

## FAQs - Digital Staff Expenses

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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.

### Can I still submit my claim with paper receipts and without receipt images?

From 27 March 2020, all claims must follow the new paperless process. The new functionality significantly reduces the administration attached to 45,000 expense claims a year and ensures faster reimbursement. However, if your claim was created and submitted prior to 27 March 2020, your claim will be processed using the previous paper process.

### 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.

### Will my research funder find receipt images acceptable?

Generally, yes. This has been checked with Research Services. Original paper receipts do not need to be stored locally, unless it is explicit in the terms of the grant that original paper receipts need to be retained. Please check the terms of the grant carefully.

### 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 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

### Will this functionality be available to students?

Not yet, although some PhD students are also employees and already have access to iExpenses. If they currently have access to iExpenses, they will be able to access this new functionality and submit claims using receipt images.

The Finance Transformer is working towards giving all types of students access to iExpenses in the future. We hope for this functionality to be available later this year; further communications will be shared when this ready to launch.

In the meantime, during the remote period of working due to the coronavirus (Covid-19), please email scanned copies of student expense claim forms and receipts to [apexpenses@ucl.ac.uk](mailto:apexpenses@ucl.ac.uk).

### Will this functionality be available to external visitors?

Not at this time. The Finance Transformer is working on a project to enable visitors to make online claims. More information on this initiative will be shared in due course.

In the meantime, during the remote period of working due to the coronavirus (Covid-19), please email scanned copies of visitor expense claim forms and receipts to [apexpenses@ucl.ac.uk](mailto:apexpenses@ucl.ac.uk).

### 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](mailto:apexpenses@ucl.ac.uk)

### 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:

- 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).