

# Oxford RTSG/Student Led Event Expense Claim Process

## Overview

RTSG expenses are reimbursed via the University eExpenses system Sap Concur, which is governed by the University Finance Division and is subject to University finance regulations. The University Financial Regulations govern the expenses process, and ensure all claims are legitimate and fully evidenced. Each individual claim must have all required evidence and full details provided in order to be approved and stand up to independent audit scrutiny at a later date.

This document details specific guidance for students. The full university expenses claim process can be accessed at <https://finance.web.ox.ac.uk/expenses>. Generic training on SAP Concur and 'how to' videos are also available at [eExpenses training and support | Finance Division \(ox.ac.uk\)](#).

The reimbursement process generally takes 2-3 weeks where all the required steps have been followed. It is important to note that failing to follow the instructions provided might delay the delivery of expenses, so please read through the following instructions carefully as you compile a claim.

## Key points

- You should make separate claims for expenses incurred under separate pre-approved RTSG Grants. Reimbursement will be based on pre-approved costs. Therefore, if there are any changes to your expenses, please contact the DTP Office as soon as possible to enquire whether these can be approved.
- You must submit your claim no later than **three months** after the expense has been incurred. In exceptional circumstances, approval may be given for a slightly later claim, however the University Finance Office will not permit reimbursement of expenses older than 12 months under any circumstances.
- You can only claim your expenses after you have completed the funded activity e.g. after attending a conference or completing a training course (not just after making the payment). Proof of attendance is required.
- You must submit copies of the original, fully itemised receipts evidencing what the cost incurred relates to, for all approved expenses: bank statements, credit card slips, and invoices do not qualify as receipts on their own. In order to provide the Finance Office with all the information they require, please attach you booking confirmation alongside the receipt, where possible.
- It is your responsibility to collect and keep receipts safe. If you lose any receipts, please be advised that the Finance Office is unlikely to be able to approve reimbursement, except in exceptional circumstances.
- Please utilise the "Comments" box for each line of the claim to provide as much detail as possible to the Finance Office regarding the expenditure. For example, "Train ticket to travel to attend "X" conference in *"insert place name"*". Providing full details will help to avoid delays in your reimbursement.

- If a name is detailed on a receipt, this must be the claimant’s name. If not, please contact the DTP office before submitting your request. The University can only reimburse costs to individuals who incur them and who are University students/staff.
- If you are submitting a claim for interview expenses, you will need to list the names interviewees accompanied by the date of the interview. If the interviewees need to remain anonymous, please fill in the comments box as follows: “Research Participant #X (name withheld; anonymity required to enable research participation)”.
- If you are claiming expenses for a conference/training course/other event you will need to include proof of attendance/completion, alongside your claim materials. This is necessary even if you only used RTSG funds to cover transport to the event.
- To submit a claim for mileage in a private vehicle, you will need to first upload the following three documents on your profile on SAP Concur: proof of a valid driving licence, proof that the vehicle is safe, legal and roadworthy (i.e. a current MOT certificate), and proof the vehicle is insured for business use. These documents will also need to be sent separately to the DTP by emailing [granduniondtp@socsci.ox.ac.uk](mailto:granduniondtp@socsci.ox.ac.uk). We will keep them on file for future claims.
- You cannot claim mileage for hire vehicles. For hire vehicles, only the cost of hiring the vehicle for the specific days required for undertaking University business can be covered. You must also confirm that the vehicle is insured for business use at the point of hiring.

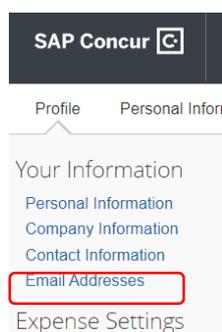
## How to create and submit a claim in SAP Concur (eExpenses)

### Accessing the system

- Navigate to the Expenses page on the Finance Division website <https://finance.admin.ox.ac.uk/expenses>.
- Click on the **Log in to SAP Concur eExpenses** button on the right-hand side column. This will take you to the SAP Concur homepage.
- Log in using your University SSO (single sign-on) credentials (e.g. abcd1234@OX.AC.UK).

### Set up your profile (when you log in for the first time)

From the homepage on the top right corner, click on 1. **Your Initials** and then 2. **Profile settings**.



**Email address** – to the left of the page, under “Your Information”, click on the **Email Addresses** link. This opens the “My Profile - Personal Information” page. Your University email address should already be prepopulated at the bottom of this page. To verify it: 1. click **Verify** (additional email addresses can be added - these will also need to be verified). You should then receive an email from SAP Concur which will contain a verification code. 2. Copy and paste the code into the “Enter Code” field. 3. Click **OK**. The status of your email address should change to “Verified”.

**Email Addresses** Go to top

Please add at least one email address.

[How do I add an email address?](#)  
[How do I verify my email address?](#)  
[Why should I verify my email address?](#)  
[Travel Arrangers / Delegates](#)

+ Add an email address

Email Address	Verify	Contact?	Actions
Email 1 marius.apetrei@sbs.ox.ac.uk	Not Verified <b>1</b> <input type="button" value="Verify"/>	Yes	

▲ Go to top

+ Add an email address

Email Address	Verify	Contact?	Actions
Email 1 marius.apetrei@sbs.ox.ac.uk	Check email for code Enter Code <b>2</b> <input type="text"/> <input type="button" value="OK"/> <b>3</b>	Resend   Cancel Yes	

**Bank Information** – to the left of the page in the “My Profile - Personal Information” section, under “Expense Settings”, click on the **Bank Information**. In the “Bank Information” section, populate the following fields: Bank Country/Region, Sort Code and Account Number, Bank Name and Branch Location, Full Legal Name of Account Owner, and your address must be entered for correspondence purposes. Click **Save and Authorise**.

Note: SAP Concur only supports payments made to UK bank accounts.

### Bank Information

Bank Country/Region: UNITED KINGDOM | Bank Currency: UK, Pound Sterling

Sort Code: 123456 | Account Number: 12345678

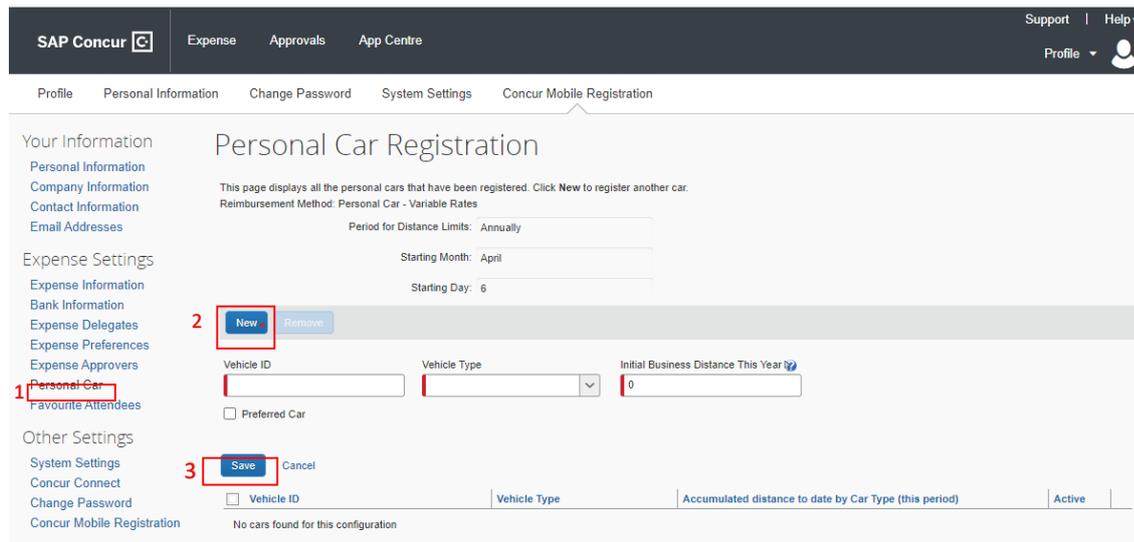
Bank Name: The Bank | Branch Location: Oxford | Status: Confirmed

Active: Yes

Full Legal Name of Account Owner: **Marius Apetrei** | Building Number and Road: 1 High Street | Building Name:

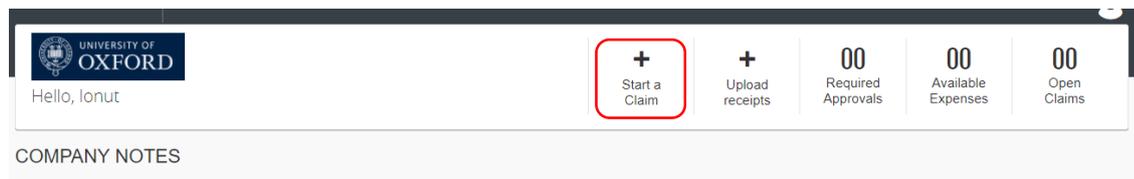
Town: Oxford | Locality:  | Postal Code: OX1 1AA

**Personal Vehicles** – if mileage costs have been pre-approved, you will need to register the relevant vehicle. Click on 1. **Personal Car**. Click on 2. **New**. You will need your vehicle registration number to put in as the vehicle ID. Choose the correct vehicle type from the drop-down box. The “Initial Business Distance This Year” box must be completed if you have already claimed mileage costs through other means for this reporting period which started on 6<sup>th</sup> April, otherwise leave as zero. 3. **Save**. Please remember you must also send a copy of the information to the DTP so we can keep this on record at [granduniondtp@socsci.ox.ac.uk](mailto:granduniondtp@socsci.ox.ac.uk)

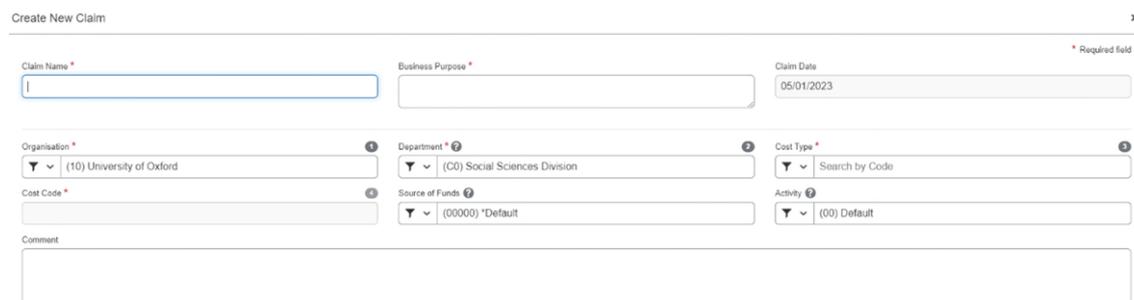


## Creating a claim

From the **SAP Concur** home page click on the **Start a Claim** button.



This launches a pop-up, "Create a New Claim".



The mandatory fields you need to fill in are marked in red:

- **Claim Name:** this should be something that makes the claim easy to identify (e.g. "RTSG Grant 1 XXX Conference Mar 2022").
- **Business Purpose:** brief narrative describing the type of expenses included in the claim (e.g. "Travel, accommodation & conference fee - RTSG Mar 2022").
- **Claim Date:** the date on which you submit the expense claim (should be pre-populated).
- **Comment:** allows you to add more details. Please use this as required to give the Finance Office as much detail as possible.
- **Organisation:** defaults to "(10) University of Oxford".
- **Department:** The default should be "(C0) Social Sciences Division" but if not please amend by clicking on drop-down box and typing C0 (zero not "O"). "(C0) Social Sciences Division" should then appear. Select.
- **Cost Type:** select "(PJ) Project"

Create New Claim x

Claim Name \* RTSG Grant 1 Conference December

Business Purpose \* Travel, accommodation & conference fee - RTSG December 2022

Claim Date \* Required field 05/01/2023

Organisation \* (10) University of Oxford

Department \* (C0) Social Sciences Division

Cost Type \* (PJ) Project

Cost Code \* (COT00020\_C000.06) ESRC Grand Union DTP\_RTSG Exp.

Source of Funds (00000) \*Default

Activity (00) Default

Comment  
For tickets, hotel accommodation, and the conference registration fees for the Conference on Completing Expense Claims 2024 in Oxford.

- **Cost code:** Select “Code”, as illustrated below, before searching:

Type to search by:

Text  Code

- If your funding started prior to October 2024, select from the drop-down list ‘(COT00020\_C000.06) ESRC Grand Union DTP\_RTSG Exp’.
- If your funding started after October 2024, select from the drop-down list ‘(COT00180\_C001.02) ESRC Grand Union DTP\_RTSG Exp’.
- **Source of funds:** leave as is, i.e. “(00000) \*Default”
- **Activity:** leave as is, i.e. “(00) Default”.

At the bottom of the screen click the “**Create Claim**” button.

## Enter expenses

The left side of the screen displays a list of each expense which, when creating a new claim, will be empty. Each expense you enter and save to the claim will then appear in the list.

To add the first expense item, select the most appropriate expense type from the list, e.g. Travel – air fare. You can search through the list by typing a relevant word. The expense type you choose will determine which fields you then need to fill in. The mandatory ones will be marked in red. Items below the blue line should default in from the previous page and don’t need to be updated.

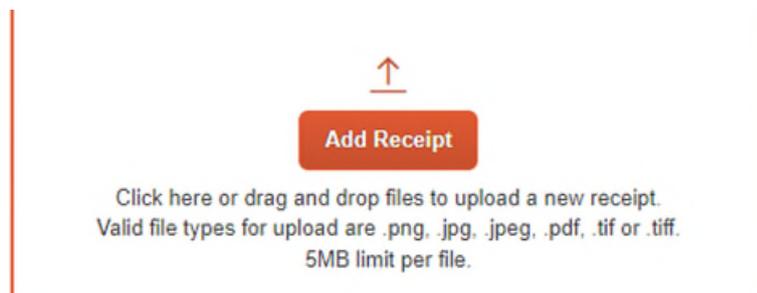
**Notes:** For expense types with ‘staff’ and ‘non-staff’ options, please select ‘non-staff’. For Participant costs, enter as ‘gifts’.

- **Cost Type:** “Project”.
- **Transaction Date:** the date on which the cost was incurred i.e. paid for (this will determine currency exchange rate)
- **Supplier Name:** This is mandatory for some expense types. Enter the name of the supplier as it appears on the receipt.
- **City of Purchase:** Enter the city in which the expense was incurred. For instance, if a train ticket for Florence to Rome was bought in Oxford, enter Oxford. Likewise, if a hotel was purchased in Rome, put Rome.  
This field will determine the default currency e.g. if you list Oxford, then the currency will default to GBP (£). This can be amended if the item was paid for in a different currency e.g. EUR (€). If there is no place of activity, e.g. for an online survey, put Oxford.
- **Amount:** Enter the amount paid in the original currency, and change the currency type if needed. If the relevant currency is not GBP, the system will automatically look-up the correct exchange rate for the date of purchase.

- **Receipt Status:** Select “Receipt”.
- **Project Related: Eligible Expense:** Depending on what is being claimed, the “**Project Related: Eligible Expense**” may display. In this case, please check the box as shown in the screenshot below. **If you do not do this, the system will not let you submit the claim.**

## Upload and Manage Receipts

- **Add Receipt:** Click the **Add Receipt** button or drag and drop the file on the right of the screen. This is also where you upload any other required documents e.g. proof of attendance/completion, booking confirmations, etc.
- You should save copies of your receipts on your computer with a name that is easy to recognise (e.g. “2022\_10\_01\_Flight\_Booking”). Ensure the file size is large enough for the details to be visible on a computer screen for review. We recommend saving at full size and checking the readability/quality/clarity of all files before upload.



If you are claiming for mileage you will need to enter the ‘from’ and ‘to’ location and then click on the mileage calculator.

New Expense Cancel **Save Expense**

Details **Itemisations** Show Receipt

**Mileage Calculator \*** Allocate

**Expense Type \*** Mileage **Cost Type \*** Project **Transaction Date \*** 15/12/2022

**From Location ?** Oxford OX1 3BD, UK **To Location ?** Reading, UK **Receipt Status \*** Receipt **Purpose of the Trip \*** Travel, accommodation & conference fee - RTSG

**Cost Type \*** (PJ) Project **Cost Code \*** (C0T00020\_C000.06) ... **Source of Funds ?** (00000) \*Default **Organisation** (10) University of Oxford

**Funder** **Comment** **Department ?** (C0) Social Sciences Division **Activity ?** Default

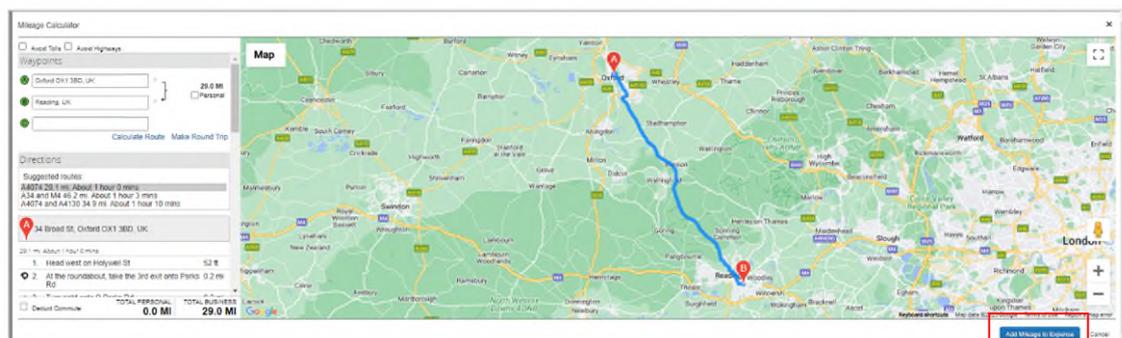
**Vehicle ID \*** XXXX OXF **Distance to Date** 0 **Distance \*** 29 **Number of Passengers** 0

**Amount** 13.05 **Currency** UK, Pound Sterling **Reimbursement Rates** [View all reimbursement rates](#)

**Fuel Receipt Date** DD/MM/YYYY **Fuel Receipt Type** None Selected

**Save Expense** **Save and Add Another** Cancel

This will open a map where you can amend the journey details, including a return trip etc. Then click on “add mileage to expense” button.



Click **Save**.

To enter a new expense, click on the **Add Expense** button (top left corner).

If yellow or red flags appear, click on them for an explanation of what the issue is. In most cases, some compulsory information will be missing, or a comment will be required to provide additional information about the purchase. Click on the relevant expense line and review/complete all compulsory boxed. SAP

Concur will normally raise a flag if the activity took place on a weekend, in which case you can ignore the flag.

To submit the claim for approval, click on the **Submit Claim** button (top right corner). Then click **Accept and Submit** in the pop-up window.

**Contact for queries:** [granduniondtp@socsci.ox.ac.uk](mailto:granduniondtp@socsci.ox.ac.uk)