**External Examiner (PGR & PGT only) Claim for fees and expenses**

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| --- | --- |
| **Important:** | This form should be used for Postgraduate Taught and Postgraduate Research Programmes only. Fees and expenses for Undergraduate programmes **must** be claimed on the undergraduate form.Forms should be completed and returned to the relevant Student and Education Services (SES) Admin Team as soon as possible after the examination, and no later than three months after the date of the meeting. **Please read the guidance overleaf before making a claim.** |

**External examiner details**

**Name**

**Date of Claim ID number**

**If you do not have this number please see guidance overleaf.**

**Address**

**Contact e-mail**

**SAA Admin Team Contact Details**

**Name**

**Generic contact e-mail for queries**

**Faculty & School**

**Payment details**

**For payments not in GBP then please write this clearly at the top of the form and change the £p to the appropriate currency**

Work undertaken

|  |  |  |  |
| --- | --- | --- | --- |
| **Ref #** | **Expense** | **Detail of claim** | **Cost****£p** |
| 1 | Fees |  |  |
| 2 | Travel |  |  |
| 3 | Subsistence |  |  |
| 4 | Incidental |  |  |
| 5 |  |  |  |
| \*Attach original receipts and supporting documentation using the ref # | Total of claim |  |

**Finance information:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Tax code** | **Account Code****(4 digits)** | **Subproject code****(9 digits)** | **Amount****£p** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Total |  |

All finance information must be completed before this is submitted to Accounts Payable.

Fees: account code 5621 Expenses: account code 5622

***For AP use***

*Trans type: RR, Text Prefix: ee*

**Declarations**

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| --- |
| **Claimant**I certify that this reimbursement request has been incurred necessarily on University business and adheres to financial regulations, policies and procedures. I confirm I havepersonally incurred the expenditure and have not reclaimed it by any other method. |
| Signed |
| Print name |
| Date |

|  |
| --- |
| **Budget holder**I confirm that expenditure detailed is appropriate, adequate funding is in place and that it adheres to financial regulations, policies andprocedures. I confirm that the claimant declaration is complete. |
| Signed |
| Print name |
| Date |

|  |
| --- |
| **Financial Approval**I confirm the expenditure is compliant with financial regulations and policies, has the proper tax treatment applied andhas received budget holder approval. |
| Signed |
| Print name |
| Date |

**Guidance for completing claim for fees and expenses:**

This form should be used by External Examiners for Postgraduate Taught and Postgraduate Research Programmes only to request reimbursement of annual fee and/or out of pocket expenses which were agreed by the budget holder prior to the expenditure being incurred. Full guidance for making claims is available on the University intranet at [https://sotonac.sharepoint.com/teams/FinancePlanningandAnalytics/SitePages/expenses-landing-page.aspx.](https://sotonac.sharepoint.com/teams/FinancePlanningandAnalytics/SitePages/expenses-landing-page.aspx) If you do not have access to this information, your SAA Admin contact will be able to provide help.

Payments will only be made where all of the authorisations and declarations have been completed and where all original receipts and supporting documents have been attached.

**This form has been set up to enable you to type your information directly into the fields. If you choose to handwrite the form then please print all information in CAPITALS as claims will not be paid where the claim is not legible.**

All parts of the form are mandatory.

# Further information for the external examiner details section

If it is anticipated that you will receive a number of payments then you will need to be or already have been set up with an ID number. Where required, this is normally set up at the start of your appointment. Please quote your ID number and any claim will be made to the bank details that we already hold.

If you have not been set up with an ID number then you must provide us with details for your payment on the Bank Information Form. Your SAA Admin contact will be able to provide you with a copy of the form. Note – Your claim can’t be paid without either an ID number or a completed Bank Information Form.

# Further information for the payment details section

**Fees**

Your fee will be included in your Letter of Appointment or contract sent at the start of your appointment.

**Mileage & mileage costs**

Your claim must give the overall number of miles, the starting point and the destination including postcodes. If the number of miles you are claiming does not match the number of miles calculated by the AA route planner, your claim must give a reason for the higher mileage or your claim will be reduced to match the AA route planner mileage.

The mileage cost is calculated by: The first 50 miles of the round trip will be paid at 40p per mile and the remaining mileage will be paid at 23p per mile.

A vehicle used on University business is done so at your own risk. You must ensure that your personal insurance policy provides cover for the use of the vehicle in connection with your “trade or profession”. Where equipment is to be carried, this activity should also be covered under the terms of your policy.

**Other expenses**

For expenses that have been agreed by the University of Southampton you must give the detail of the expense incurred, record the costs in the ‘costs column’ and attach original, itemised receipts.

You must convert your receipts into the currency that you are expecting payment in. So, if you are expecting your payment in GBP and have receipts in a foreign currency, you will need to convert these into GBP. If you have receipts in GBP and wish to be paid in an alternative currency, you will need to covert these into the alternative currency and update the £p at the header of the column to the appropriate currency. Either convert your receipts using the actual rate that you paid (providing evidence to prove the rate e.g. card statement or a currency exchange receipt) or use [www.oanda.com](http://www.oanda.com/) to convert each receipt using the exchange rate applicable for the date the expense was actually incurred.

If you have a number of receipts and attachments then please number each receipt or attachment with the ref # line number to help us match the receipts to the correct line of the claim.

# Submission of claim

Print, sign and date the claim in the claimant box, attach any receipts and then return to your SAA Admin contact at the University who will check the form has been fully completed, add the finance coding and arrange for the appropriate budget holder in the Faculty/School to sign the form.

Once authorised by the budget holder and the finance approver, return fully completed forms to expenses@soton.ac.uk

# Privacy Statement

The University of Southampton will only use the data you provide in this form to make a payment to you. Personal data you provide will not be shared with any third party for a separate purpose unless either the law requires us to do so, or you give us your consent to do so. For further information about how we safeguard personal data at the University, please view our privacy policy at [https://www.southampton.ac.uk/legalservices/what-we-do/data-protection-and-foi.page,](https://www.southampton.ac.uk/legalservices/what-we-do/data-protection-and-foi.page) and any relevant privacy notice provided to you.

For SAA Admin staff checking only

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| I have checked this claim for completeness, accuracy and compliance against the Financial Regulations, Policies and Procedures |
| **Signed** | **Print name** | **Date** |