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| **SINGLE PAYMENT TO AN INDIVIDUAL IN A TAX YEAR** |
| **Guidance** |
| This form should be used when paying an individual a sum of £500.00 or less in any one tax year. Individuals submitting more than one invoice in the tax year must submit a self-employment status questionnaire. Please note the £500.00 limit is not a cumulative figure, only one payment up to no more than this value can be made using the single payment to individual form.**Claimant:** Please complete section 1 to 3 of the form and return to the approving department with back up papers.**Approving Department:** The costing information should be completed in sections 4 or 5 and the form should be submitted with any supporting documents to Finance.Helpline@ed.ac.uk. Please ensure you follow guidance on the SharePoint before submitting a claim using this form: [Self-Employment (Single Payment to an Individual) (sharepoint.com)](https://uoe.sharepoint.com/sites/FinanceOperations/SitePages/Self-Employment-%28Single-Payment-to-an-Individual%29.aspx) 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: Personal details** - (Please do not use any special characters i.e. accents, hyphens, apostrophes) |
| Full name (include title): |       |
| Address: | Address line 1:      Address line 2:      Address line 3:      Post code:       |
| School/Department: |       |
| Supplier number (if known): |       |
| Email address (for BACs remittance): |       |
| **Section 2: Payment details:** |
| Name on Account (if different from name above): |       |
| Bank/Building Society name: |       |
| Branch Address: |       |
| Account Number/Roll Number: |       | Sort Code: |       |
| IBAN: |       | BIC/SWIFT: |       |
| IFSC number or account type: |       | Routing or transit number: |       |
| Amount to be paid: |       | Currency (i.e. GBP, USD) |       |
| Reason for payment: |       |
| **Section 3: Declaration:** |
| I certify that payment in respect of the attached document be paid without the deduction of tax or national insurance as it will be the only payment made to me by the University in the current tax year. I am aware that in the highly unlikely event I request a further payment during this period, I will be liable to tax and national insurance on this payment which may be deducted from any future payments. |
| Claimant Signature: |       | Date (DD/MM/YYYY): |       |

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| **Section 4: Costing Information - please refer to the** [**Guidance for the New Chart of Accounts and General Ledger mapping tool.**](https://uoe.sharepoint.com/sites/FinanceHub/SitePages/Chart-of-Accounts.aspx?OR=Teams-HL&CT=1661875329362&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjA3MzEwMTAwNSIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D) |
|  | **Currency** **(e.g GBP, USD, EUR)** | **Payment Amount**  | **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)**  |
|  | **MANDATORY** |   **MANDATORY** | **MANDATORY**Use the mapping tool   | **MANDATORY** Type of funding the cost is attached to**​**  | **MANDATORY** Organisational Unit (department)  | **MANDATORY** Use the mapping tool  | Likely to always be zero - check the mapping tool | Likely to always be zero - check the mapping tool | Likely to always be zero - check the mapping tool | For cross charging to or from a subsidiary - check the mapping tool |
| *Example* | GBP | 150 | 110  | 123456  | 12345678  | 1234 | 000000  | 00000000  | 00000000  | 000  |
| **Costing Split 1** |       |       |     |       |       |      |       |       |       |     |
| **Costing Split 2** |       |       |     |       |       |      |       |       |       |     |
| **Costing Split 3** |       |       |     |       |       |      |       |       |       |     |
|  Section 5: 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?OR=Teams-HL&CT=1661875329362&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiIyNy8yMjA3MzEwMTAwNSIsIkhhc0ZlZGVyYXRlZFVzZXIiOmZhbHNlfQ%3D%3D) |
|  | **Currency** **(e.g GBP, USD, EUR)****MANDATORY** | **Payment Amount****MANDATORY**  | **Project number****MANDATORY** Use the mapping tool | **Task Number** **MANDATORY**Use mapping tool or task 1 if unknown | **Expenditure Type****MANDATORY**Use the mapping tool | **Expenditure Organisation**Always University of Edinburgh |
| *Example* | *GBP* | *150.00* | *1172081\_117083* | *1* | Drop down from mapping tool | *University of Edinburgh* |
| **Costing Split 1** |       |       |       |       |       |  *University of Edinburgh*  |
| **Costing Split 2** |       |       |       |       |       |  *University of Edinburgh*  |
| **Costing Split 3** |       |       |       |       |       |  *University of Edinburgh*  |
| Prepared by (used for approval route): |        | Date (DD/MM/YYYY): |        |
| **NOTE:** When requesting a payment to a UK bank account, any foreign currency claims should be converted to sterling at the nearest applicable exchange rate to the date of the transaction and claimed in sterling “including any charges”. If the claim is to be paid to an overseas account, the claim should be converted to the relevant currency for that account i.e. to make a payment to an account held in Germany claims should be paid in EUROS. Please refer to the [currency list](https://uoe.sharepoint.com/%3Aw%3A/r/sites/FinanceOperations/Shared%20Documents/Currency%20List%202022.docx?d=w45a8166d08794ad5bca2b9d4556f374d&csf=1&web=1&e=x27CI5) for details of the types of currency held in People and Money. You can use: [xe.com](https://eur02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.xe.com%2F&data=05%7C02%7C%7Cd9cf67b61e774eef62dd08dc3967fdba%7C2e9f06b016694589878910a06934dc61%7C0%7C0%7C638448366003937588%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C0%7C%7C%7C&sdata=VAgmSJ8WjygRkEYhCV0%2BgYvpEOdzPpLOsywhmjufvGE%3D&reserved=0) to convert the transaction, a copy of the conversion calculation must be attached to the claim. |