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| **Request for Advance of Expenses** **(for University staff)** |
| **General Information** |
| **All information must be supplied. Incomplete forms will be returned to Departments.****Section 1& 2 - To be completed by Claimant:** Once you have completed and signed sections 1&2 of this form, return the form to sender for authorisation.**Section 3 – To be completed by School/Department:** Coding information must be completed by the School/Department and the form sent for authorisation. **Section 4 – To be completed by authorised approver:** The form must be signed by a recognised signatory before being submitted via People and Money. Detailed guidance on the process can be found here: [Expenses (sharepoint.com)](https://uoe.sharepoint.com/sites/FinanceOperations/SitePages/Expenses.aspx)* Wherever possible accommodation, conferences fees and airfare tickets should be invoiced direct to the University avoiding the need for an advance.
* The claimant should submit a claim for expenses within one month of the date of return. Any balances due to or from the claimant (i.e. receipted expenditure is more or less than the advance paid) must be accounted for failing which they may be charged in full to the individual employing Department
* Claimants must not authorise their own expenditure e.g. a Principal Investigator’s advances request must be authorised by their Head of Department.

For information about our privacy policy and how we use your information please go to <https://www.edweb.ed.ac.uk/finance/about/privacy> |
| **Section 1: Claimant details** |
| Pay to (insert full name including title): |       | I will be away from (DD/MM/YYYY): |       |
| Employee Number: |       | I will be away until (DD/MM/YYYY): |       |
| Amount of advance: |       | School/Department Address: | Address line 1:      Address line 2:      Address line 3:      Post code:       |
| Purpose of advance: |       |
| School/Department: |       |
| Contact telephone number: |       |
| **Section 2: Claimants’ signature** (a wet signature is not required if the form is being submitted using a valid UoE email address): |
| Signature: |       | Date (DD/MM/YYYY): |       |

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| **Section 3: Costing Information** (for non-project related payments) – please refer to the [Guidance for the New Chart of Accounts GL tool](https://uoe.sharepoint.com/sites/FinanceHub/SitePages/Chart-of-Accounts.aspx)  |
|  | **% Split** | **Entity****(3 digits)** | **Fund****(6 digits)** | **Cost Centre****(8 digits** | **Account** **(4 digits)** | **Analysis** **(6 digits)** | **Portfolio****(8 digits)** | **Product****(8 digits)** | **Intercompany** **(3 digits)** |
| **EXAMPLE** | **MANDATORY % Split of the costing** | **Use the mapping tool** | **MANDATORY Required to capture the type of funding the cost is attached to** | **MANDATORY Organisational Unit (department)** | **MANDATORY****Refer to mapping tool** | **Likely to always be zero but cross check against the mapping tool** | **Likely to always be zero but cross check against the mapping tool** | **Likely to always be zero but cross check against the mapping tool** | **For cross charging to or from a subsidiary, cross check against the mapping tool** |
| EXAMPLE | 100% | 110 | 123456 | 12345678 | 0000 | 000000 | 00000000 | 00000000 | 000 |
| **Costing Split 1** |       |     |       |       |      |       |       |       |     |
| **Costing Split 2** |       |     |       |       |      |       |       |       |     |
| **Costing Split 3** |       |     |       |       |      |       |       |       |     |
| **Section 4: Costing Information** (for payments associated with projects) - please refer to the [Guidance for POETA and mapping information](https://uoe.sharepoint.com/sites/FinanceHub/SitePages/Chart-of-Accounts.aspx) |
| **Detail of expenditure** | **% split** | **Amount** | **Project number** | **Task Number** | **Expenditure Type** | **Expenditure Organisation** | **Contract number** | **Funding Source** |
|  |  |  | **MANDATORY****Use the mapping tool**  | **MANDATORY**Use mapping tool or task 1 if unknown | **MANDATORY****Use the mapping tool**  | **Always University of Edinburgh** | Take the first number set before the “-” in project number column |  |
| *Example* |  | *100* | *1172081-117083* | *1* | Select from drop down in the mapping tool  | *University of Edinburgh* | *1172081* | *Name of customer*  |
| **Costing Split 1** |       |       |       |       |       |       |       |       |
| **Costing Split 2** |       |       |       |       |       |       |       |       |
| **Costing Split 3** |       |       |       |       |       |       |       |       |
| **Section 5: Authorisation** - As an authorised signatory for this School/Department I confirm that funds are available to meet this expenditure. |
| Authorised Signatory: |       | Position: |       | Date (DD/MM/YYYY): |       |
| **Once authorised, please return to claimant to submit within People & Money following the** [**advances procedure guide**](https://uoe.sharepoint.com/%3Aw%3A/r/sites/FinanceOperations/Shared%20Documents/Accounts%20Payable%20Guides/Process%204.3%20D%20-%20Manage%20Advances.docx?d=w5f25ab65f66140448ef6ae5570a26589&csf=1&web=1&e=JiA0fd)**.** |