

Step by Step Guide to Filling Out an EC Claim

Step 1.

Please have all your original receipts ready and numbered to be sent with the claim.

Step 2.

A photocopy of all receipts need to be submitted as required by Finance Division.

You can either photocopy onto A4 paper and include originals in a sealed envelope OR stick original receipts onto A4 taking care not to stick tape over the printed text as this also fades the ink. **Do Not Staple.**

Step 3.

For LSE Staff

Fill out an Expense Claim form by either using the blue paper form (available from your Department) or generated online at <http://www2.lse.ac.uk/intranet/LSEServices/financeDivision/accountsPayable.aspx>

For Non-LSE Staff Claimants

Please fill out a Payment Request Form (PRF) including claimant's bank details

<http://www.lse.ac.uk/intranet/LSEServices/financeDivision/pdf/paymentRequestForm.pdf>

+ Along with either of these forms we require an EC FP7 spread sheet filled out.

(This is to help with VAT separation required by EC to gain reimbursement for claims)

Step 4.

Please note for when filling out the FP7, you must include:

1. Full name and Doc Number; e.g. A12345 on blue forms or AB-12345.6789 on the electronic forms
2. Your project's Aptos code e.g. 1-RHE-U123.
3. Activity (select from drop down menu e.g. RTD)
4. The Work Package/Goal this claim relates to e.g. WP4

Aptos Code 1_***_****	Expense Code	Activity	Work Package/Goal/ Category

If receipts are from abroad, you must write down the exchange rate from the XE currency converter website:

<http://www.xe.com/travel-expenses-calculator/>.

Please set the exchange rate to the last date of travel.

However if you paid with card you can attach a copy of bank statement showing the transaction so the actual amounts are reimbursed (including the non-sterling transaction fee)

***For peace of mind and data protection feel free to black out personal details /unrelated transactions on the statement**

- Any VAT should be split and coded to 54805. Abroad, VAT comes under different names which can be easily overlooked
e.g. TVA in France, MOMs in Sweden
- Irrecoverable charges established by the EC, such as gratuity, Airport Passenger Service Duty, booking fees and credit card charges need be accounted for separately under the Irrecoverable expense code (54804)

VAT/Sales Tax In Original Currency	Other Irrecoverable s In Original Currency

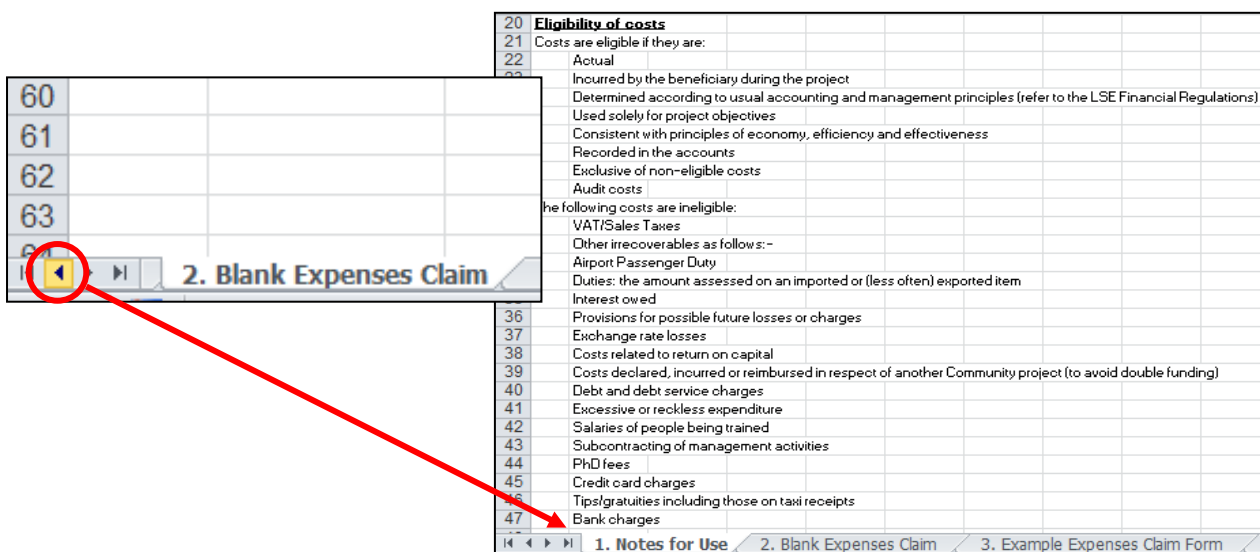
Please then sign the claim form and have your Department or Centre Manager countersign to authorise the expenditure before sending to the Research Division for processing.

Alongside this please select the 'Send Claim via Email' button at the top of the FP7 spread sheet in order to email to Post.Award@lse.ac.uk for our records.

Common issues with claims

1. Missing original receipts
Claims cannot be processed by Finance, unless with original receipts (this includes itemised bills and a transaction receipt to note breakdown)
2. Missing boarding passes
Based on EC regulations, claims for flights/Eurostar/trains missing original boarding passes do not get reimbursed.
For boarding passes on Smartphone please copy / take a screenshot.
If you are claiming flights before the date of travel, please send boarding passes to the Research Division (TW1 7.01) upon return and with your project code clearly marked on it for filing
3. Use of taxis in UK
Please provide reason for taxi use in UK (due to LSE financial regulations)
e.g. heavy luggage, no public transport option
4. Hospitality claims (Expense code:49004)
For meals with guests/ event catering; please provide list of names
5. Receipts being claimed outside 6 month period of being incurred expense
Provide justification as this is outside LSE financial regulations and will be queried
6. Flights/Train booked outside of Economy class
Please note the School's travel policy and provide justification if required
[<https://www.lse.ac.uk/intranet/LSEServices/financeDivision/internal/staff/pdf/TravelPolicy.pdf>]

Detailed notes for filling out the FP7 spread sheets can also be found on the FP7 spreadsheet if you click on the small back arrow at the bottom left hand corner (near 'Expense Claim' tab):



We hope this has been helpful for you, if you have any further questions or would like a one-on-one session to go through a claim please email Post.Award@lse.ac.uk.