FAQs – Digital Student Expenses

FAQs have been split into four areas:

- Student access to iExpenses
- Project Code Access
- Policy and approval
- Using iExpenses for Student Claims

Student Access to iExpenses

Which students can use iExpenses?
All UCL registered students with a valid UPI and UK bank account can be given access to claim via iExpenses. All students must have UCL log in credentials. Please see user guide here.

Will all students now have access to iExpenses?
Not automatically. Access will be granted as required on a case by case basis, and this will be managed by the relevant UCL department. Please see user guide here which explains how to give a student access to iExpenses.

Will students with foreign bank accounts be able to submit claims via iExpenses?
Not yet. Only students with UK bank details can submit claims via iExpenses at present. We are investigating whether payments to non-UK accounts can be accommodated in future, but in the meantime, if a student only has a non-UK account, they will need to use the general manual expense form for foreign bank accounts and submit to apexpenses@ucl.ac.uk.

How does a student access iExpenses?
Please see user guide here. An administrator in your department will need to give the student(s) access prior to use.

How long will access to the system be granted for?
Access will be granted until either the student leaves UCL or the department remove access privileges. See question below on how to remove access.

How can I remove access privileges to iExpenses from a student?
Using the User Management responsibility in MyFinance, departments can end date the Internet Expenses and UCL Student Expenses responsibilities for the relevant student. Guidance can be found here.

Do I need to go through the student set-up process for each claim?
No. Once the student is given access, they can submit claims until either their access expires, as they have left UCL, or the department remove their access privileges.

Can I access iExpenses remotely?

Yes you can access iExpenses remotely. Please ensure you are using UCL VPN or Desktop@UCL Anywhere. Internet Explorer is the recommended browser to access MyFinance and iExpenses. If you have trouble accessing MyFinance, please contact myfinancehelp@ucl.ac.uk

Is there a recommended browser to use for iExpenses?

Yes, the recommended browser is Internet Explorer.

For those who are set-up, what will access allow students to do in the system?

Students will only be able to access iExpenses and the UCL Student Expenses responsibility used to set up their UK bank details. No other MyFinance responsibilities will be available to students using this process.

How are payee bank details set up?

Please see user guide here. Each student will need to set up their UK bank details prior to submitting their first claim. If the student does not have UK bank details, they should use the general manual expense form for foreign bank accounts and submit to apexpenses@ucl.ac.uk.

Can I submit a claim on a student's behalf?

Yes, please see user guide here. A department can choose to be a delegate for a student and submit a claim(s) on their behalf. This may be appropriate if the department wish to award the student with a bursary/prize. However, in order for the claim to be raised the student will first have to set up their UK bank details. Following the claim being submitted, the student will be required to accept the claim raised on their behalf using the email notification sent to them.

How can I become a delegate for a student after they have already been given access?

Please see user guide here. The same request adding a delegate can be submitted after the student has already been given access.

Will this functionality be available to external visitors?

Not at this time. The Finance Transformer is working on a separate project to enable visitors to make online claims. More information on this initiative will be shared in due course. In the meantime, during this period of remote working, please email scanned copies of visitor expense claim forms and receipts to apexpenses@ucl.ac.uk.

Is there a cut-off date for submitting manual student claim forms that are already in progress?

Yes. Please submit any manual student claim forms to Accounts Payable by 27th August. After this date, Accounts Payable will only accept manual student claim forms relating to foreign bank accounts.

Project Code Access

What project code(s) will students have access to?

The only project code(s) the student(s) will have access to, are the ones they have been given permission to use by the department. Please see user guide here which explains how to give a student access to a project(s).

Will the system help to code the claim?

Students will only be able to see codes they have been given permission to use. The user guide also explains how to code the claim, which can be found here.

How can I add an additional project code for a student to use after they have already been given access?

This can be done in two ways. Firstly, the department who have access to the key member form can add projects to the students in the same way they currently do for staff. Alternatively, the same request originally used to give the student access can be run again with the additional code(s). Please see how to submit this request in the user guide here.

How can I remove access to a project code(s) from a student?

Permissions to a project code(s) can be removed by the department using the key member form in the same way as they currently do for staff. Guidance can be found here

Policy and Approval

Where can I find the UCL Expenses Policy?

The UCL Expenses Policy can be found here

Will there be a new expenses policy for students?

No, the existing UCL Expenses Policy already covers students.

Who will approve my claim?

The iExpenses approval hierarchy will route your claim to the departmental financial signatory who has requisite monetary limit and responsibility for the project code charged on the claim. This is the same hierarchy used for staff expenses.

How will my claim be approved?

When the claim has been submitted, an email notification will be sent to the departmental financial signatory who has requisite monetary limit and responsibility for the project code charged on the claim. They can approve the claim online using the email notification.

How can I view the receipts when approving a claim?

Please see Approving Expense Claims Guide. Receipt images are attached to the email notification or MyFinance worklist notification, where applicable, i.e. mileage claims do not require receipts.

What should I be considering prior to approving a claim?

Approvers are expected to review claims and consider the following before approving (which are no different to the checks carried out previously using the manual form):

- The appropriateness and cost of the expenditure
- The expenses category chosen for each item
- The project code(s) charged
- Any policy violations

- That receipts or receipt images correspond to the claim and constitute itemised receipts, not credit card slips/bank statements.
- That items within the claim meet the terms of the research funder's terms and conditions (if related to sponsored research).

Using iExpenses for Student Claims

Is there a user guide for iExpenses?
Please see guidance here. You can find further guidance on specific areas of iExpenses at MyFinance help (please ensure you are connected to UCL VPN or Desktop@UCL Anywhere to access this area).

How are payee bank details set up?
Please see user guide here. Each student will need to set up their UK bank details prior to submitting their first claim. If the student does not have UK bank details, they should use the general manual expense form for foreign bank accounts and submit to apexpenses@ucl.ac.uk.

Will I be able to see claims before they're submitted?
Yes, all claims can be viewed by the student prior to submission on the iExpenses homepage.

Will I be able to view the status of my claim?
Yes, the status of your claim can be viewed on the iExpenses homepage.

Will I be able to view the status of a student's claim in my department?
If you have the iExpenses Helpdesk responsibility you can view all claims submitted in your department. If you do not have this responsibility, you can request access by contacting your departmental administrator.

Can I continue to issue student bursaries/stipends through this process?
Yes, a new category has been added to iExpenses, called Student Bursary/Prize/Stipend. This can be used to pay a stipend for a student to a UK bank account only.   We are investigating whether foreign bank stipends can be accommodated in future, but in the meantime if the stipend is to be paid to a foreign bank account, please use the foreign bank student bursary form and send to apexpenses@ucl.ac.uk.

If the stipend claim is raised by the department as a delegate, in order for the claim to be raised the student will first have to set up their UK bank details using the process set out in the user guide here. Following the claim being submitted, the student will be required to accept the claim raised on their behalf using the email notification sent to them.

What is the quickest way of creating receipt image files?
There are two main ways to create receipt images:

- Scan your receipt(s) using a scanner or a scanning mobile app (i.e. iScanner, Genius Scan) and create a PDF file which can be emailed to your UCL email address to save to your desktop.
- Take photos of your receipt(s) on your mobile phone and sync to OneDrive for Business on your desktop. Please see guide at Creating Receipt Images - OneDrive for Business Guide

Additionally, electronic receipts, i.e. emails and/or their attachments, can be saved to your desktop to attach to claims. Please keep the number of files attached to a single claim to a minimum. This reduces the storage size and makes it much easier for the approver to view the receipt images, and therefore authorise the claim.

I have several receipts for one claim, what is the best way to attach these receipt images?

Please see guide at Creating Receipt Images - OneDrive for Business Guide. Where possible, please scan or photograph several receipts in one file or amalgamate several files into one PDF. As far as possible, please limit file sizes to 5MB per attachment and 10MB overall for a single claim. There is a system file size limit of 7.5MB per attachment and overall limit of 15MB per claim, however, to reduce storage, please keep file sizes to a minimum.

Do I have to store the original receipts?

Original paper receipts do not need to be stored locally, unless they relate to sponsored research and it is explicit in the terms of the grant that original paper receipts need to be retained.

What is an acceptable receipt image?

Please ensure all receipt images are legible and meet the policy criteria, see 3.6 at UCL Expenses Policy where it states:

Credit card slips or credit card/bank statements will not be accepted as evidence of business expenditure. All receipts used should include details of what goods or services have been purchased.

Is there a file size limit for attachments to claims?

As far as possible, please limit file sizes to 5MB per attachment and 10MB overall for a single claim. There is a system file size limit of 7.5MB per attachment and overall limit of 15MB per claim, however, to reduce storage, please keep file sizes to a minimum. Please see Creating Receipt Images - OneDrive for Business Guide for how to reduce file size by amalgamating several files into one PDF file.

Will my approver be able to view the receipt images?

Yes, approvers will be able to view the receipt images from either the email notification or their notification list in MyFinance.

Will my claim be checked by Accounts Payable?

Please ensure your claim is compliant with the UCL Expenses Policy prior to submission. Some claims are checked by Accounts Payable and they can view these electronically, they will fall into the following categories:

- Policy violations
- Random selection – a proportion of claims are selected automatically by system workflow for checking in Accounts Payable

Do I need to submit receipt images for mileage claims?

Mileage can be claimed without receipt images. Please see process at Entering a Mileage Expense Claim

Who can I contact if I am having trouble with my claim?

Please contact the Expenses Team at apexpenses@ucl.ac.uk or your department finance team if you need advice on how to complete your claim. If you have issues accessing MyFinance and iExpenses, please contact myfinancehelp@ucl.ac.uk.