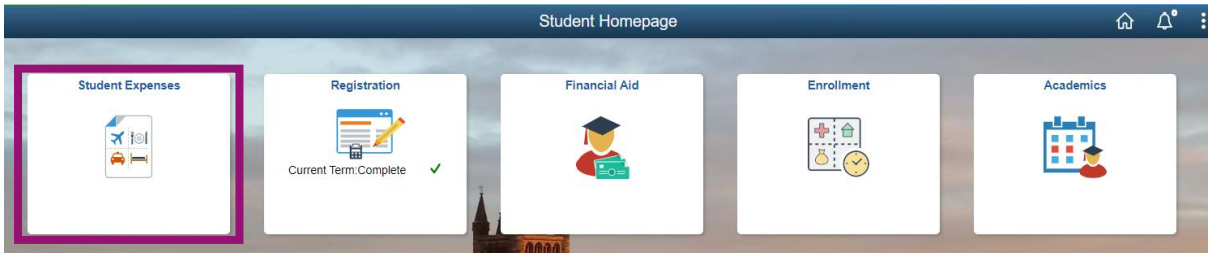
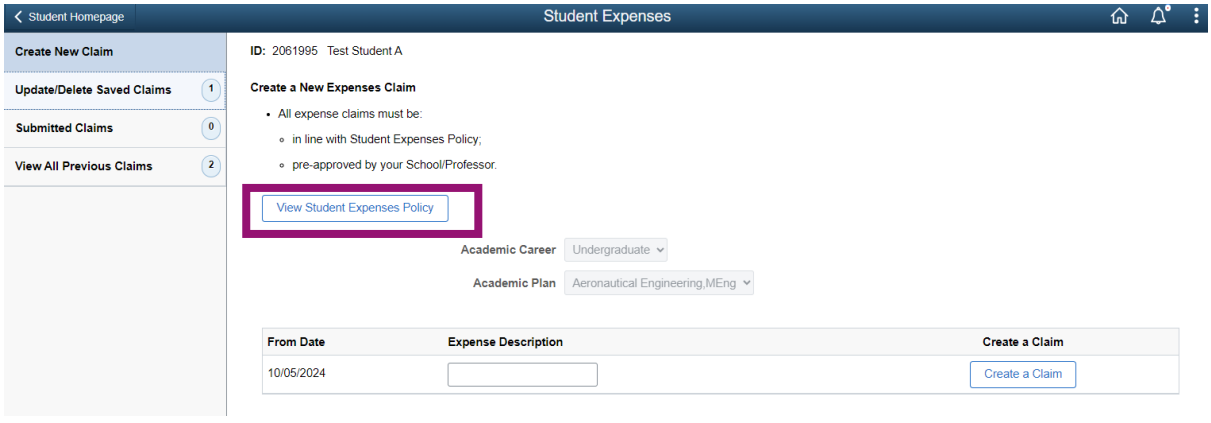
MyCampus Student Expenses Process

Upon logging into your Student Homepage, you can access the new Student Expenses claim process using the Student Expenses tile.



Upon entering the tile, you will see 4 sections:
*__Create a New Claim__ – this is the section where you would create an expenses claim for submission;
*__Update/Delete Saved Claims__ – this section will hold claims that have been started/saved but have not yet been submitted for approval, and claims that have been rejected by School staff whereby students are able to amend and re-submit;
*__Submitted Claims__ – this section will hold all claims that have been submitted for approval, with the status of the claim being continuously updated during the claim process;
*__View All Previous Claims__ – this section will hold claims that have been fully approved and the refund has been processed, and claims that have been rejected outright by School staff (where these rejected claims cannot be amended/re-submitted).

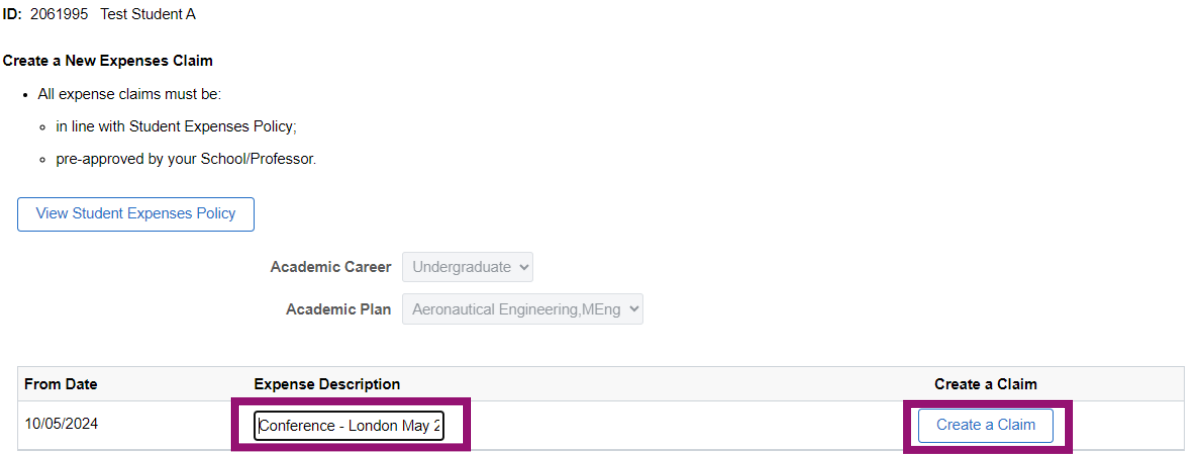
Creating a New Claim



Please ensure you are familiar with the Student Expenses policy before submitting a claim. For ease, you can access the policy using the View Student Expenses Policy button.

If you only have one Academic Career/Academic Plan on your MyCampus student record, this information will automatically default into the Career/Plan fields. If you have more than one Career and/or Plan on your record, please select both the Career and Academic Plan you wish to make the expenses claim against.

To create a claim, enter an Expense Description and press the Create a Claim button. Please make this Expense Description as clear as possible for staff to identify the nature of the expense being claimed, i.e., Conference – London May 2024.

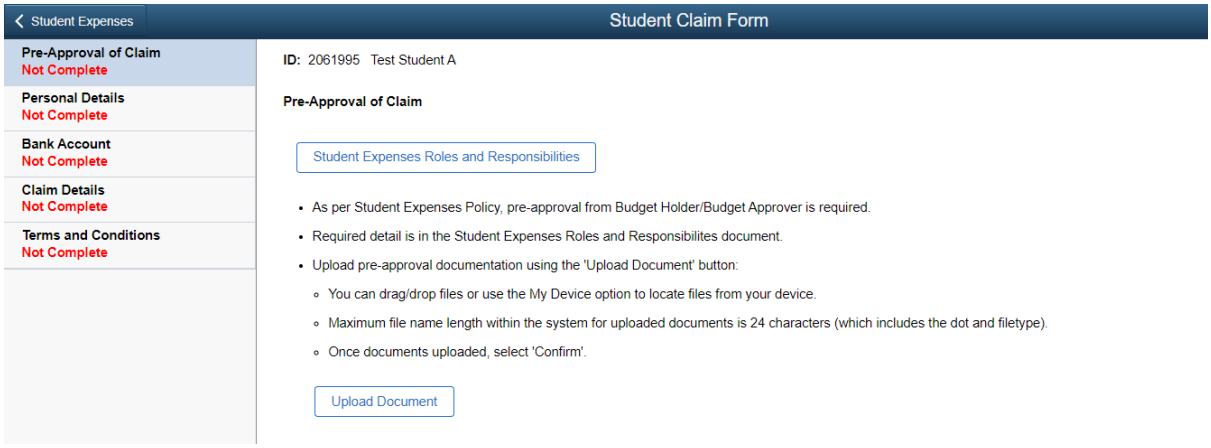


Once you have entered the Expense Description, you click on Create a Claim. Your claim form will be created and automatically saved and you can now begin to complete the form for submission.

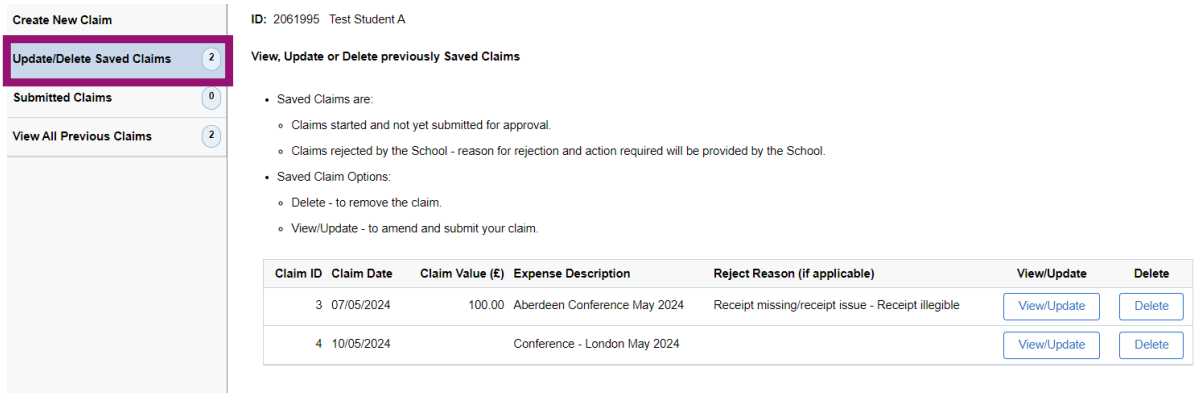
There are five sections to be completed before you can submit your claim and you can complete the first four sections in any order.

*Pre-Approval of Claim;
*Personal Details:
*Bank Account;
*Claim Details;
*Terms & Conditions

The fifth and final section 'Terms and Conditions' cannot be completed until Sections 1-4 are marked as 'Complete'; it is only at this point with all sections completed that you will be able to submit your claim. If you need further help as you progress through the form, you can access information by using the icon.

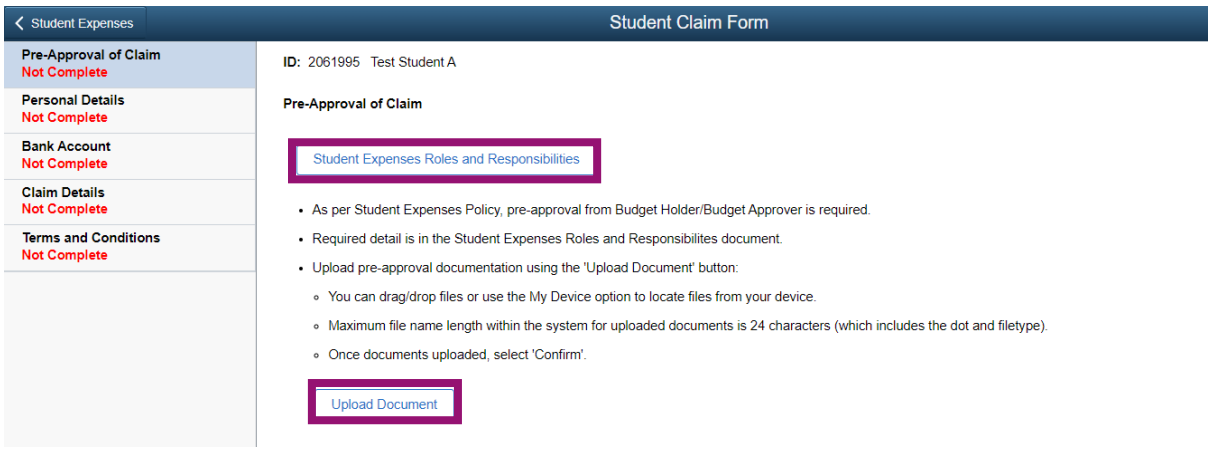


You can exit the claim at any point – the claim will automatically save and you can access/update the claim at any point within the Update/ Delete Saved Claims section (by pressing the View/Update button).



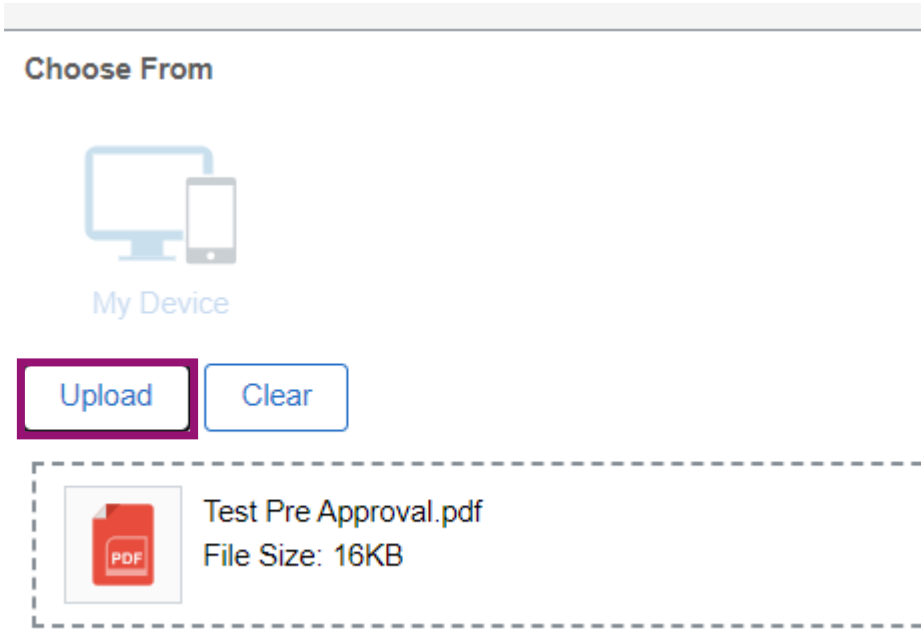
Pre-approval Page

Please ensure you're familiar with the process and what's required of you – you can refer to the Roles and Responsibilities document if required by using the button at the top of the page.

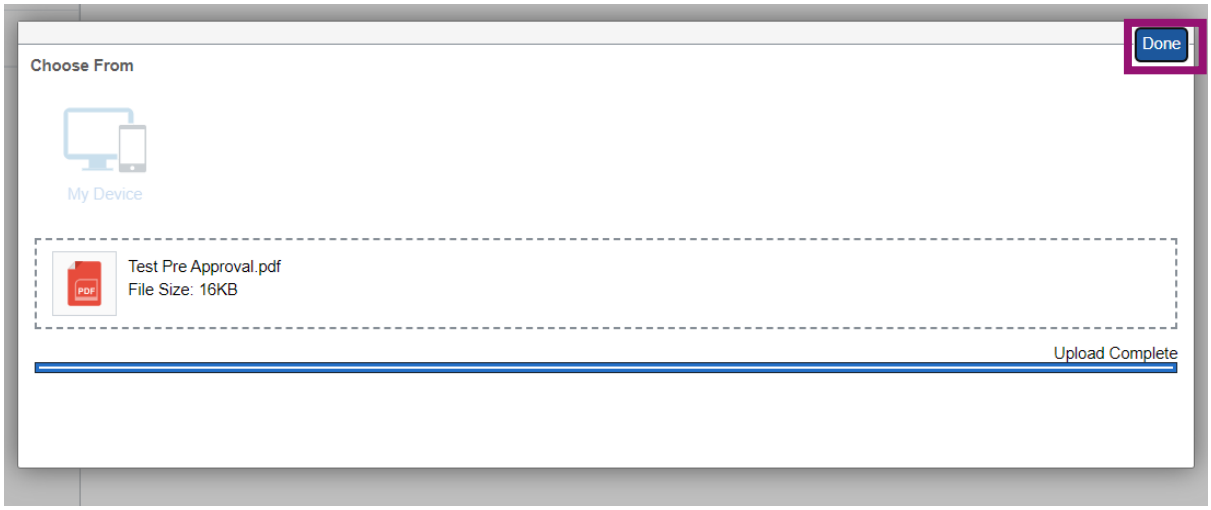


For any claim to be successful, it is vital that you have pre-approval documentation from your budget holder, this will normally be an email or pdf. Again, for more details of what information is required in the pre-approval, refer to the Student Expenses Roles and Responsibilities document.

To upload evidence of your pre-approval, use the Upload Document button. Use the My Device button to navigate to select your document and press Upload. Uploading documents can be done both by 'drag and drop' or by navigating to the document and uploading.

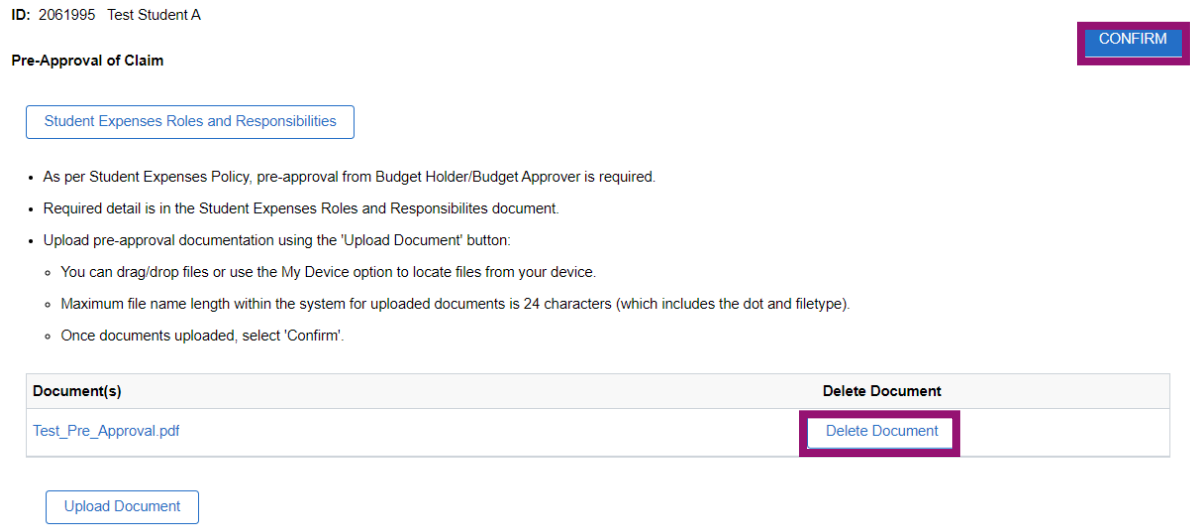


When your document has successfully uploaded, press Done to return to the pre-approval page. Don't forget this final step, otherwise the document will not be captured!

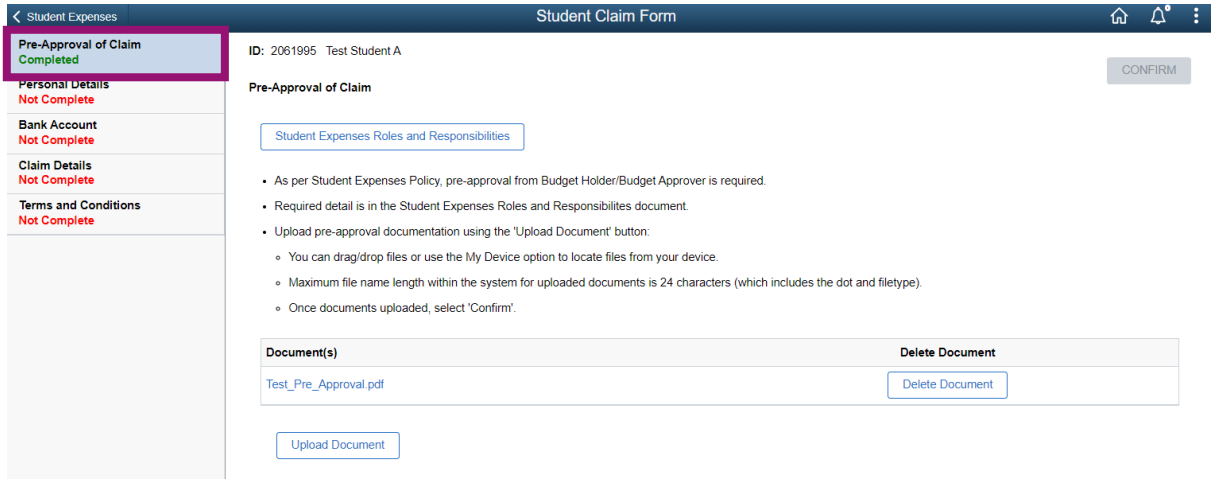


You can upload more than one document if required and can delete documents if you've made an error (using the Delete document button). You must have at least one document uploaded in order to be able to mark this section as complete.

The system will accept all file types for upload, but note that the maximum file name length the system can accept is 24 characters (which includes the dot and filetype).



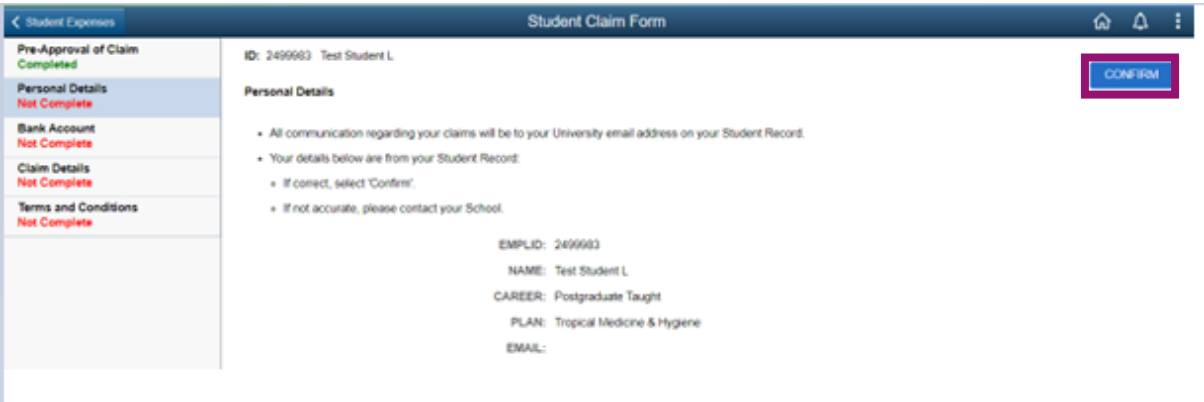
If you are happy that you've completed the section, press Confirm.This will mark the page as having been completed.



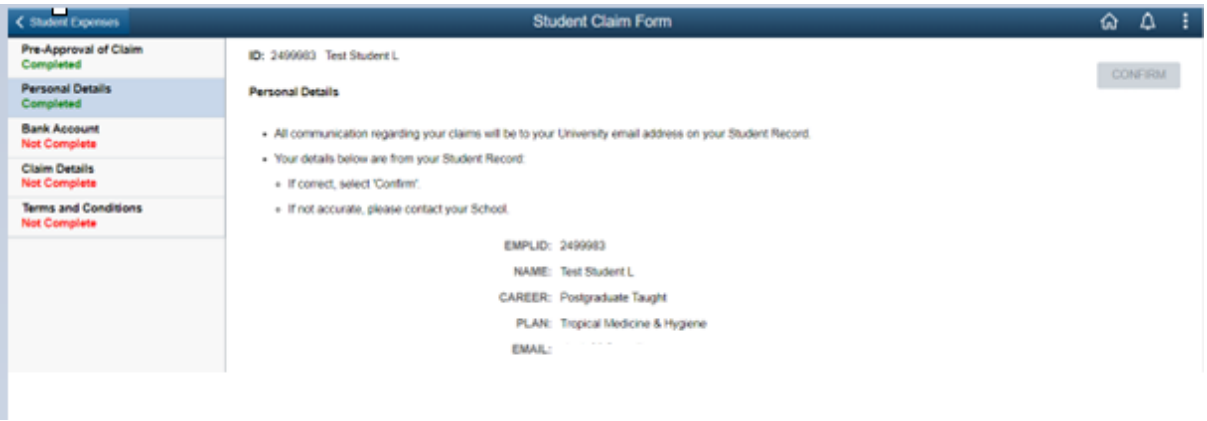
Personal Details Page

This page will automatically populate details from your student record and it is important that this is accurate. If anything is incorrect, please raise a helpdesk request to have your record updated.

If you are happy that the details are correct, press Confirm and this will complete the Personal Details section.



The page should now be marked as having been completed.



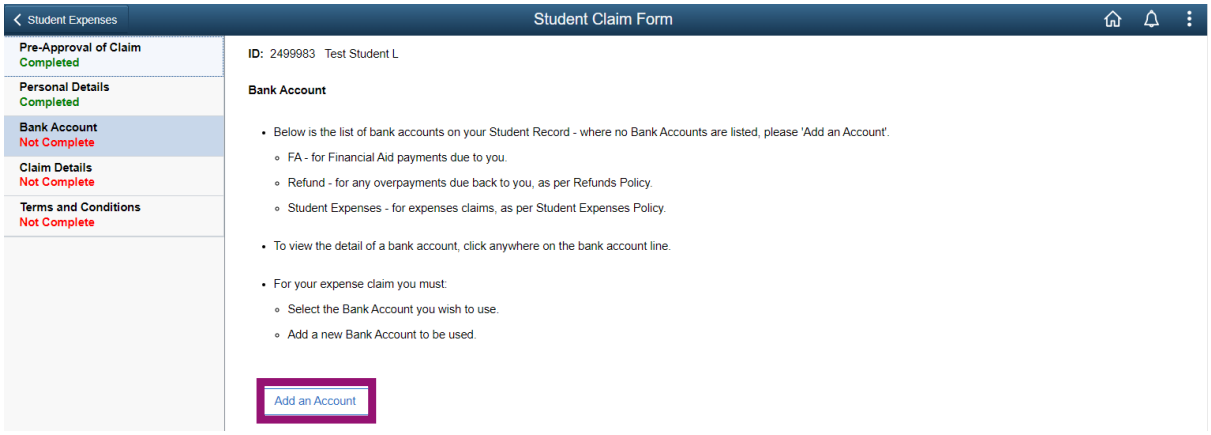
Bank Account Page

This page allows you to select which bank account you want your expense claim to be reimbursed to once its been approved. If you already have a bank account attached to your record, it will be shown here.

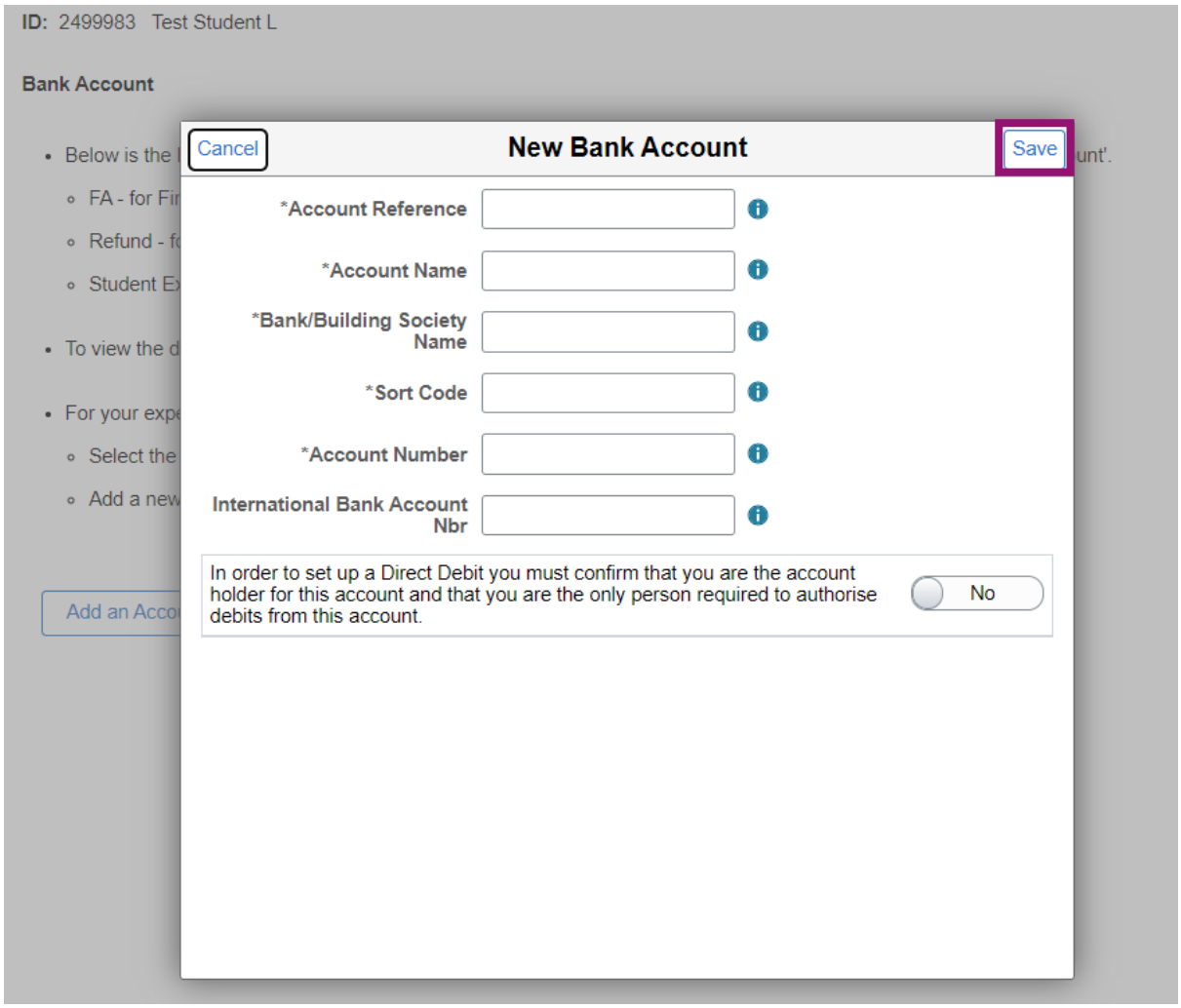
If you don't have a bank account already attached to your student record, you can either add account details directly through the bank account page on the expense claim form (using the Add an Account button) or you can add using the option in the Finances homepage tile/Bank Account section (this then automatically updates bank account information on any saved or new claims created in the Student Expenses tile).

No Bank Account Information Held

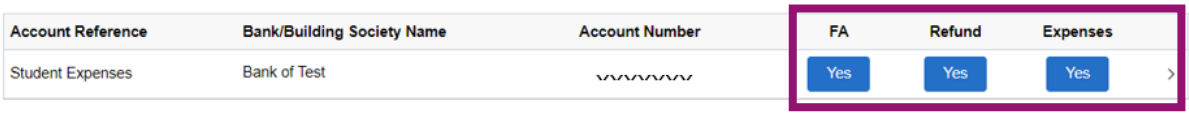
If you don't already have a bank account attached, you can add an account using the Add an Account button.



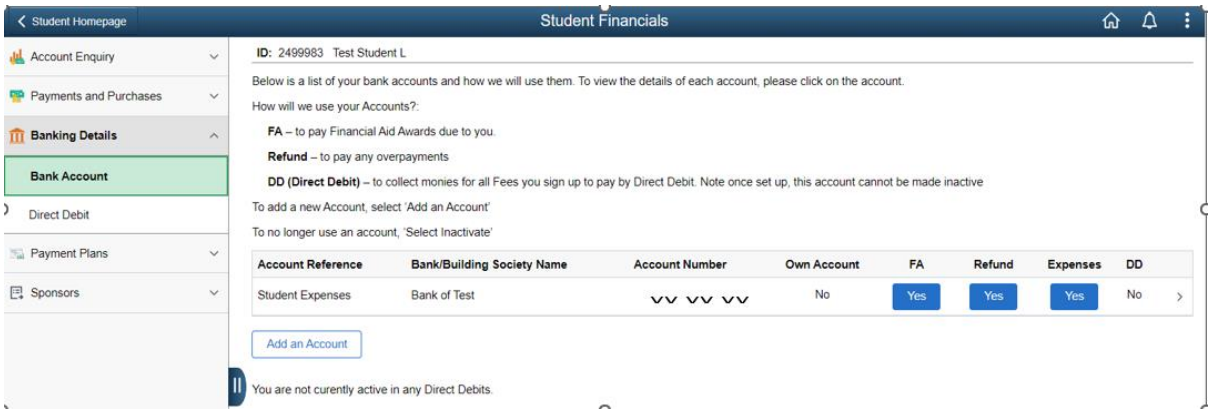
Add in the relevant details in the pop up page and press Save when you're done.



The system requires you to have at least one bank account designated for Financial Aid (FA) and Refunds so if you enter a bank account for the first time, all three uses (FA, Refund and Expenses) will be selected for this account.

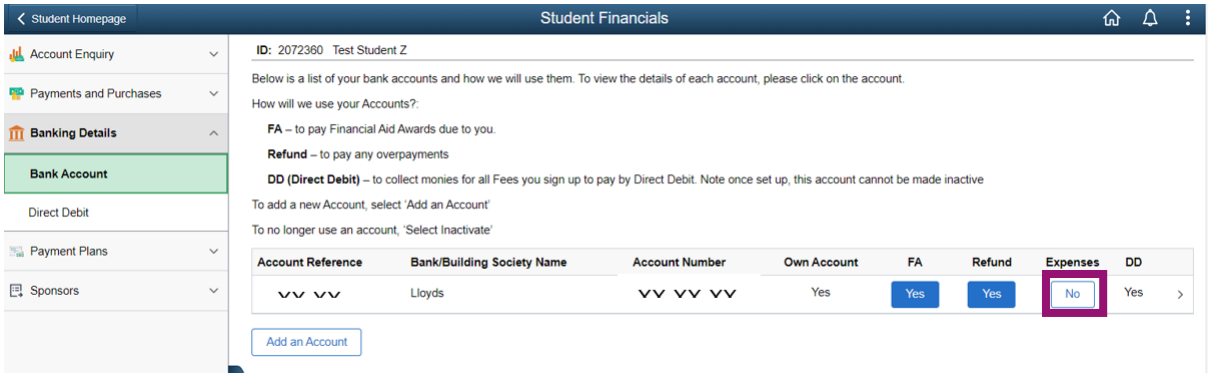


Your Finances tile in the homeage will also be updated with the same bank account information

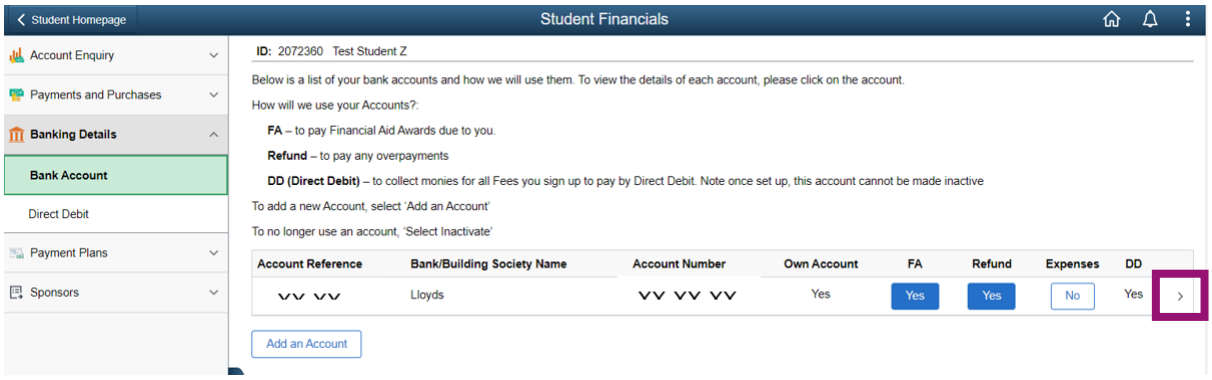


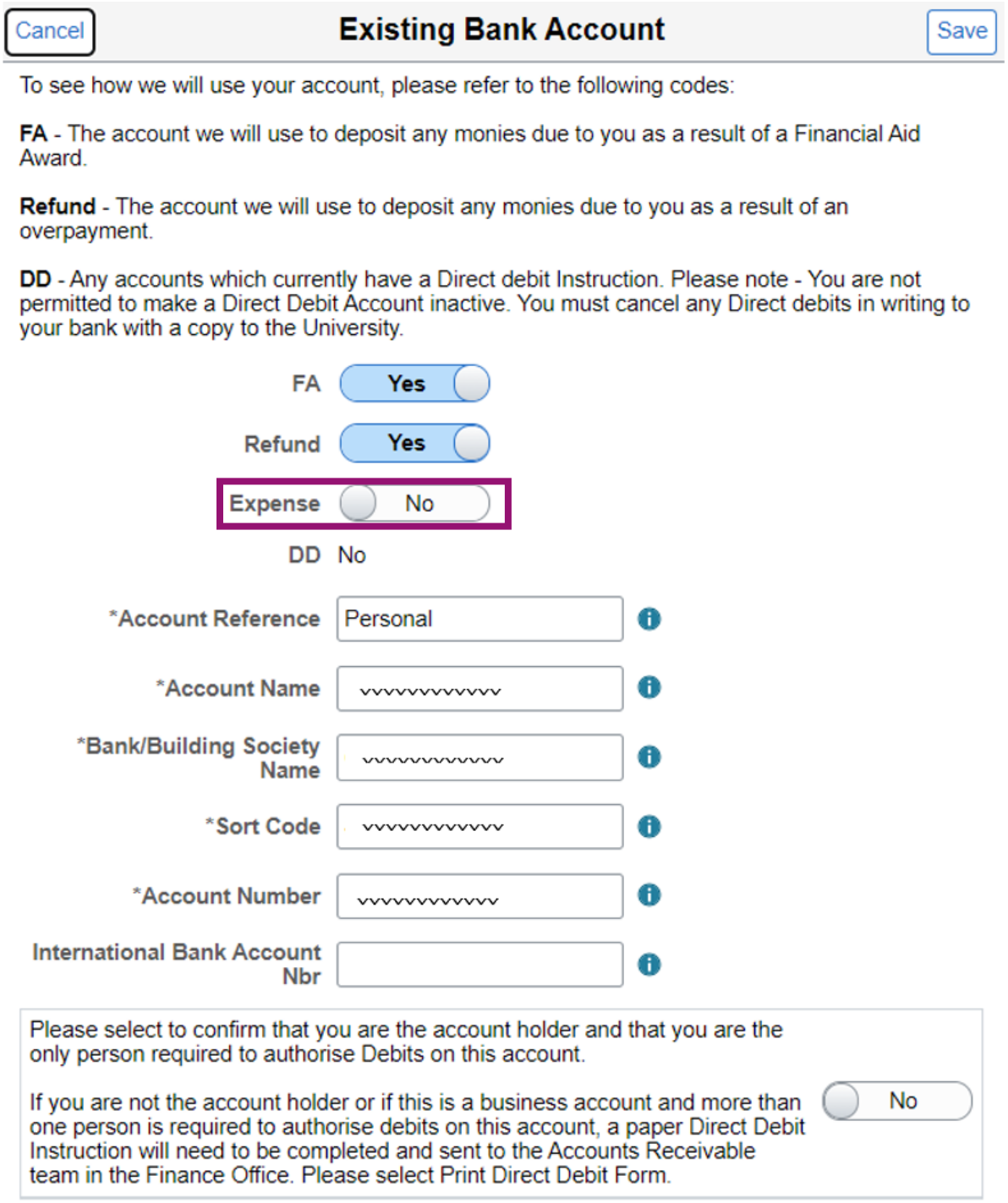
<u>Existing Bank Account Information Held</u>

If you already have an account attached to your record but you haven't chosen an account for expense claim reimbursement yet, you can choose this account pressing the No button under Expenses to change to a Yes

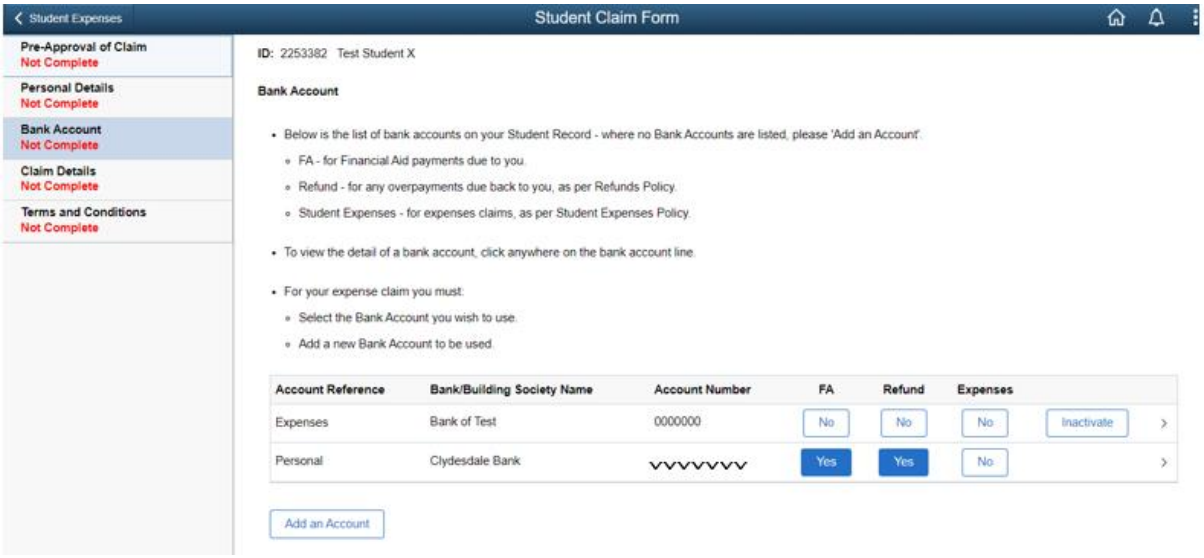


Or you can enter into the detail of the account by clicking anywhere on the line (or on the arrow at the end of the line indicated) to open up the details page and use the toggle button next to Expenses to change to Yes.



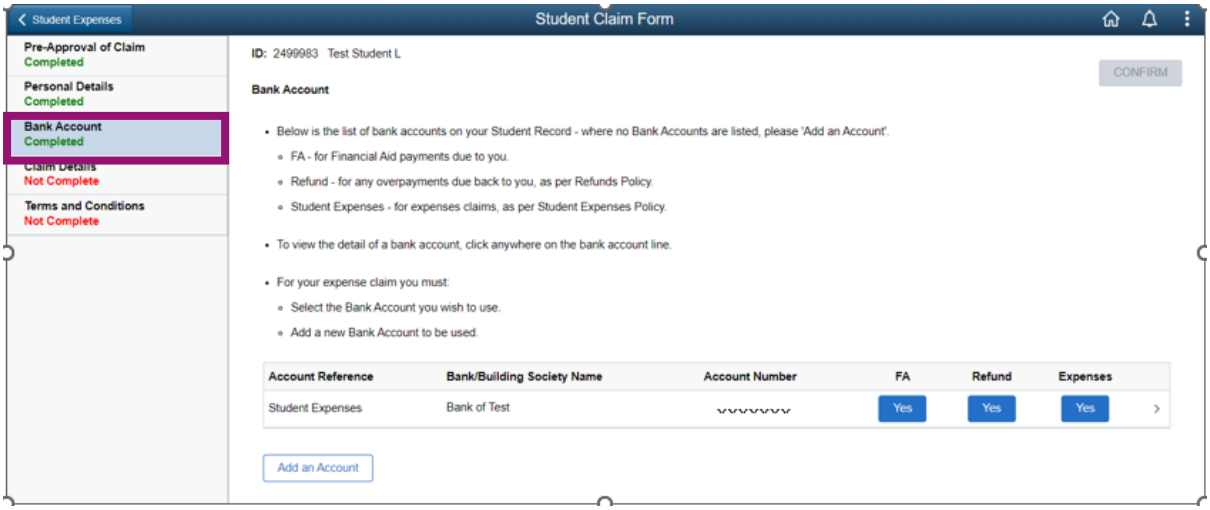


If you want your expenses to be reimbursed to a new account, you can add a new account using the Add an Account button and then select that account using the above process.



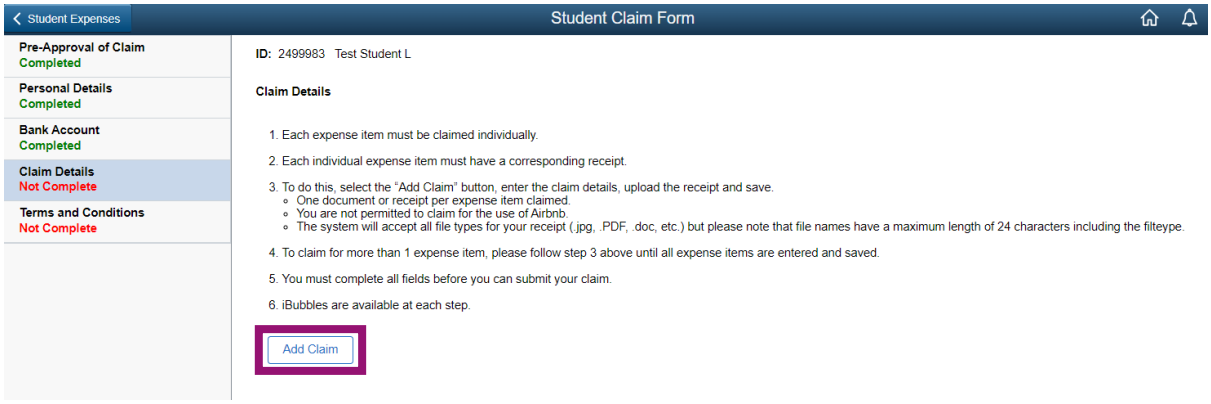
If you have more than one account noted on the bank account page, and chose to have all types of reimbursement to the one bank account (FA, Refund and Expenses), you will have an option to 'Inactivate' the bank account line not being used. If you choose to inactivate an account, this will again update within the Finances Tile/Bank Account section.

Once you're happy with your bank account selection, press Confirm and the page will be marked as having been completed.

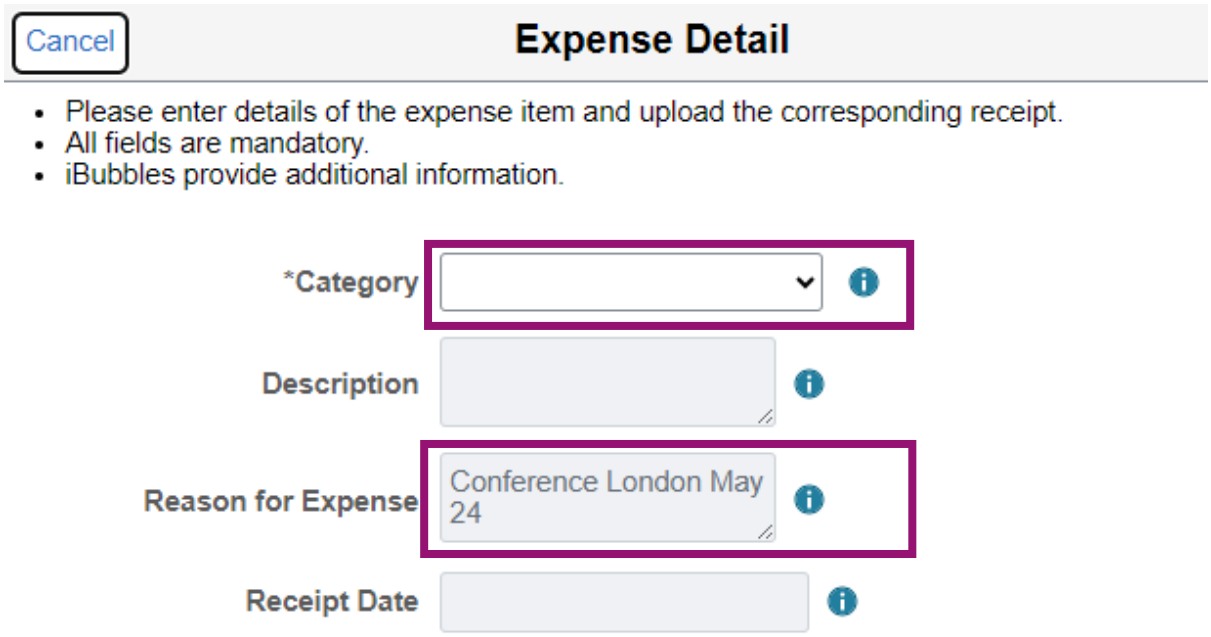


Claim Details Page

This page is where you'll add details and supporting receipts of all the items you're claiming reimbursement for. Please ensure you read all information on this page before starting the process of entering expense claim lines.

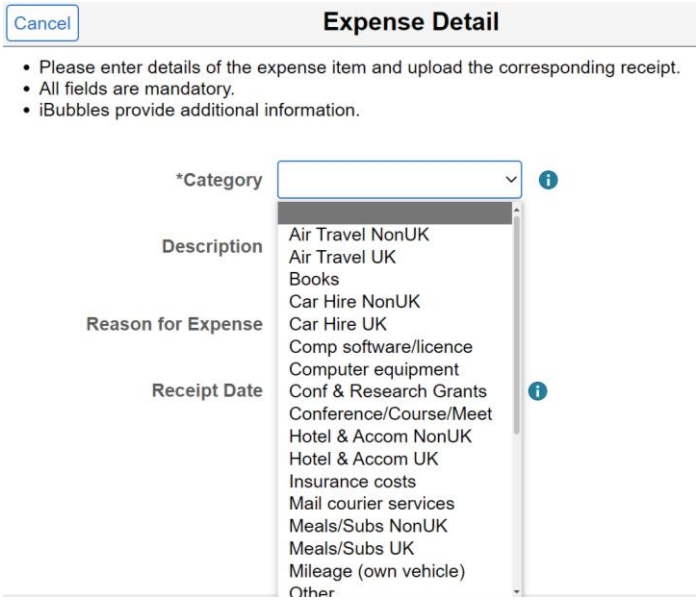


To add an expense item, use the Add Claim button. You'll be presented with a pop up page as follows:

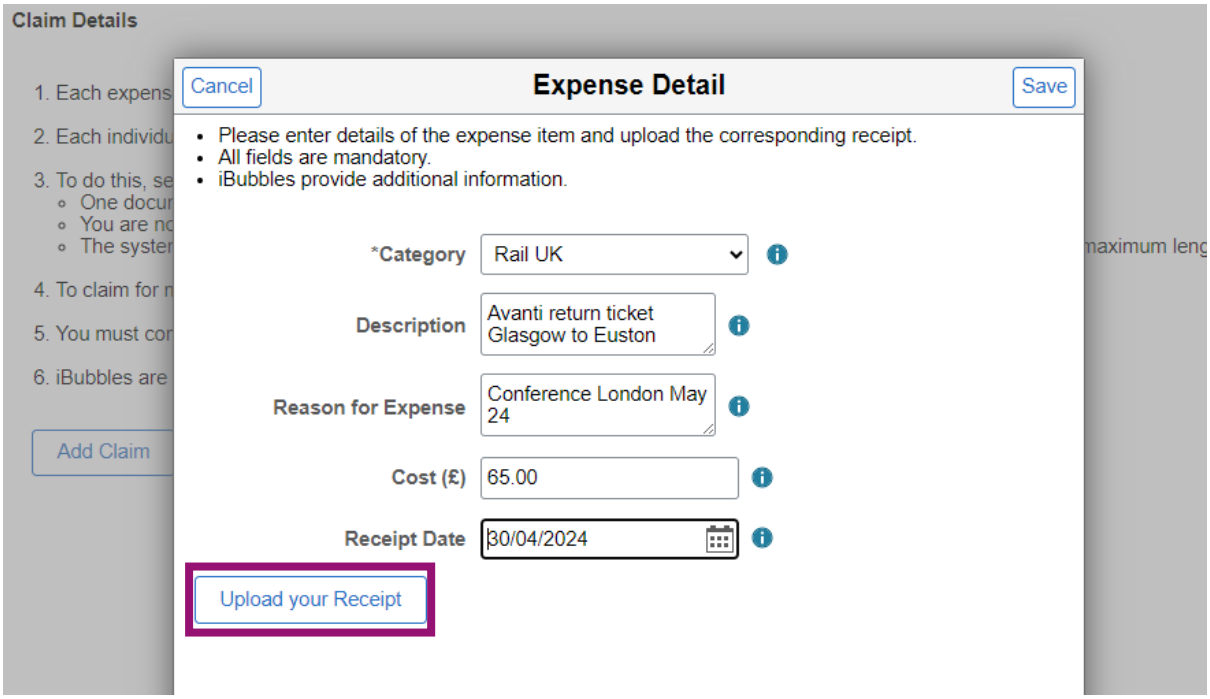


Note that the reason for expense is pre-populated for you based on what you entered as the Expense Description when you started the claim (if required, this be changed/amended once you have selected your Category of expense, which allows for all other fields to be populated).

The only field that you can edit initially is the Category. Select the drop down arrow to the right to see the categories that you can claim an expense against.



Once your category has been selected, you will be able to add information to the remaining fields and you can upload your receipt using the Upload your Receipt button.

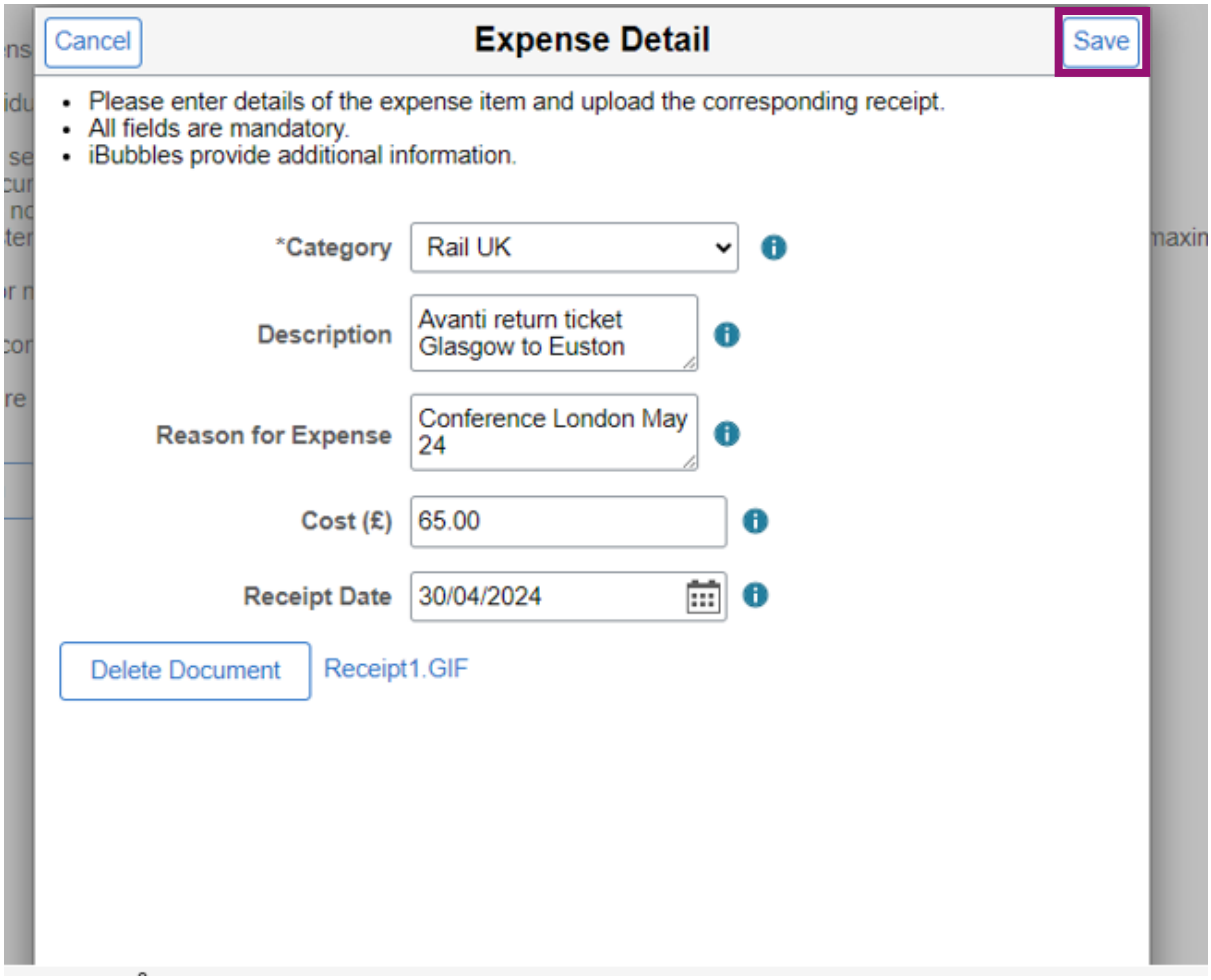


Ensure you make your Description as helpful as possible for approvers to be able to quickly identify what your expense is for.

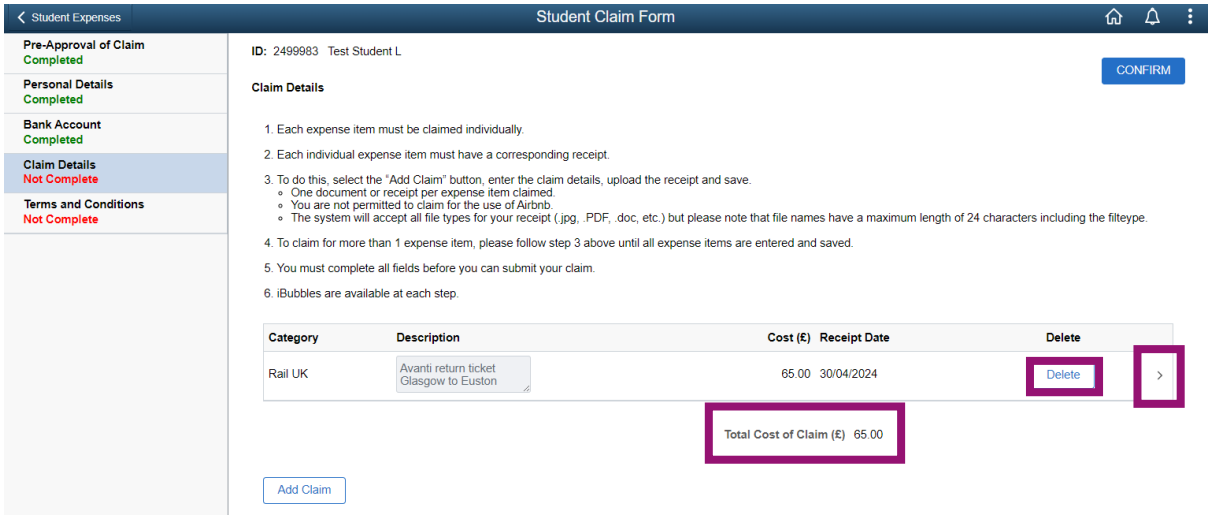
The Upload your Receipt function works exactly the same as the Upload functionality used within the Pre-Approval section (selected from file location/drag and drop file into pop-up window). Please note that only one file can be uploaded per individual line of expense (if you have multiple receipts related to the one expense line, these will need to be collated

into one document/upload).

The system will accept all file types for upload, but note that the maximum file name length the system can accept is 24 characters (which includes the dot and filetype).



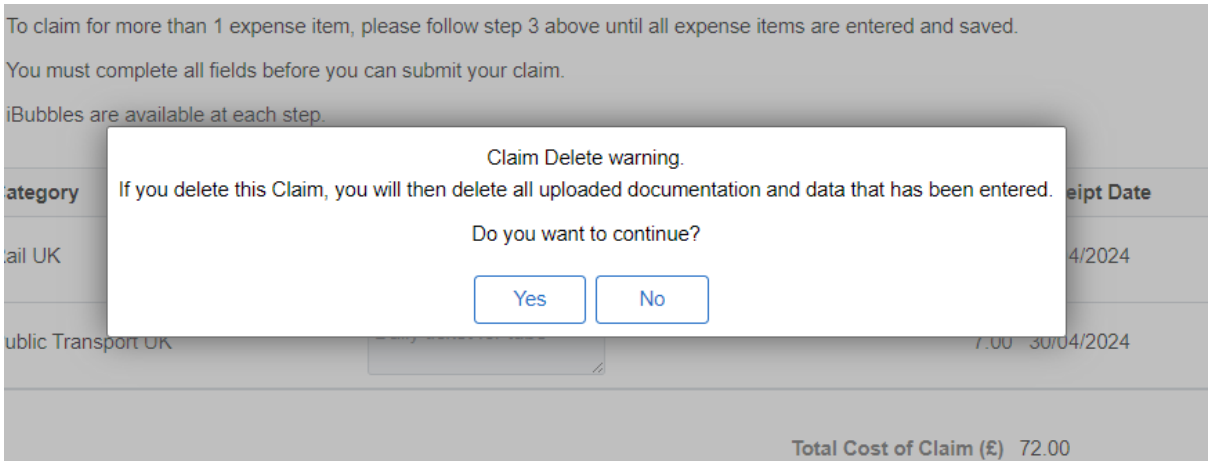
Once you've completed everything including adding your receipt, press the Save button to save and exit. You'll land back at the Claim Details page where you can then continue to add any other expense claim items using the Add Claim button again.



You will notice that once a line of expense is added, a running total of your claim cost is visible on this page. This field/cost will update as and when further expense lines are added to the claim.

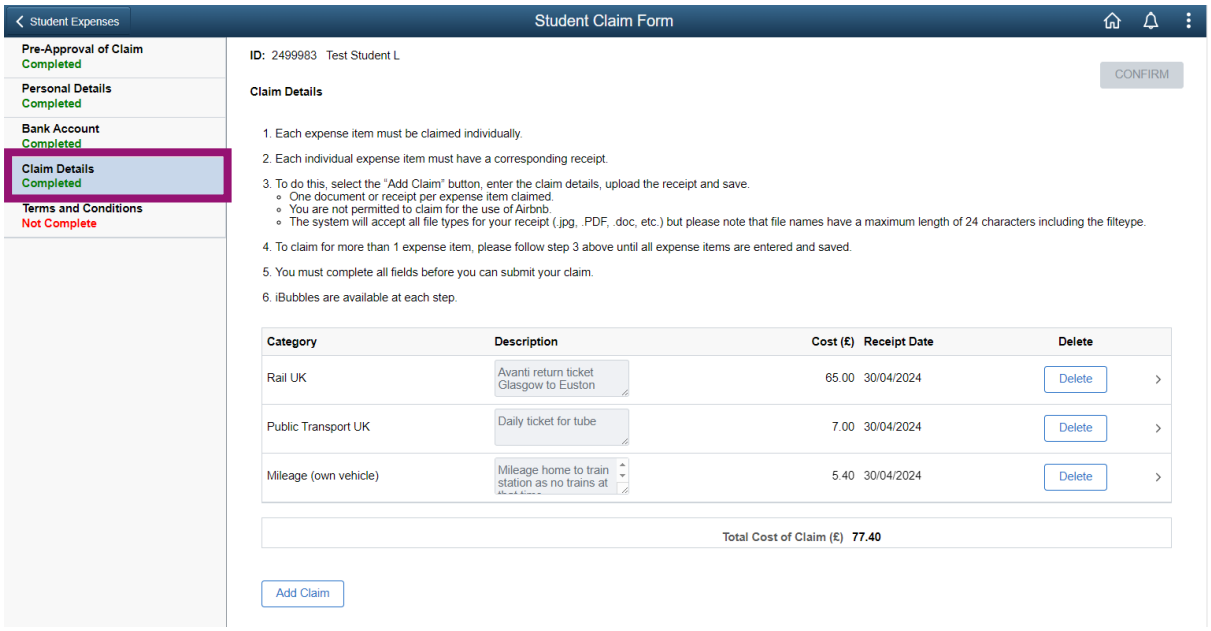
You can go back and edit any of the details within the individual claim lines by clicking anywhere on the row or using the arrow on the right of each line.

If you want to delete a claim line, press the Delete button. You'll be asked to confirm you want to delete.

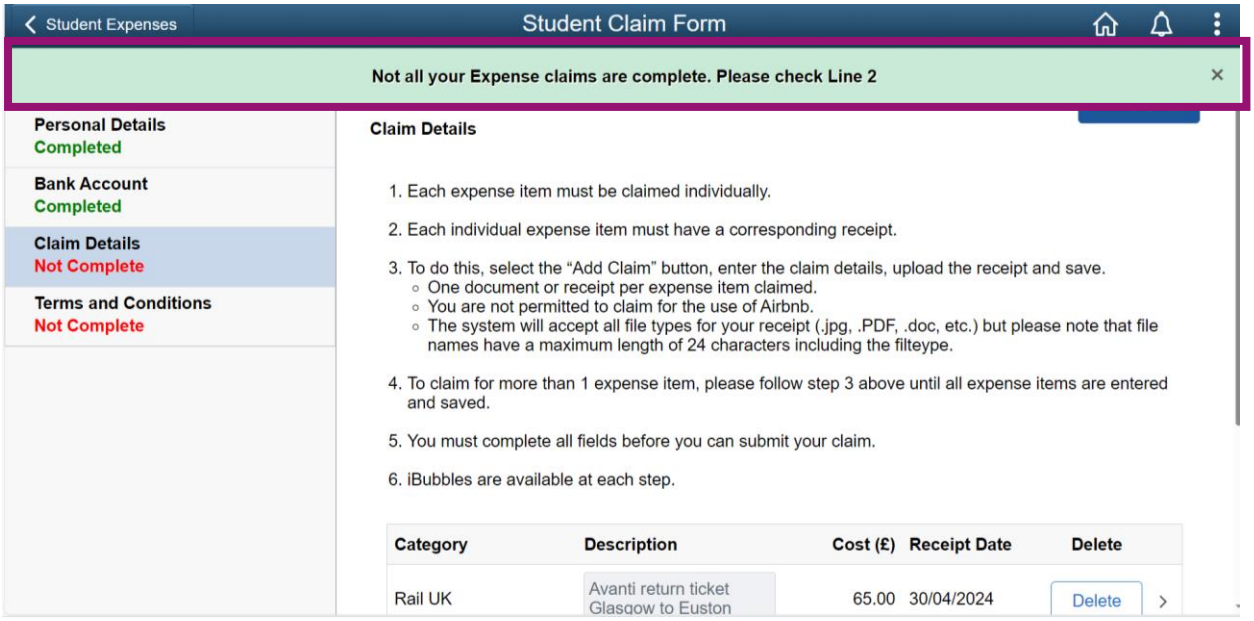


If you confirm you want to delete the claim line, you will then return to the claim details page where the item will have been removed.

If you have finished adding everything you wish to claim for, press the Confirm button and the page will be marked as having been completed.



If you haven't completed any of the claim lines properly e.g. have forgotten to attach a receipt or haven't added a receipt date, you'll get a message telling you which claim line has missing information.



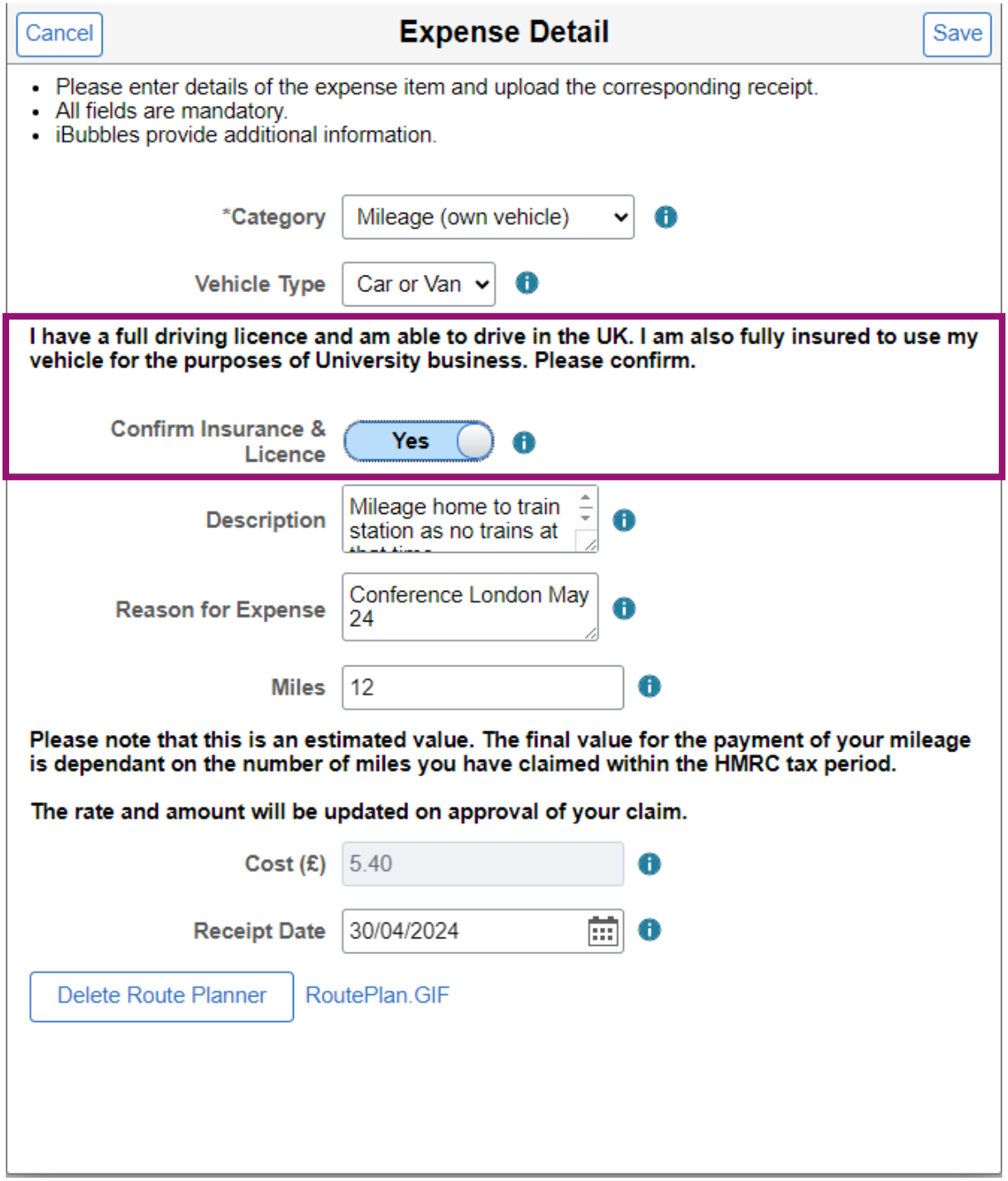
You can only complete the page once all fields have been completed for each claim line.

Note: Mileage Category

If you're claiming for mileage for a vehicle type of car/van or motorbike, you'll need to confirm that you are fully insured and have a licence to drive in the UK. You'll also need to upload a route planner to support your mileage claim.

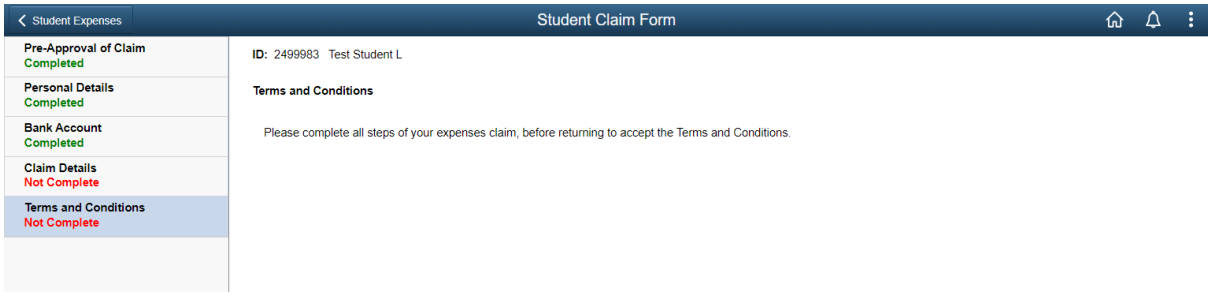
When you select your vehicle type, you will be asked to enter the number of miles you are claiming for – when the miles are entered, this will automatically calculate the cost of mileage on this line of expense for you (this cost field cannot be amended). Cost/rates of mileage have been built into MyCampus according to mileage rates published by HMRC:

https://www.gov.uk/government/publications/rates-and-allowances-travel-mileage-and-fuel-allowances/travel-mileage-and-fuel-rates-and-allowances

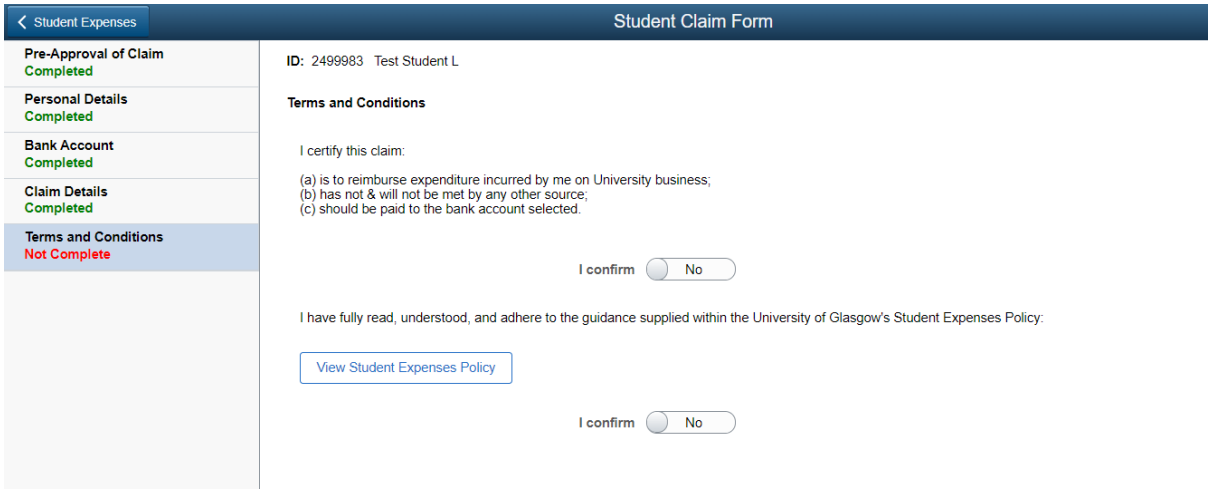


Terms and Conditions Page/ Submitting a Claim

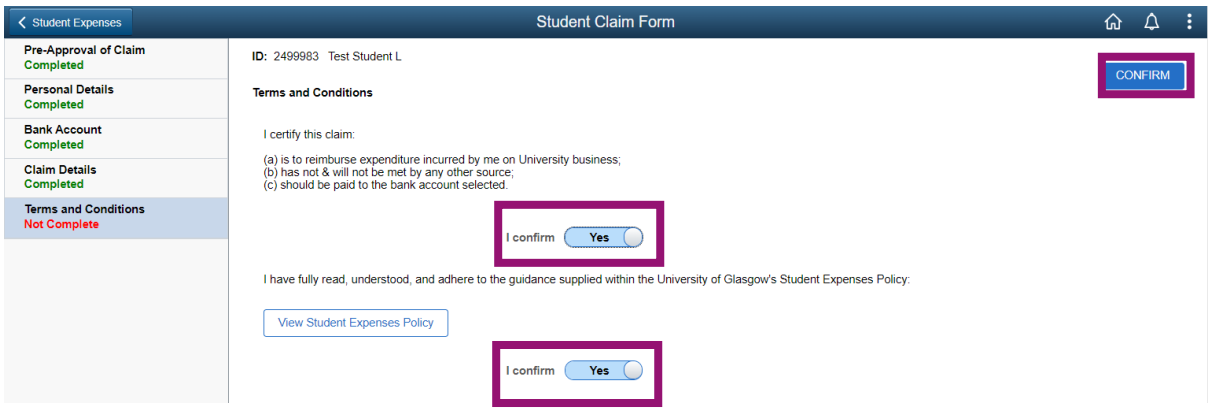
You will only be able complete the Terms and Conditions page when you have completed all four previous sections.



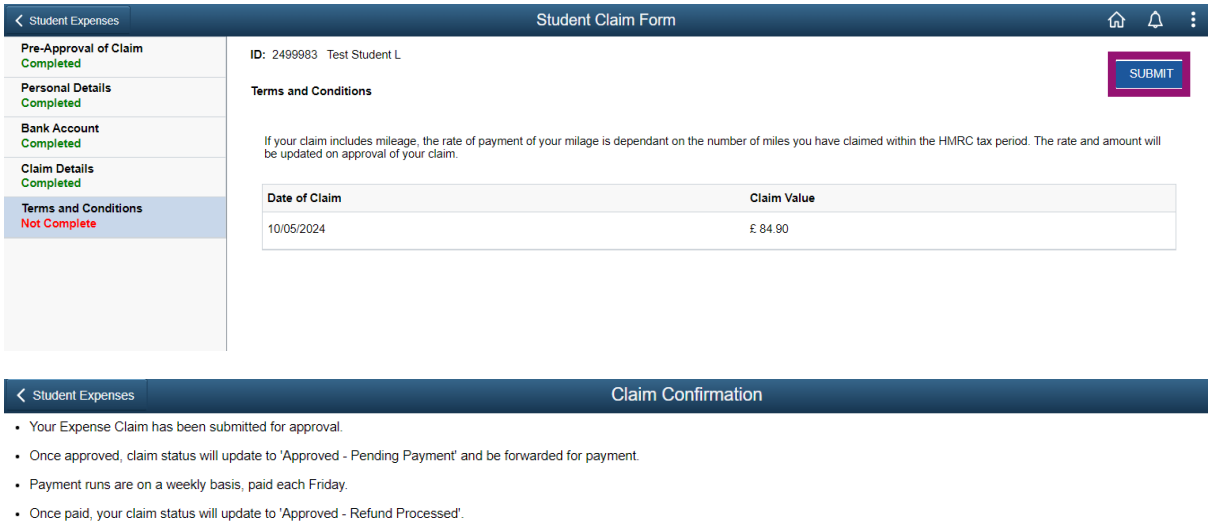
Once all four sections have been completed, you will see the Terms and Conditions certification page.



You will only be able to confirm the page as complete and move onto submitting the claim after you've confirmed yes to both attestations – by pressing the toggle button to Yes. Once done, press Confirm.



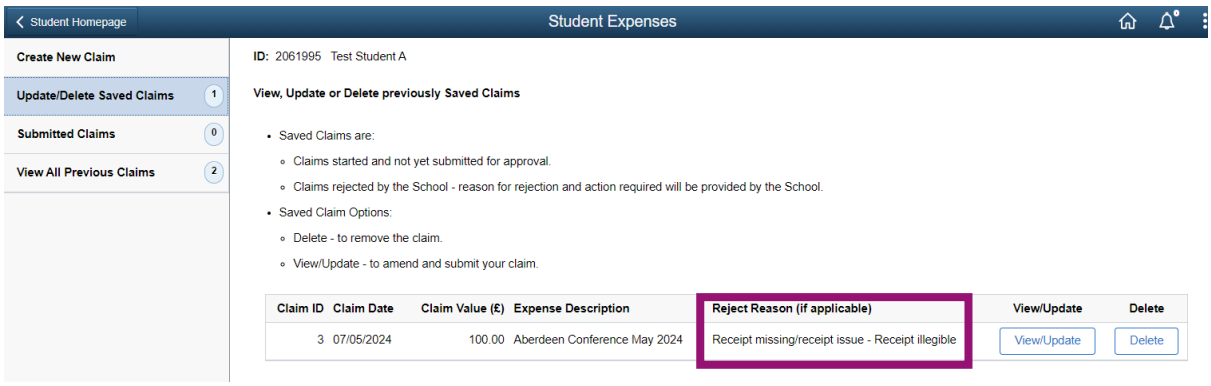
You can then submit the claim which will then be routed to the relevant approver in your School for review.



You should also get a confirmation email to your University email address confirming successful submission of the claim.

Update/Delete Saved Claims Section

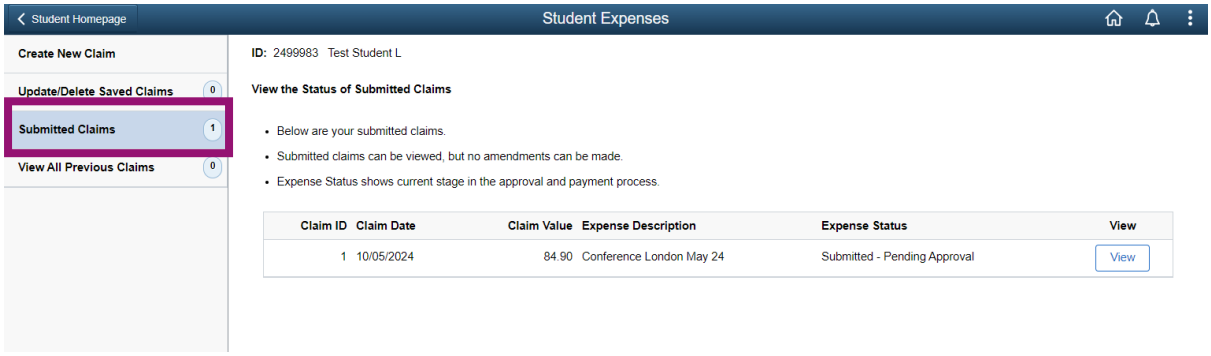
This section will show any claims that have been started/saved, but not yet submitted for review. Any claims that have been reviewed by staff and rejected back to you for correction and re-submission will also show in this section (you will see the reasons the claim has been rejected):

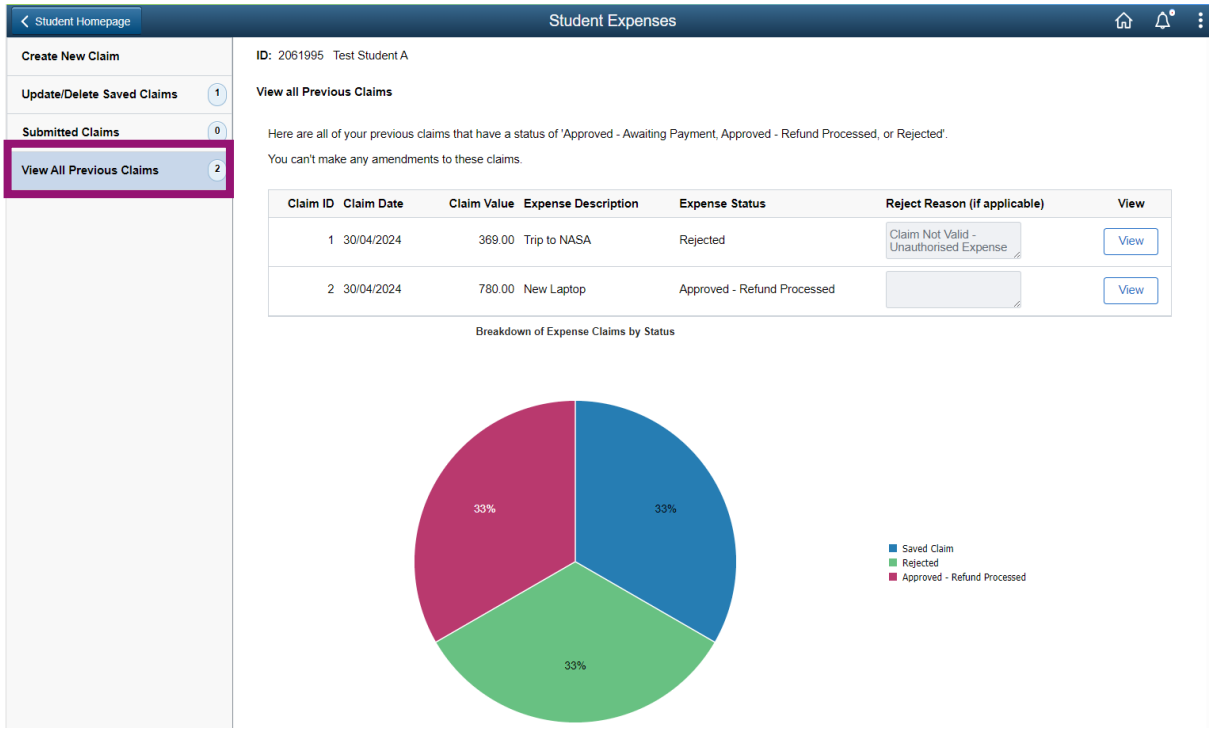


You can access previously saved claims or rejected claims for re-submittion by pressing the ‘View/Update’ button. Or, if you wish to delete any claims, you can do this by pressing the ‘Delete’ button.

Submitted Claims Section

You can check on the status of your submitted claims at any time by navigating to the Submitted Claims page. You can’t edit a claim once its been submitted – you can assess a read-only version of your claim by pressing the ‘View’ button.



Viewing All Previous Claims

You can go back and check on your historical claims using the View All Previous Claims page. Claims will show here if they've been approved or rejected outright (i.e. there isn't an option to update and resubmit). You can't edit any claims in this section – you can assess a read-only version by pressing the 'View' button.