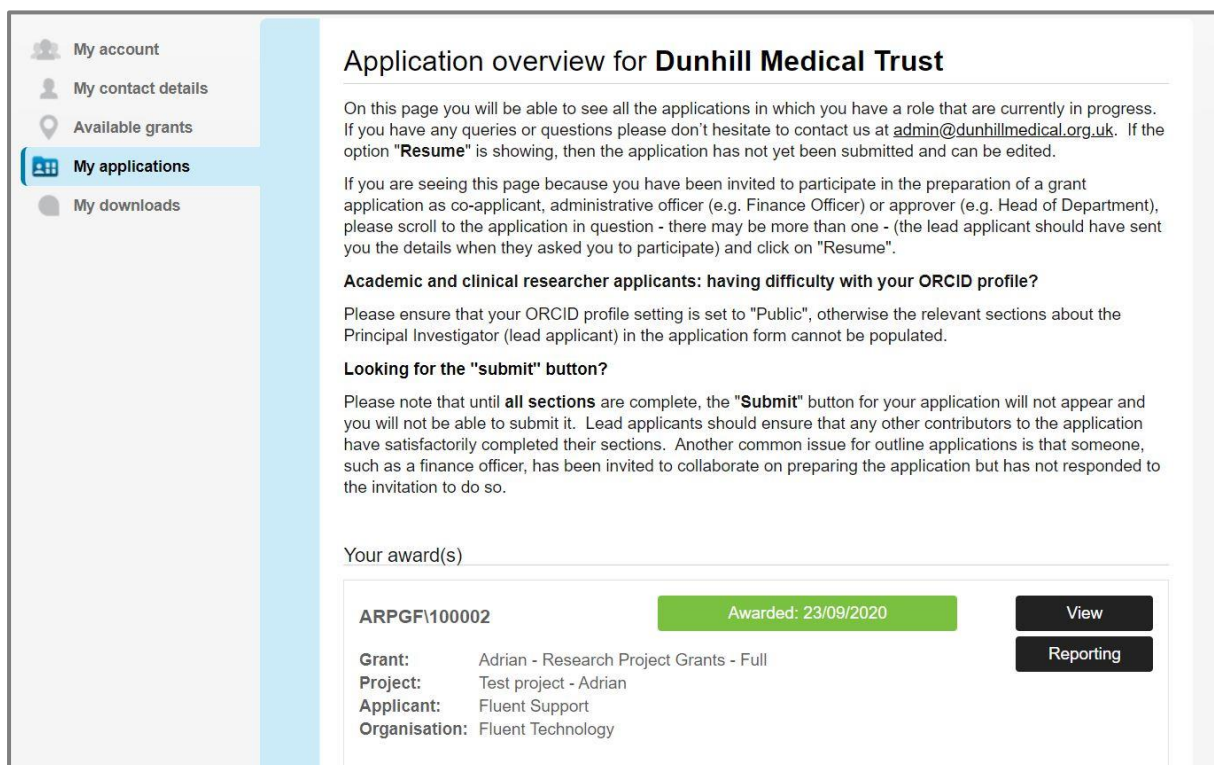


## Instructions for submitting an expenditure claim form (for finance or research support staff) – for grants awarded from June 2019 onwards

*Please note that the person who completed the finance section of the application form is typically assigned permission to complete and submit Claim Forms. If this needs to be reassigned to a different person, please contact your grants officer. We aim to contact you and confirm who will be responsible for completing Claim Forms towards the end of the first quarter of your grant.*

You will first need to log onto the [grants management portal](#) with your login details.

Click on **Application Portal** (top left of screen), then select **'My applications'** from the menu on the left. The grants for which you are the named finance officer, or have been assigned permission to complete Claim Forms, will then appear as shown below:



The screenshot shows the 'Application overview for Dunhill Medical Trust' page. On the left is a navigation menu with options: My account, My contact details, Available grants, My applications (highlighted), and My downloads. The main content area includes:

- Application overview for Dunhill Medical Trust**
- Text: "On this page you will be able to see all the applications in which you have a role that are currently in progress. If you have any queries or questions please don't hesitate to contact us at [admin@dunhillmedical.org.uk](mailto:admin@dunhillmedical.org.uk). If the option **'Resume'** is showing, then the application has not yet been submitted and can be edited."
- Text: "If you are seeing this page because you have been invited to participate in the preparation of a grant application as co-applicant, administrative officer (e.g. Finance Officer) or approver (e.g. Head of Department), please scroll to the application in question - there may be more than one - (the lead applicant should have sent you the details when they asked you to participate) and click on **'Resume'**."
- Academic and clinical researcher applicants: having difficulty with your ORCID profile?**  
Text: "Please ensure that your ORCID profile setting is set to **'Public'**, otherwise the relevant sections about the Principal Investigator (lead applicant) in the application form cannot be populated."
- Looking for the "submit" button?**  
Text: "Please note that until **all sections** are complete, the **'Submit'** button for your application will not appear and you will not be able to submit it. Lead applicants should ensure that any other contributors to the application have satisfactorily completed their sections. Another common issue for outline applications is that someone, such as a finance officer, has been invited to collaborate on preparing the application but has not responded to the invitation to do so."
- Your award(s)**
- A table showing one award: ARPGF100002, awarded on 23/09/2020. Below the award ID are buttons for 'View' and 'Reporting'. Further down, details are listed: Grant: Adrian - Research Project Grants - Full; Project: Test project - Adrian; Applicant: Fluent Support; Organisation: Fluent Technology.

Next, select the **'Reporting'** button and you should be taken through to a screen that shows any reports and Claim Forms associated with the grant, as shown below:

- My account
- My contact details
- Available grants
- My applications
- My downloads

## Reports & activities for: Adrian - Research Project Grants - Full : ARPGF100002

### Test project - Adrian

Fluent Support  
 Fluent Technology

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Awarded: £2,450.00 Awarded

### Reporting Forms - progress reports, monitoring & other forms

Reporting forms relating to this grant are available below. Please complete any outstanding forms, or you can submit a new form.

Name	Date Due	Assigned to	Status	Submitted by
Research Project Grants Final Report (Reporting)	30/09/2020	Gemma Dasent	Not started	

### Claim forms

Claims relating to this grant are listed below. Please complete outstanding claims, or submit a new claim.

Claim Ref	Created By	Status	Submitted by	Amount
No records to display.				
<b>Total Accepted:</b> £0.00				

Within the 'Claim forms' section, select the 'New claim' button. This should cause a new Claim Form to be created:

### Claim forms

Claims relating to this grant are listed below. Please complete outstanding claims, or submit a new claim.

[Open application form](#)

**New claim**

Claim Ref	Created By	Status	Submitted by	Amount
1	Oliver Soutar	Not started		£0.00
<b>Total Accepted:</b> £0.00				

Hover over the three dots next to the form and click 'Complete Form'. You will be asked to provide the start and end dates for the quarter covered by the claim. For each item in the budget, detail your actual expenditure for the quarter versus that forecasted. **Please only do this for the quarter in question (for example, if this is the first quarter of the grant fill in the 'Q1 Year 1' column) – do not edit any values in previous or future columns, and only complete a claim for one quarter:**

Claim Start Date

DD/MM/YYYY



Claim End Date

DD/MM/YYYY



Please add details of your actual expenditure against the costs detailed in the project budget.

Add another period Expand

Budget heading		Q1 Year 1	Q2 Year 1	Q3 Year 1	Total
<b>Salary</b>					
	Actual Expenditure	£10,198.00	£10,198.00	£10,198.00	<b>£40,792.00</b>
	Awarded amount	£10,198.00	£10,198.00	£10,198.00	<b>£40,792.00</b>
	Payment Value	£0.00	£0.00	£0.00	<b>£0.00</b>
<b>Salary Total</b>	<b>Actual Expenditure</b>	<b>£10,198.00</b>	<b>£10,198.00</b>	<b>£10,198.00</b>	<b>£40,792.00</b>
	<b>Awarded amount</b>	<b>£10,198.00</b>	<b>£10,198.00</b>	<b>£10,198.00</b>	<b>£40,792.00</b>
	<b>Payment Value</b>	<b>£0.00</b>	<b>£0.00</b>	<b>£0.00</b>	<b>£0.00</b>

If you need to add a new item of expenditure, you can do so by scrolling to the bottom of the budget and clicking the 'Add A New Item' button. Once you have detailed your expenditure, you will be asked to provide a payment reference for the claim. You can also upload an invoice from your institution which corresponds to the claim:

### Claim Payment Reference

Please provide a payment reference for this claim.

Payment Reference



### Invoice for Claim

Please upload the associated invoice for this claim.

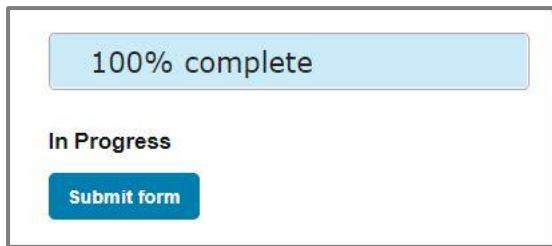
Choose your file(s) *or drag and drop files here to upload*

File name

Date uploaded

Action

The form can be saved at any point, but the **'Submit form'** button will only appear at the top of the page once the form has been completed:



A screenshot of a form completion interface. At the top, a light blue progress bar is filled and labeled "100% complete". Below the progress bar, the text "In Progress" is displayed. At the bottom, a blue button with white text labeled "Submit form" is visible.

Once you have submitted the Claim Form, we will review it and will either schedule payment for the upcoming payment run or contact you if we have any questions. We do try to send out regular reminders for any upcoming or overdue claims, but it is also worth setting your own reminder to complete the next Claim Form in another quarter's time.