

Self service expense claims process

01 April 2020

Directive from Mairi Stewart, Director of HR

With effect from 1st April 2020, all salaried staff can submit expense claims through the online self service portal, which will provide the option to submit claims for approval, no matter their physical location, and this facility can be accessed through the same portal as the online payslip, link below:

<https://selfservice.st-andrews.ac.uk/dashboard/dashboard-ui/index.html#/landing>

When a claim is submitted through self service, it will route to a checker to confirm the cost centre and detail code(s) used are correct and the individual's line manager for approval; when that has been completed online, the claim will then route to Salaries for final checking and payment. To confirm, this is a 2-stage approval process, so it may be that a claim 'could' be rejected at either stage; if rejected, the claim will be re-routed back to the claimant, to allow the claim to be edited and resubmitted, as appropriate, when it will then go back through both approval stages prior to being confirmed for payment.

Some key points to note:

- The claim form allows for descriptive text, both at the claim form level as well as on individual claim lines – this should be completed as comprehensively as possible, for FAS Audit and HMRC purposes, as well as to ensure there is no rejection of the claim based on University Expenses Policy rules
- Receipts, where applicable to justify an expense item being claimed, should be uploaded to the relevant line of the claim; filenames for receipts should not contain any non-alphanumeric characters, so avoid the use of symbols such as '-' or '&', for example
- Original receipts should be retained until the expense payment has been processed, and payment has been received through your bank account
- Claims can be built up over a period of time, as claimants have the option to 'Save for later'; a saved claim can be accessed via Expenses > History in the left hand banner on the self service dashboard - click on the description of the claim to re-open and continue to add claim lines
- If an existing claim line needs to be edited, there is an Edit (pencil) icon on each line within the claim, which allows the claimant to change values, or cost centres, for example
- It is critical that cost centres are entered correctly as a full 16-digit code, with no dashes, so for example ABSX0000006028, where the detail code is reflected by the final 4 digits of the full cost centre code; a summary of the common codes will be made available online, but as a general guide, the detail code is typically the same 4 digits as shown against the claim type which has been selected for that claim line, for example 'Car Hire (6028)'
- When a claim has been completed, with all relevant details, descriptions and uploaded receipts, the user can then select the option to 'Submit'; when done, the user will receive a confirmation message that the claim has been submitted and the claim will route to the direct line manager for approval, unless the self service team have been advised of any alternative arrangements to be setup for this within the School; approvers will be notified that there is a claim awaiting their review via email
- Online approvals within the school should continue to be processed in line with the published Salaries cut-off dates to be considered for payment in that payroll month
- The user will receive an email confirmation at each of the 2 approval stages, but can also check the progress of an individual claim through the Expenses > History option, where by clicking on the down arrow alongside the claim, and Authorisation Progress image will be

visible, and by clicking on the stage the claim is now pending at, the user can see 'who' has the claim for review/approval

- Full user guidance notes are available online through self service, but further support queries can be directed to Karen Ross (kr16@st-andrews.ac.uk) or Dianna Murray (dhb@st-andrews.ac.uk) or directly to hrselfservice@st-andrews.ac.uk, which will be resourced Mon-Fri during normal business hours