**Sheffield Methodist District – Expense Claim Form**

The Claim Form is an Excel spreadsheet with 3 tab (sections).

If you have any questions or problems with this, please let me know and I will try and resolve them.

**Itemised Receipts Tab – this must be completed as fully as possible**

|  |  |
| --- | --- |
| **Name:** | Who is making the claim |
| **Role:** | This has a drop-down section - if your role is not listed, then choose "Other" |
| **Claim Period:** | the period this claim relates to |
| **Date of claim:** | the date you submit the claim form. |
|  |  |
| **BACS details** | Payment is made by Bank Transfer. Cheques will only be issued in exceptional circumstances. |

|  |  |
| --- | --- |
| **Itemised Details – Receipts are required.** | |
| **Ref:** | Please number all receipts. This is to help in case of queries about a claim. |
| **Date:** | The date on the receipt |
| **Payee:** | who you paid / name of shop etc |
| **Description:** | What was this for - to help check that the correct category has been chosen |
| **Category:** | **This must be completed.**  As with Role, there is a drop-down menu for you to choose from.  If you are not sure, choose "Other Costs"  **If you do not fill this in, the Summary form will not work** |
| **Amount:** | How much is being claimed. |

**Receipts in support of your claim should be included with the claim. These can be photographed or scanned and attached in the email or sent in separately by post.**

**Mileage tab**

*Travel by public transport and parking should be claimed on the Itemised Receipt tab*

|  |  |
| --- | --- |
| **Mileage Claim** | |
| **Please note that from 1 September we must have proof that your car/motorbike insurance covers occasional business use.** | |
| **Date** | Date of travel |
| **Purpose** | Where to/why- e.g. Hallam centre, DLT meeting (plus the names of any passengers) |
| **Mode** | How did you travel e.g. car + 1 |
| **No of Miles** | Distance travelled |
| **£** | This will automatically calculate the amount to be claimed, based on your mode of travel. You should not need to make any changes to this. |

You do not need leave any rows blank.

There is space for 35 entries. This should be sufficient for a single month's claim. If you need more then please start a new claim.

**Summary Tab**

The Summary section works by adding all the entries for each category from the Breakdown section.   
You should not need to alter any of this if you have filled the Itemised and Mileage tabs correctly.

If you have any questions about this, please contact Katrin in the District Office (0114 270 9990).

**Submitting a claim**

Save each claim as a new file. You should be able to do this by using the **Save As** option (do not use the Ctrl-S keystrokes, or Save – this will overwrite the blank template).

To enable the office to keep your claims together, and in chronological order, please use the following system: initials followed by year-month\_number (for example KH 2020-02 for a claim relating to February 2020)

Email the saved claim form to the District Office . Scanned/photographed receipts can also be attached to the same email. Alternatively all of the spreadsheets and post them, along with receipts to the District Office.