



## **Digital Visitor Expenses**

### **External Visitor Guidance**

## Introduction

From September 2023, UCL Finance are launching functionality which enables external visitors to follow a fully paperless process for the submission of expense claims. UCL departments will use this new process to replace the previous manual process and provide a substantially improved experience for all involved.

The main features of the new solution are that it:

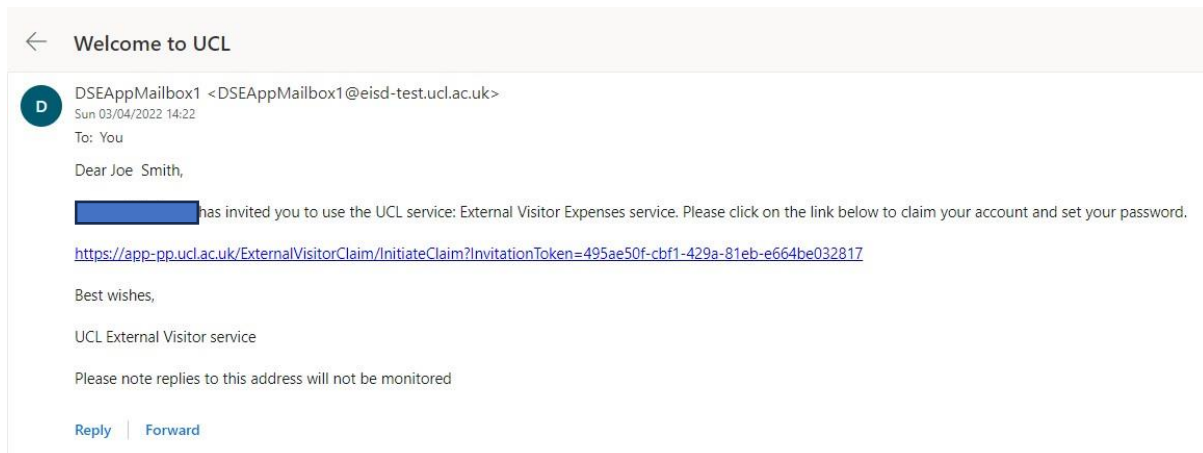
- Replicates previous manual steps on a digital platform, enabling a paperless end-to-end process.
- Enables submission directly by the visitor
- Remains department led, ensuring that visitors are fully supported through the process and that access is granted / set-up required on an as needed basis only.
- Claims can be tracked on system

The digital process uses a newly developed portal which enables the UCL department to invite a visitor to use the service, then allows the claimant to register with their bank details and submit an expense claim.

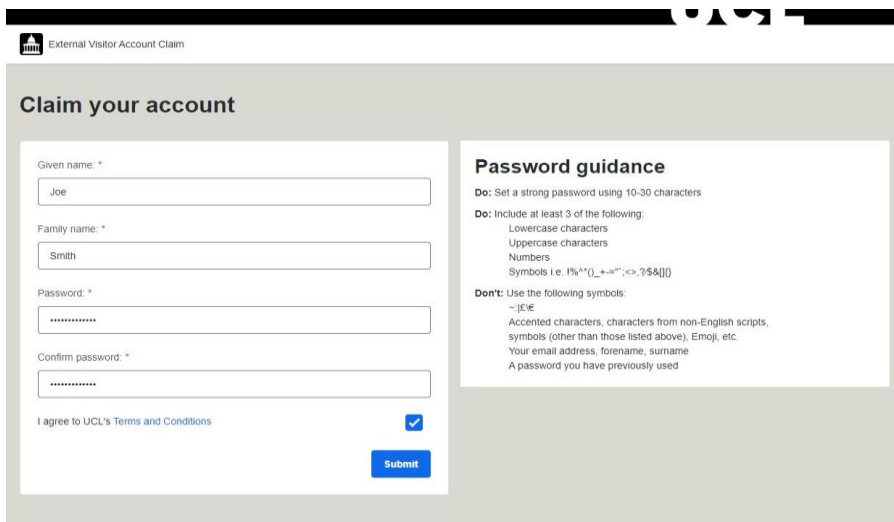
This guide explains the step by step process for: registering with the visitor expenses service, entering bank details and making a claim. A separate guidance document has been created to explain the process for the UCL department administering a claim.

## Receiving invitation from UCL and activating account

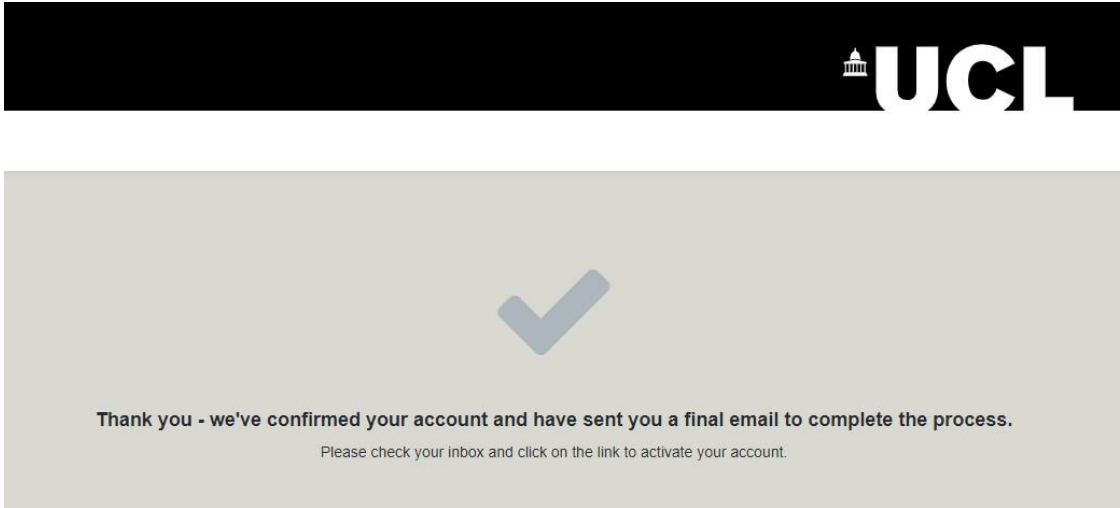
1. When a UCL department invites a visitor to use the expenses service, the visitor will receive an email with a link to register. Click link:



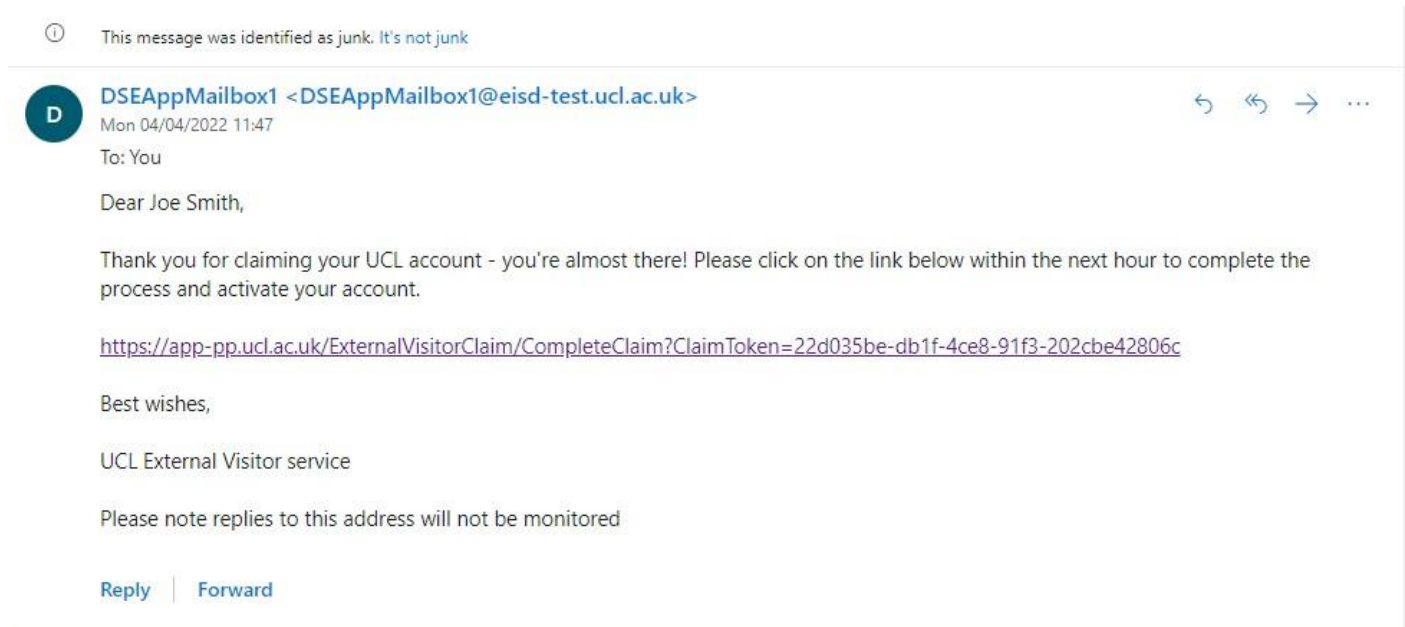
2. Screen below appears, enter password, agree to Ts&Cs and click **Submit**:

A screenshot of a web form titled "External Visitor Account Claim" and "Claim your account". The form has four input fields: "Given name: \*" with "Joe" entered, "Family name: \*" with "Smith" entered, "Password: \*" with masked characters, and "Confirm password: \*" with masked characters. Below the fields is a checkbox "I agree to UCL's Terms and Conditions" which is checked. A blue "Submit" button is at the bottom right. To the right of the form is a "Password guidance" box. It states: "Do: Set a strong password using 10-30 characters. Do: Include at least 3 of the following: Lowercase characters, Uppercase characters, Numbers, Symbols (e.g. !%\*()\_+~@":;<>?&[]). Don't: Use the following symbols: ~!@# \$%^&\*()\_+~@":;<>?&[] Accented characters, characters from non-English scripts, symbols (other than those listed above), Emoji, etc. Your email address, forename, surname. A password you have previously used".

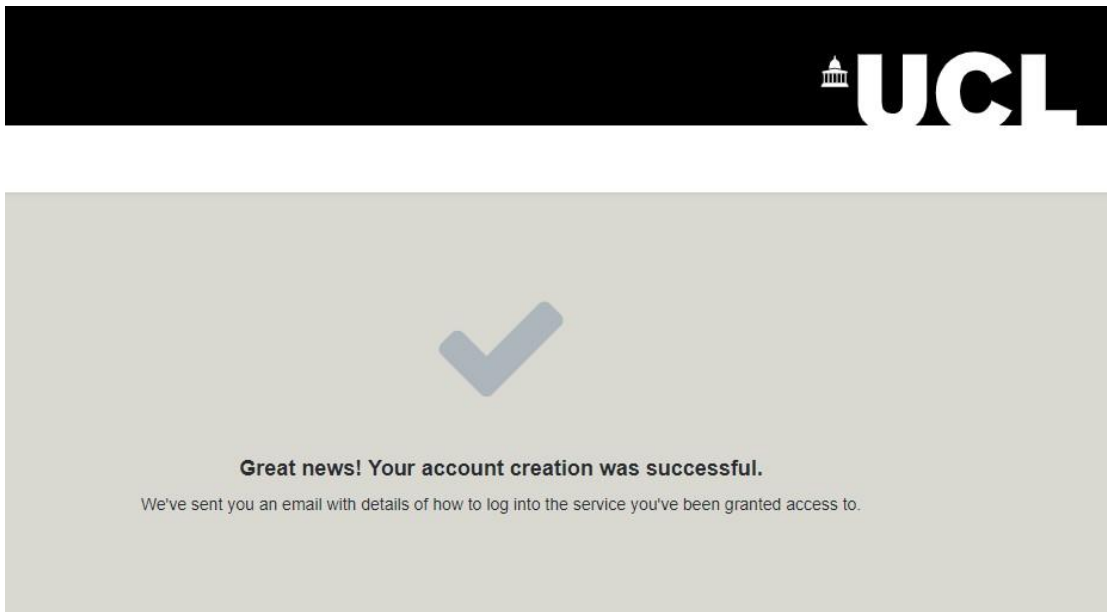
3. The message below will appear when submitted:



4. Go to email inbox. The email below will appear. Click on the link to activate the account:

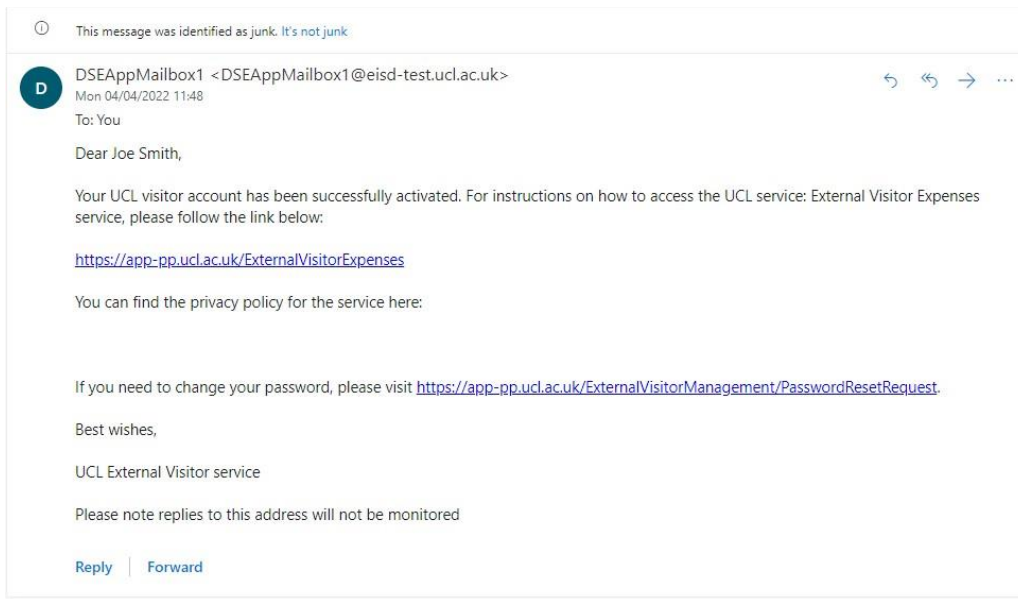


5. When activated the message below will appear:

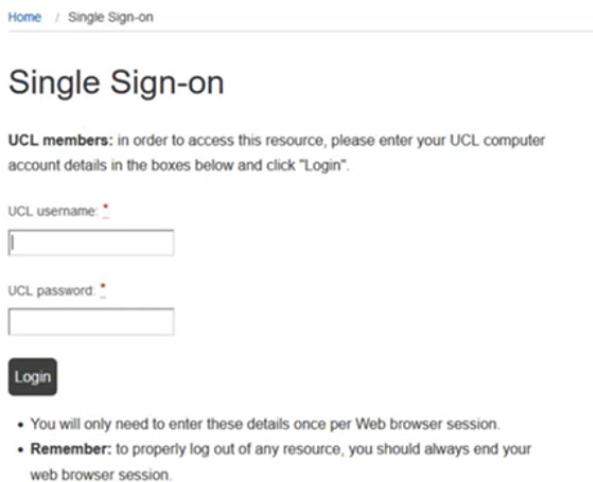


## Registering bank details and making a claim

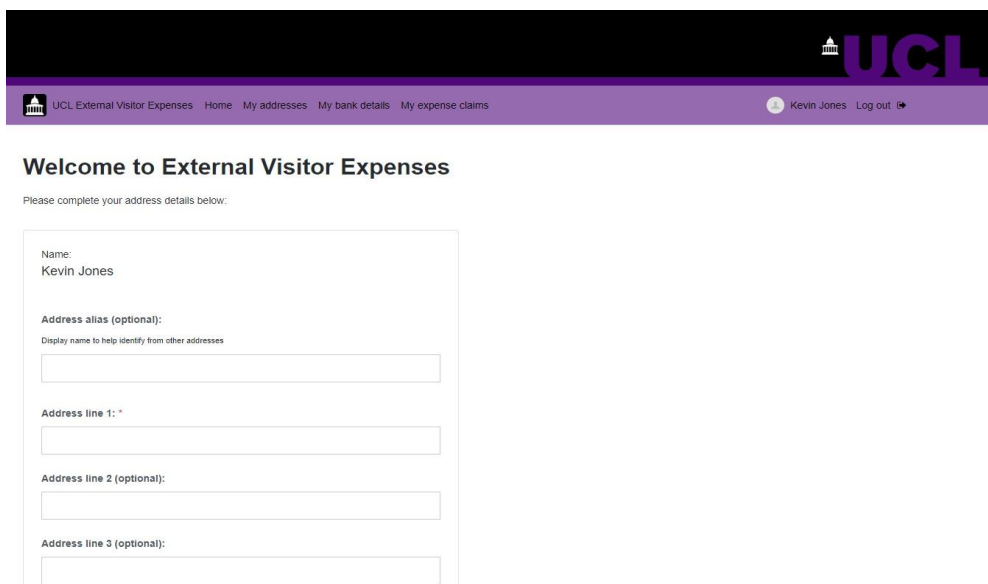
- When account is activated, an email is sent to the visitor email address. Click on link to access the External Visitor Service:



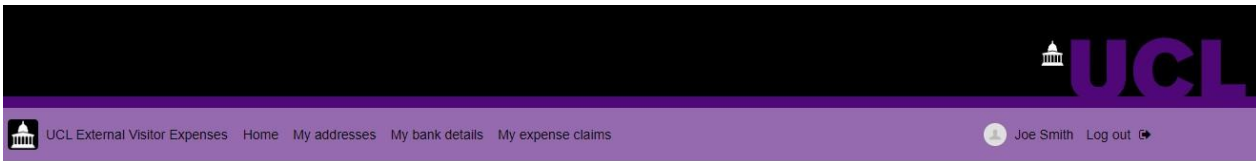
- Log into the service using the email address and password used during the account activation process:



- Complete address fields and click **Next**:



9. Enter bank account and click **Save**. **Please double check the bank details before saving to ensure correct and if an overseas bank account, ensure that BIC/SWIFT, IBAN codes etc are in the correct format:**



## Register bank account

Account alias (optional):  
Display name to help identify from other accounts

Country: \*  
United Kingdom

Account holder's name: \*

10. The expense claim area will appear. Enter the claim description, i.e. 'travel to interview', then tick the declaration and click **Save**:

① Note that if you work with multiple departments, you need to make sure you select the correct UCL Contact for each claim from your list.



## View expense claim

### Claim summary

Please enter the reason for your claim in the description box below

Claim description: *	Address: *	UCL contact:
<input type="text"/>	6	<input type="text"/>
	Bank account: *	Payment currency: *
	<input type="text"/>	GBP - £ - Pound Sterling

I confirm that this expenditure has been incurred as a result of UCL activities only, and that the bank details given are correct and can be used by UCL to pay this claim.

11. The Edit expense claim area will appear. Upload a receipt file, only one file can be uploaded with all the receipt images in one file. Therefore, if you have multiple receipts/files, please take a photo of all the receipts and upload, or combine files into one PDF – maximum size 3.9MB. Guides on how to do this are available on the internet:

## Edit expense claim

### Claim summary

### Receipts

Please combine your receipts into one JPG or PDF file. See our guide on how to create a single PDF from multiple files.

**Upload receipt**

### Claim items

Add a claim item for each individual receipt. Do not combine receipts into a single claim item.

**Add claim item**

Date	Type	Justification	Amount
You have not added any items yet.			

**Total: £0.00**

## Edit expense claim

### Claim summary

### Receipts

Please combine your receipts into one JPG or PDF file (max size limit 7.5MB). See our guide on how to create a single PDF from multiple files.

RECEIPT FOR TESTING

**Delete receipt** **Change receipt**

12. Enter the claim lines by clicking **Add claim item**. Please add one claim line per receipt:

### Claim items

Add a claim item for each individual receipt. Do not combine receipts into a single claim item.

**Add claim item**

Date	Type	Justification	Amount
You have not added any items yet.			
<b>Total: £0.00</b>			

13. Enter new claim item details, click **Save**:

UCL External Visitor Expenses Home My addresses My bank details My expense claims Joe Smith Log out

### New claim item

Expense type: \*  
Airfare - Europe

Date: \*  
dd/mm/yyyy

**Back** **Save**

14. When all claim receipt items have been added, click **Send claim for approval**:

### Claim items

Add a claim item for each individual receipt. Do not combine receipts into a single claim item.

**Add claim item**

Date	Type	Justification	Amount	
01 Mar 2022	Airfare - Europe	Travel to UCL	€248.00 (£205.84)	<b>Edit</b> <b>Delete</b>

1 to 1 of 1 items

**Total: £205.84**

**Send claim for approval**

Process now goes back to UCL to accept and process the claim.