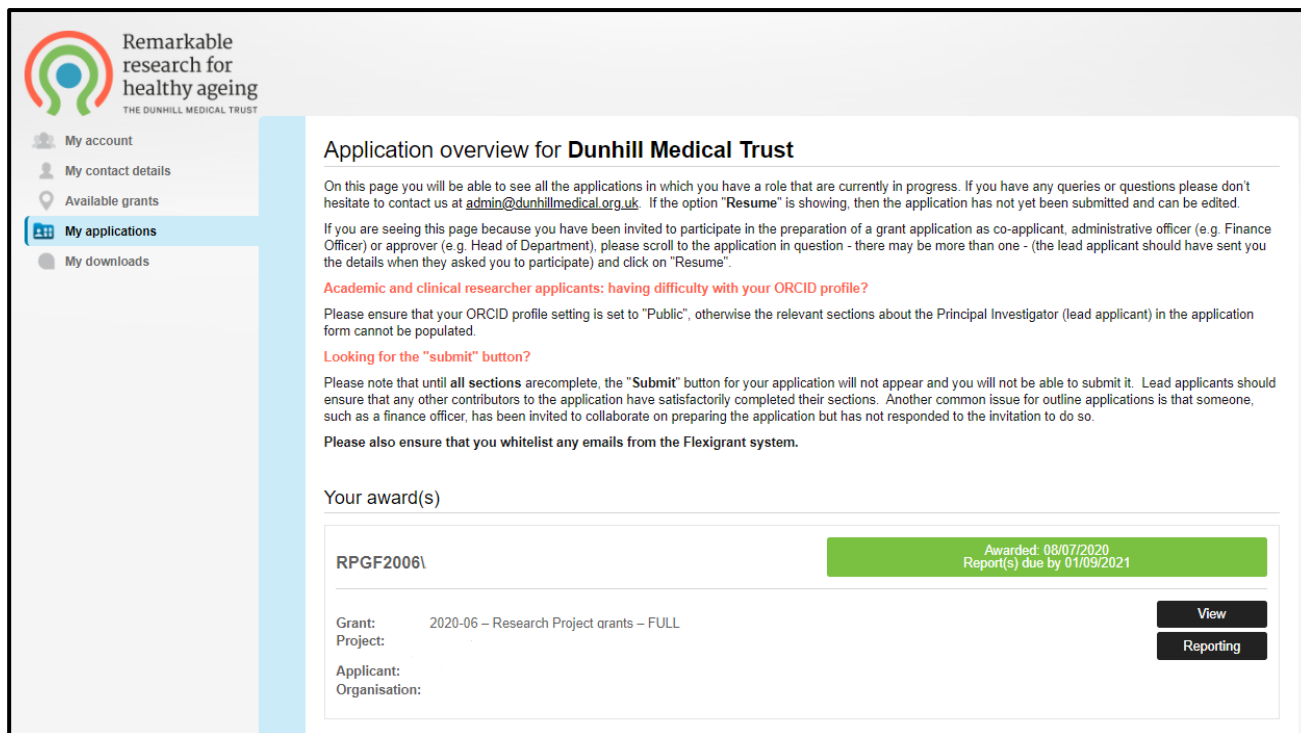


Guidance for submitting a Financial Claim Form (for finance or research support staff)

Please note that the Financial Claim Form is typically assigned to the person who completed the finance section of the application form. If this needs to be reassigned to a different person, please contact your grants officer or email grants@dunhillmedical.org.uk

Financial Claim Forms should be submitted on a quarterly basis through our online grants management portal. You will first need to [log on to the portal](#) with your login details.

Once you have logged in, click the **Application Portal** button at the top-left of the screen, then select **My applications** from the menu on the left. Any current grants to which you are assigned will then appear as shown below:



The screenshot shows the 'My applications' page in the grants management portal. 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 is titled 'Application overview for Dunhill Medical Trust'. It contains several paragraphs of text providing instructions and information for applicants, including contact details for the grants officer and advice on ORCID profiles and the 'submit' button. Below the text is a section titled 'Your award(s)' which displays a table with one row for grant 'RPGF2006\'. The table includes a green status bar indicating the award date (08/07/2020) and the reporting due date (01/09/2021). Below the table, there are fields for Grant, Project, Applicant, and Organisation, along with 'View' and 'Reporting' buttons.

Grant	Project	Applicant	Organisation
RPGF2006\	2020-06 – Research Project grants – FULL		

Click the **Reporting** button to see a list of any reports that are scheduled/due for submission. When the list of reports appears, hover over the three dots next to the Financial Claim Form and click **Complete form**.

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)	21/03/2023		Not started	⋮
Research Project Grants Progress Report (Reporting)	21/06/2022		Not started	⋮
Financial claim form - 20-06 Research Project Grants (Reporting)	01/09/2021	Test Finance Manager	Not started	⋮

To submit the Financial Claim Form, you are required to complete and upload an excel claim form (using the template provided) detailing your grant expenditure for the quarter in question.

First, download the blank excel form by clicking on the link in the Financial Claim Form:

Page 1 of 1: Quarterly Financial Claim

Financial claim form - 20-06 Research Project Grants (1) 0% complete

RPGF2006\ Date Due: 01/09/2021

Officer: **In Progress**

[Print form](#) [Download as PDF](#)

[View instructions](#)

You will be logged out after 114 minutes 58 seconds of inactivity. Please ensure that you save your work regularly.

[Save page](#)

Please detail your actual expenditure for the quarter using [this excel claim form](#).

Once completed, please re-upload the claim form using the file upload below. Remember that expenditure should be claimed on a quarterly basis - please select the quarter for which you are claiming using the dropdown list in the 'Period' column.

For each item entered into the form, select which budget heading it belongs to (this should correspond to the budget in the original application) using the dropdown list in the 'Item Type' column.

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

File name	Date uploaded	Action
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Complete the excel form by listing the budget items you are claiming for (please note, these should correspond to the items in the budget within the grant application) and the amount being claimed for each. For each item, select the **Item Type** from the dropdown list (again, this should correspond to the headings in the budget within the grant application). Use the dropdown box in the **Period** column to select the period being claimed for (e.g. if this is the first claim, select “Year 1 – Quarter 1”).

Item No.	Item	Item Type	Period	Amount Requested (£)
1	Salary for postdoctoral researcher	Basic salary	Year 1 - Quarter 1	£12,000.00
2	NI/Pension for postdoctoral researcher	NI & Pension	Year 1 - Quarter 1	£4,000.00
3	Travel from uni - research site	Travel to research sites or for participants	Year 1 - Quarter 1	£355.50
4				
5				

Once you have completed the excel form, please re-upload it to the Financial Claim Form using the file upload function. You’ll also need to provide a payment reference and (except in the case of a nil claim) an institutional invoice that matches the amount being claimed.

Please detail your actual expenditure for the quarter using [this excel claim form](#).

Once completed, please re-upload the claim form using the file upload below.
Remember that expenditure should be claimed on a quarterly basis - please select the quarter for which you are claiming using the dropdown list in the 'Period' column.

For each item entered into the form, select which budget heading it belongs to (this should correspond to the budget in the original application) using the dropdown list in the 'Item Type' column.

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

File name	Date uploaded	Action
Excel Claim form_21-04 onwards.xlsx	25/08/2021 14:12:41	× Delete

Payment Reference

Please provide a payment reference for the claim.

Q1Y1 RPGF2006\TEST *

Please upload an invoice that supports your claim.

If there is no expenditure to be claimed for this quarter (i.e. you are submitting a nil claim), you do not need to upload an invoice. However, if there is expenditure to be claimed you must upload an invoice that matches the claim.

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

File name	Date uploaded	Action
Q1Y1 Invoice.pdf	25/08/2021 14:14:58	× Delete

Save page

You can save your progress at any time by pressing the **Save page** button. Once all sections of the form are complete, the **Submit form** button will appear at the top of the page.



The image shows a screenshot of a form completion progress bar. At the top, a light blue bar contains the text "100% complete". Below this bar, the text "In Progress" is displayed. At the bottom of the progress bar area, there is a blue button with the text "Submit form".

Once you have submitted the Financial 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 Finance Report in another quarter's time.

If you have any questions about completing a Financial Claim Form, or run into any issues, please get in touch by emailing grants@dunhillmedical.org.uk