

## HOW TO CLAIM

If currently enrolled – use the University’s finance system, called T1, to create and manage your claim

If interrupted or no longer enrolled – use a [GBP or International Payment Request Form](#), not T1

## WHAT YOU CAN CLAIM

See the [University’s Expenses Policy](#) for details of what can and cannot be claimed

BUCS fixtures and events have their own claim rates – see [BUCS mileage rates](#). Select the claim type as Travel UK and enter the fixed cost allowed for that venue - DON’T claim mileage for BUCS travel claims

## BEFORE YOU START YOUR CLAIM

**Make sure your bank details are up to date** in [iExeter](#) as this is the account your claim will be paid into:

- To add a UK bank account, see [Add bank details to iExeter](#).
- To add an overseas bank account, complete the [International Bank Account Information](#) form and email it to [accountspayableenquiries@exeter.ac.uk](mailto:accountspayableenquiries@exeter.ac.uk). Include 'International Bank Details +[Student name] + [Student number]' in the email title.

**Check if you can already login to T1** with your University username and password. To set up T1 access - ask a member of staff such as your tutor / research supervisor / college admin team / BUCS coordinator to fill in a *T1 New User Access Request* form on your behalf. Access can take up 2-3 days to get set up. [Form link and instructions](#)

**Know which T1 cost code to use -**

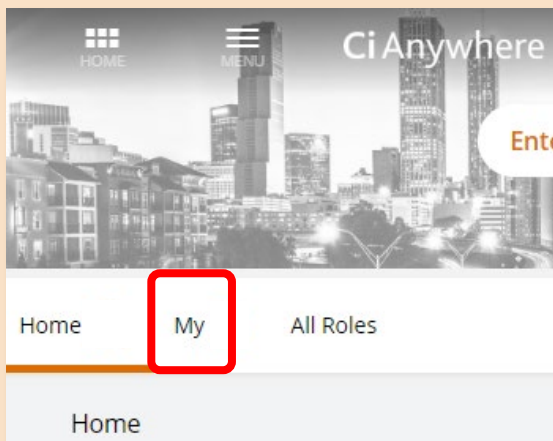
- Look up a cost code by name or owner with the [T1 Code Dashboard](#)  
e.g. search *BUCS* to see all the BUCS cost codes (each club has its own code)
- Or ask the event organiser which cost code to use

**Claim within three months** of event and always by academic year end, each 31<sup>st</sup> July

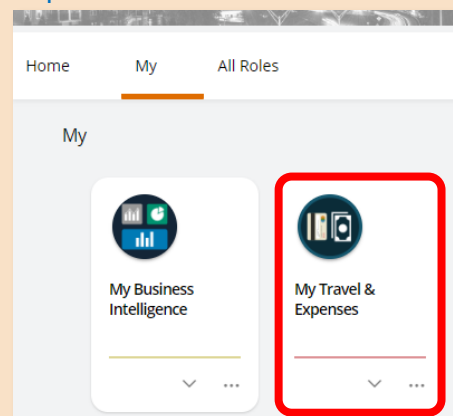
**Scan your receipts** as the images will need to be attached to the claim (NB mileage claims don’t need receipts)

## HOW TO USE T1

1) [Login to T1](#) and click the ‘My’ link:



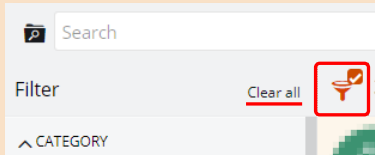
2) On the ‘My’ page, click the ‘My Travel and Expenses’ icon



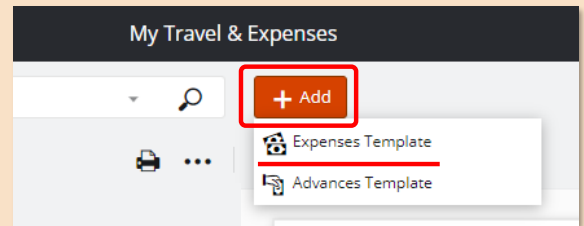
# STUDENT EXPENSE CLAIMS

3) See any previous claims by removing the filter:

- Click the filter icon, top left
- Select 'Clear all'
- Click to filter icon again to close menu



4) To create a new claim, click the 'Add' button and select 'Expenses Template'



5) Enter the date, details of the event and the cost code then 'Save' the information:

**Expenses Template**
Save this section, once completed

**Add Expense Document**  
Expenses Template

**Allowances**

**Expenses**  
None

**Add Expense Document** Cancel **Save**

**Details**

User \*  
FS058 (Freddi Smith) Check this is your login ID and name

Description \* Enter details of the event & who is claiming  
e.g. F Smith BUCS hockey match mileage to London on 30.07.22

Reason \* Will copy description from above – amend  
to include more information, if needed.

Date \* Select today's date

Expense Reason Always leave blank

**Default Dissection**

Item Code  
ENTER CHARGE CODE Enter shortened version of T1 code called Item Code  
or Charge Code – [look this up here](#).  
Use only one code per claim form – if splitting a cost  
across different codes complete separate claims for  
each portion with one code per claim.  
Two code formats in use:  
• Project item codes contain an R, G or C letter and  
look like 100028G001 or 101237R004  
• Budget Centre item codes are all numbers and  
look like 011894

Ledger Code

Ledger Name

Account Will auto-populate – do not change or delete

**Settings** Do not add or change any details in this section

Click to expand this section

6) Now click the tab for the type of expense being claimed, then 'Add' the relevant type of expense:

- Select 'Allowances' for mileage claims (except BUCS match mileage)
- Select 'Expenses' for all other types of claim e.g. accommodation, subsistence etc. Zoom out web browser to 80% if full list not shown
- For BUCS match mileage claims, select 'Expenses' > 'Travel UK'



# STUDENT EXPENSE CLAIMS

7) EXPENSES TAB: enter details about this expense and add its receipt. Then 'Save' these details:

**Travel UK Line**

**Details**

Date shown on receipt or date of event if no receipt

Save this section, once all filled in and receipt has been attached

Expense Date \*

Select type from drop-down list

Expense Item \*

YES = when using project cost code that has letter C, G or R within code e.g. 100679R001

Does the cost code have R, G or C in it? \*

NO = when using all-numbers budget centre cost code e.g. 011784

Claim Type \*

Select **EXPENSE**

Company Name

Enter vendor name on receipt e.g. SW Trains

From \*

Information boxes tailored to this type of expense e.g. Travel UK has 'From' and 'To' boxes

To \*

Narrative \*

Enter full details about this expense e.g. Return rail fare on 30/07/22 for BUCS hockey fixture against UCL

Leave blank unless using an EU research grant code - if so, send originals to EU team

Receipts relating to EU grants?

Do you have a receipt showing UK VAT no? \*

YES = your receipt clearly shows UK VAT or  
NO = your receipt does not show UK VAT

Reason for no receipt

If NO to UK VAT field above, select why no VAT receipt from drop-down

Currency Code \*

GBP (British Pounds Sterling)

Defaults to GBP - change if a different currency was used to purchase this item. Exchange rate can be amended, if needed

Total (Gross)

Cost being claimed for this expense – should match the receipt value or use 'Narrative' field to explain any discrepancy

**Additional Information**

**Attachments**

Drag new attachments here

+ Add

Do not change/delete any information in this section

Add the receipt image + any other docs supporting the claim here - .jpeg and .heic file formats cannot be used

1 ERROR  
Critical Error: Unable to get the value for AccountCode: 'NNNNNN-A-NN-NNNN-NNNN-NNNNN'. at T1.F1.Workflow.HString entityName, String methodName, String linkedItemName

But if answered the wrong way round, this **Critical Error** message will appear at the top of the screen later on when trying to submit the claim

To correct the error, select 'Edit' and change this field from **NO** to **YES** or vice versa

Repeat for every expense line in the claim

# STUDENT EXPENSE CLAIMS

8) ALLOWANCES TAB: Add details about the mileage in the form that now appears:

### Mileage Private Use Line

Cancel Save

**Details**

**Expense Date \*** Date of journey

**Does the cost code have R, G or C in it? \***

**Claim Type \*** Select EXPENSE

**Narrative \*** Give reason for undertaking journey.  
If Postcode Lookup tool's distance calculation below is manually overwritten, also enter these details e.g. "Additional 40 miles added due to motorway closure and route diversion"

**Mode of Transport \*** Select from drop-down menus – fields shown here will differ between Lease and Private Vehicle claim types

**Names of Additional Passengers**

**No of Additional Passengers** 0

**Mileage \*** Overseas mileage – enter number of miles manually, don't use Postcode Lookup tool

**From (enter using Postcode Lookup tool)**

**To (enter using Postcode Lookup tool)**

**Currency Code**  
GBP (British Pounds Sterling)

**Total (Gross)** 0.00 Mileage rates are set by HMRC and cannot be amended by UoE

**Additional Information**

This section will auto-populate - don't change or add anything here

**UK mileage -**

- Click Postcode Lookup tool to open distance calculator
- Enter postcode/first line of address in the tool's From and To fields and wait for system to return corresponding address
- Select correct address if multiple locations are returned:

Calculate Distance

**From**  
University Campus Penryn Penryn Campus Penryn Campus Co...

**To**  
EX4 4Q

Grassway House, Clydesdale Road, EXETER EX4 4QX

Clydesdale Court, University of Exeter, Clydesdale Road, EXETER EX4 4QX

- System now will calculate the distance and enter it in the **Mileage** field.
- The mileage calculation can be manually overwritten if needed
- The greyed-out 'From' and 'To' fields on the form will now update

Save this section once all filled in – no receipt needed

**YES** = when using project cost code that has letter C, G or R within code e.g. 100679R001

**NO** = when using all-numbers budget centre cost code e.g. 011784

Give reason for undertaking journey.

If Postcode Lookup tool's distance calculation below is manually overwritten, also enter these details e.g. "Additional 40 miles added due to motorway closure and route diversion"

Select from drop-down menus – fields shown here will differ between Lease and Private Vehicle claim types

Overseas mileage – enter number of miles manually, don't use Postcode Lookup tool

**UK mileage -**

- Click Postcode Lookup tool to open distance calculator
- Enter postcode/first line of address in the tool's From and To fields and wait for system to return corresponding address
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Calculate Distance

**From**  
University Campus Penryn Penryn Campus Penryn Campus Co...

**To**  
EX4 4Q

Grassway House, Clydesdale Road, EXETER EX4 4QX

Clydesdale Court, University of Exeter, Clydesdale Road, EXETER EX4 4QX

- System now will calculate the distance and enter it in the **Mileage** field.
- The mileage calculation can be manually overwritten if needed
- The greyed-out 'From' and 'To' fields on the form will now update

# STUDENT EXPENSE CLAIMS

- 9) Use the 'Add' button to include any more expenses and receipts for this same event, if needed  
Check each line's summary information and 'Edit' if any mistakes have been made  
Click 'Submit' when all expenses have been added and claim is ready to be approved

**Submit**

Enterprise search My Travel... 1 of 3

**Train fares BUCS hockey fixture at UCL** Default Travel and Expense System test

079161 | Expenses Template | Draft

**Processing Summary**

**Expenses** + Add

1 expense line.

<input type="checkbox"/>		<b>Exeter to London</b> <span>DRAFT</span>	<b>23.99</b>
		30-Nov-2021	
		Payment Method <b>TRAVEL UK</b>	Pay Employee

**Costings**

Total	23.99
Unapproved	23.99
Approved	0.00

**Do not change/delete any information in this section**

- 10) After submitting, click on the 'Approval History' tab to view your claim's progress. Your claim may need more than one type of approval. A number means your claim has gone to the pool of people who approve items for the cost code used in your claim. Click the line to see date and time details:

**Approval History**

Approval History

- Make a Request Freddi Smith
- Approve Expenses 102984A
- Notify Approve
- End Task

Could also show:

- VAT Team (if the VAT details need to be checked before approval)
- Approval pool number (group of approvers for cost code used in the claim)
- Name of staff member approving this claim

To find out who is in this approval pool – enter the pool number in the [Resource Pools](#) function

- 11) Once all approvals have been done, your claim status will change to 'Completed' and you will receive email confirmation of this.

Claims approved by end of each Tuesday are sent to UK bank accounts by BACS each Wednesday and take 2 days to arrive.

Claims to non-UK banks are sent by Western Union and take 3-7 days to arrive.

**Train fares BUCS hockey fix...** COMPLETED

079161 | 31-Aug-2021 (Single day)

**Total 23.99**

Outstanding 0.00

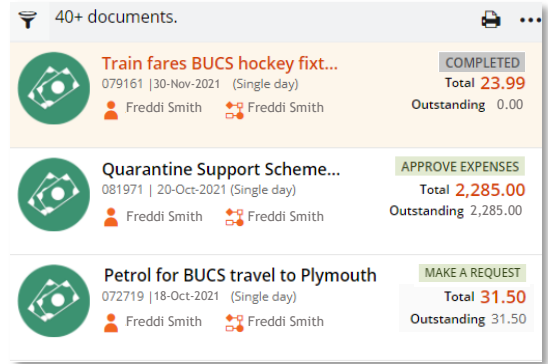
Freddi Smith Freddi Smith

# STUDENT EXPENSE CLAIMS

## CLAIM STAGES

Your claim has a number of stages it can pass through – the status updates each time it progresses to the next stage. Remove the filter (see step 3) to see all your claims and their statuses:

- DRAFT** = claim started but not yet submitted for approval
- VAT REVIEW** = claim has gone to the VAT team to be checked
- APPROVE EXPENSES** = claim has gone to the cost code approvers for final checks
- MAKE A REQUEST** = an approver has rejected your claim and returned it to you to amend
- COMPLETED** = claim has been approved and payment will be sent to your bank account shortly

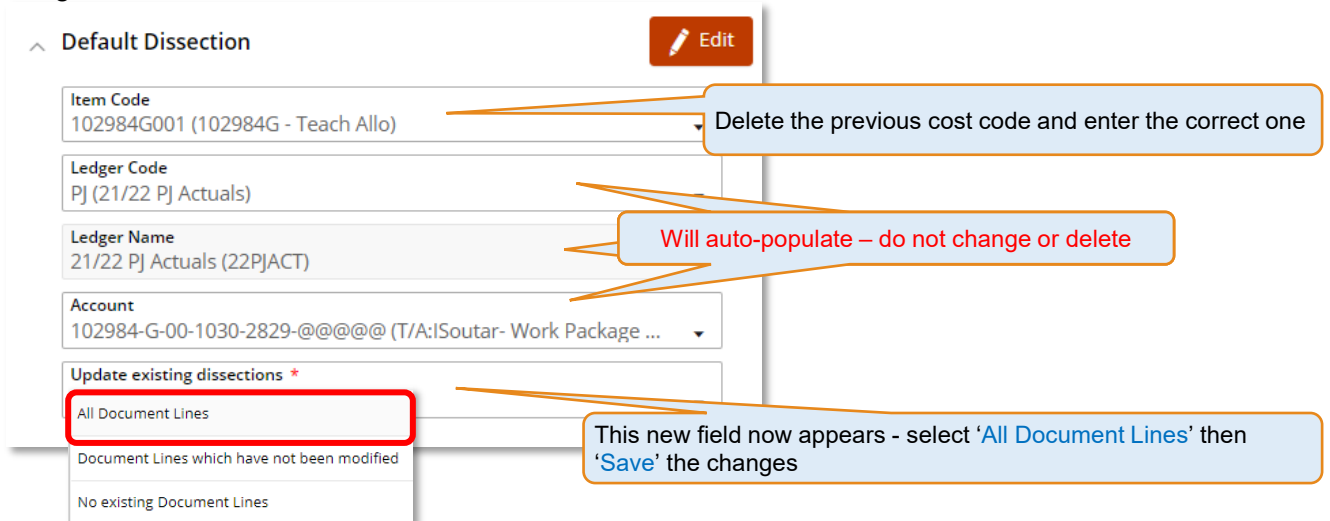


## REJECTED CLAIMS

If the approver has any queries about your claim or spots a mistake, your claim will be rejected and you will receive email confirmation of this. If this happens, your claim status will change to 'Make a Request'.

The claim is returned to you in an editable state so you can make the changes needed then 'Submit' it again for approval.

Wrong cost code? Click 'Edit' in the 'Document Details' section and scroll to the Default Dissection fields:



## HELP & SUPPORT

BUCS expenses help [aubucs@exeter.ac.uk](mailto:aubucs@exeter.ac.uk) 01392 723505 ext 3505

General expenses/T1 help [financehelpdesk@exeter.ac.uk](mailto:financehelpdesk@exeter.ac.uk) 01392 726981 ext 6981

Other T1 info <https://www.exeter.ac.uk/departments/finance/training/keytopics/studentandpgt1training/>