

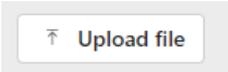
Click on the [Claims Form](#) link from the Committee Portal -> Finance -> Claim Forms (You can also click on the hyperlink above).

Please note, you will need to use your university login to submit this form. It will not accept any personal emails.

Filling Out Claim Form Request

You will then be taking to a copy of a claim form request for you to complete. You will then need to fill out the claim form request by answering **ALL** questions on the form (*please note, all questions are mandatory and must be completed*).

Below is a rough guide of how to complete:

1. **Payable To:** - This is who the claim will be paid to (*this should be yourself unless you are filling the form out on behalf of someone else*).
2. **Society** – Please enter the name of the society for which the claim will be taken from
3. **Claim Description** – This is where you will need to enter the description as to what the claim is for.
 - a. Please enter as much detail as you can (*do not put something generic like “Tesco/food shop”, it needs to include detail as to what the expenditure was for (such as food for event on DD/MM/YY)*).
 - b. If you have multiple receipts, please ensure that each receipt is accounted for in the description. If we can make no sense of why a receipt is attached because it hasn't been described why it was paid for and needed, then your claim may be rejected.
4. **Amount (£)** – Please enter the **TOTAL** amount
 - a. If you have more than one receipt you are claiming for, you will need to add these together. This question is for the total amount that you are claiming.
5. **Attach Receipts** – Click on the Upload File button 
 - a. This is where you will add the backup for the claim. This can be in the form of a receipt or an email that confirms the amount. This is a mandatory field, so you need to make sure that you have a copy of the backup to attach
 - i. Scanning apps, such as **Adobe Scan/Microsoft Lens** are good ways to scan receipts when you need to upload them.
 - b. You can upload more than one receipt.
 - i. The maximum files you can upload is 10. If you have more than 10 files you need to upload then you will need to do a separate claim form request for any files that do not fit on the first request.
 - c. Please ensure that each receipt/email confirmation clearly outlines the amount spent and the total amount tendered. Therefore it is vital that the **whole document** is visible and not just part of a document.
6. **Bank Details** – Please enter the bank details of the claimant.
 - a. Please ensure that the Account Holder Name and the name of the claimant are the same.
 - b. Please enter an account number (this is the 8 digit number)
 - c. Please enter a sort code (this is the 6 digit number in the format 00-00-00)
7. **Claim Form Request Submission** – Please read through question 9 to make sure you understand the process of what happens next and when to expect payment
 - a. Once you have read question 9, to confirm please choose **Yes**.
8. **Finish** – Once the form has been completed, please click on **Submit**.

The claim form will then be automatically emailed to Finance. Finance will then check over the request to ensure all relevant information and backup has been submitted. Finance will then send the claim on for authorisation from a committee member and a member of the societies team. You will receive an email that states that your request is pending and currently out for authorisation.

Once the committee authoriser has checked and signed the claim, it will then sent onto the Societies team at the HUBS, to further check that the claim is correct and that the society has enough funds in their account to cover the cost. Once

approved, you will receive a notification from Finance to inform you that it has been approved and the claim will then be paid at the next available payment run.

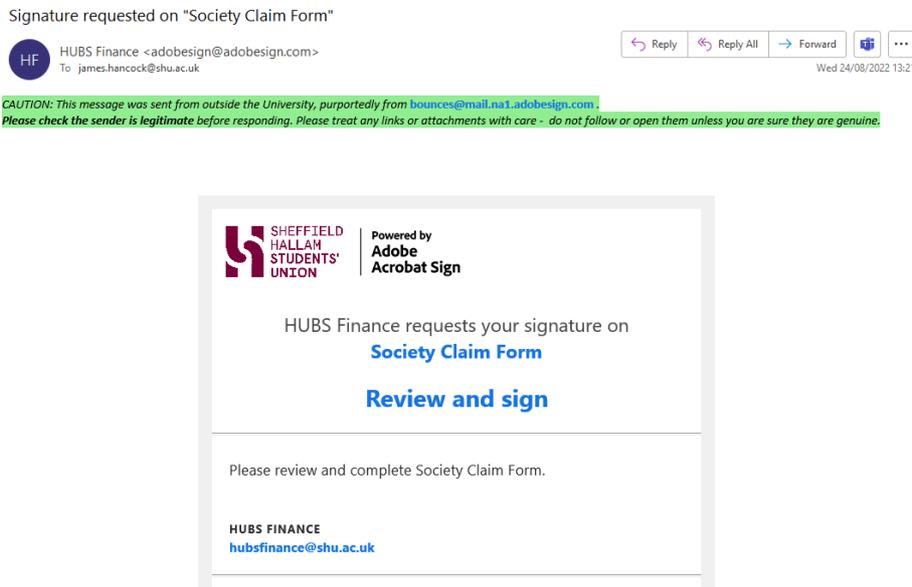
Rejected Claim

If a claim has been rejected for any reason, you will receive a notification informing you that the claim has been rejected and the reasoning why. This email may explain the further steps you need to take to get the claim authorised and what you should do next. Rejection does not mean that the claim will never be paid as it could be a case that something was entered incorrectly on the form and that you may just need to resubmit with the right corrections.

The claim may get fully authorised, but Finance may also spot an error with the claim once we process. This is usually if the bank details that have been provided don't pass the validation checks when performing the payment run. If this is the case, Finance will be in touch to gather the correct details required to complete the claim.

Authorising Claim Form – Committee Member

Once a society member has submitted a claim form and sent to you for authorisation, you will receive an email from “HUBS Finance” with a subject title **Signature requested on “Society Claim Form”**. There is a link in the email body to **Review and Sign**. Please click on this. Once the webpage has been loaded, you will need to click on **Continue** to proceed.



1. Please review and check the claim form that has been provided. You need to ensure that all the details match up. Things to look out for (and not limited to) should be:
 - a. Check who the claim is payable to and that you know who they are.
 - b. Check that the society name that has been provided is the society that you are a committee member of which the responsibility of signing off expenditure.
 - c. Check the **claim details** and the **amounts** to the receipts attached.
 - i. Make sure that the amounts entered on the claim tally up to the receipts provided. If they don't match up then you should reject the claim.



SOCIETIES CLAIM FORM

Please ensure all receipts are attached to the claim before submitting.
Your claim may be rejected without the correct backup.

Payable To: Society Member **Email:** societymember@my.shu.ac.uk **Date:** 24/08/2022

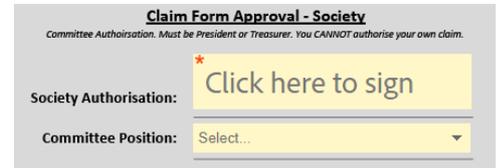
Society: Society Name **Request Ref:** SCF0001

Claim Description (Please Provide Full Details of ALL Claim Items)	Amount (£)	SHSU Staff Only		
		Cost Centre	Dept.	GL Code
Diesel	13.99			

Accepting Claim

If you are happy that the claim submitted has been submitted correctly and that you have checked it thoroughly, then you will need to authorise the claim. To do this you must:

1. **Claim Form Approval** - Click on the Sign button towards the bottom of the sheet once you are ready to authorise
 - a. Once you have clicked the sign button, you will be required to enter a signature. You can either draw a signature if you prefer, although we accept if you just type your FULL NAME into the popup box
2. **Committee Position** – Please select your position on the committee from the dropdown box.
3. **Click to Sign** - Once the form has been signed, and all mandatory fields are completed, please click on **Finish**.



By signing, I agree to this agreement, the [Consumer Disclosure](#) and to do business electronically with Sheffield Hallam Students' Union.

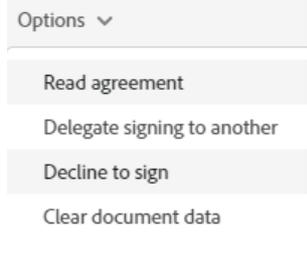
Click to Sign

Rejecting Claim

If you have checked the claim and you have found errors in the submission, or don't believe that what has been sent should be claimed back, you can reject the claim. To do this:

1. **Options** – Click on the Options at the top left of the page.
2. **Decline to Sign** – Click on Decline to Sign and then on Continue
 - a. It will ask you for a reason as to why you have decline, please enter this in here.

The document will now have been rejected and the reason why you rejected the claim will be sent onto to all parties.



Final Steps - Payment

Once all parties have authorised the claim, a copy is automatically sent to the finance department to process.

1. Finance will receive a copy of the Claim Form. Once received, they will process this through the societies accounts.
2. Payment will be made at the next available payment run.
 - a. Any claim **fully authorised** before **17:00** on a Thursday will be processed in the payment run that week. The payment run is processed on a Friday and payment will be made into the claimants account on the following **Tuesday**.
 - b. Any fully authorised claims submitted after this, will not be paid until the following week.