

## Guidance for Special Fund Expense Claims

### Guidance for claimants

1. Your fundholder will provide you with a unique link to your fund's claim form by email. Alternatively, please contact [specialfunds@gsttcharity.org.uk](mailto:specialfunds@gsttcharity.org.uk) to request this link. The link will take you to an on-line form.
2. To complete a claim please complete the Description, Date Incurred and Amount Claimed for each item with the details of the items you purchased, the date you incurred the expense, and the amount you want to claim for the expense. All expenses need to have a receipt uploaded using the Choose file button. This can be a photo of a paper receipt, an email receipt or a scan of a document. Please make sure costs are clearly visible in the image.

**Claim Details**

All claims must be itemised and supported by a receipt. We will not repay any claims which do not have a receipt. For description, we want to know what the claim relates to, eg accommodation costs 3 nights, refreshments for support meeting, Amazon books for waiting room area, candles for chapel

Description *	Date Incurred *	Amount Claimed *	Receipt
<input type="text" value="train ticket"/>	<input type="text" value="17/08/2018"/>	£ <input type="text" value="20"/>	<input type="button" value="Choose file"/> train ticket Stansted.jpg
<input type="text" value="conference fee"/>	<input type="text" value="01/08/0018"/>	£ <input type="text" value="300"/>	<input type="button" value="Choose file"/> conference receipt.docx <a href="#">Remove</a>

[Click to add another expense](#)

Amount Claimed  
£ 320

3. To add further expense items click on 'Click to add another expense'. This can be repeated for as many expense items as required. If you have multiple receipts for similar things, such as refreshments, then you may prefer to have just one entry for this, with total of costs and then photocopy all relevant receipts onto one page which can be scanned and uploaded as a single document.

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- Please fill in the 'supporting information' box with details of your claim eg- 'attendance at the Renal Conference 3-6th September in Birmingham' or 'lunch for 12 people for patient support group'. Use this space to clarify the reason for any unusual or large expenses.

**Guidance for supporting information:**

Please use the below space to provide supporting information, such as information about the event or training attended, or why equipment is needed, and to explain how the cost supports the charitable objectives of your special purpose fund.

**Supporting Information**

I was travelling to the ISGI conference in Belfast 18-20th August to present a study we had completed.

- If you have already spoken to your fund's fundholder about submitting this claim please tick the 'yes' box and add the name of the fundholder you've spoken to.

Have you spoken to a fundholder about this claim?  Yes  No

Please confirm which fundholder you've spoken to.

- For travel, hotel, and other costs incurred by attending a meeting or conference please attach some proof of attendance, ideally a certificate of attendance, or otherwise your booking confirmation or meeting minutes/agenda.

**Evidence of attendance at conferences/training/meetings**

certificate o...nce ISGI.docx

*If you have claimed for travel or accommodation expenses as a result of attendance at a meeting, conference or training costs, please upload evidence of attendance. This may be in the form of a certificate, meeting minutes or email confirmation of attendance.*

## Guidance for Special Fund Expense Claims

- Then complete all your contact details so that we can contact you should we have any queries about the claim and so that correspondence regarding the claim can be sent to you. Please also complete your bank details carefully as all payments are made via BACs.

**Claimant Contact Details**

**First Name \***  
Tertius

**Last Name \***  
Lydgate

**Email Address \***  
tertius.lydgate@gstt.nhs.uk

**Phone**

**Street**  
Dept. of Infectious Diseases

*Enter building, street etc (the first lines of your address) on separate lines*

**Town/City**

**County**

**Postcode**

**Claimant Bank Details**

<b>Bank Name *</b> Halifax	<b>Sort Code *</b> 012345
<b>Account Name *</b> Dr T Lydgate	<b>Account No. *</b> 12345678

All claims will be repaid by a BACS transfer

- Check that you agree with the claimant declaration and then click submit at the bottom of the page.

**Claimant Declaration**

*Please read the following and then tick the box to signify your agreement.*

I DECLARE that the amounts claimed are in respect of expenses actually and necessarily incurred on behalf of the stated Special Purpose Fund.

I CONFIRM that the expenses have/will not be paid by any other organisation and I have deducted any advances and personal benefits I have received.

I HAVE read and understood the Charity's Data Privacy Statement regarding use of the above personal data and confirm I agree to this use of personal data? (<https://www.gsttcharity.org.uk/content/data-privacy-statement>)

I agree with the above statements \*  Yes  No


8. You will then be taken to a preview of your claim. Check that all the details are correct and that the necessary documents are uploaded. If it is all correct please click 'confirm' to submit your claim. If you wish you can make a correction to the form or print your claim. You will not be able to do this once you have clicked on Confirm.


After you click on the 'Submit' button, you will be able to review your claim. If you would like to keep a record of your claim please click on 'Print this page' before confirming, and you will be able either to print a hard copy or to save as a pdf document. You will **not** be able to do this once you have clicked on the 'Confirm' button.

*Attached Files:*

train ticket Stansted.jpg (97 KB)  
conference receipt.docx (1.54 MB)  
certificate of attendance ISGI.docx (1.54 MB)

Confirm

 [Make a correction](#)

 [Print this page](#)

9. Once the fundholder has approved your claim it will be processed within 10 working days. You will be kept informed by email of when your claim has been sent to the fundholder and when it has been approved. We will also let you know if the fundholder rejects your claim and provide their reasons to you by email.