MGS Student Guidance - Funding



The MGS ESRC DTP provides funding towards students' research-related activity. The financial regulations that you will need to abide by and the processes you need to follow can be quite complex. The aim of this webpage is to help you to understand some of these requirements, which should help you to plan your funding requests and to understand some of the processes you will need to undertake to use your approved funding. If you have any queries, before or after your application for funding is submitted, please get in touch (esrcdtp@warwick.ac.uk).

General Principles

Purchases which use your MGS DTP funding must be approved, booked and paid for through the Warwick MGS. We will deal with the funding and payment of the activity; however, your home department may still be involved in facilitating some of the requirements e.g. by signing off a risk assessment.

- Funding must be applied for and approved before bookings are made or expenditure is committed to.
- Any needed risk assessments, overseas travel declaration forms, ethics approvals, FinRegs/Procurement/IDG etc approvals must be gained prior to any bookings/orders being made or expenditure incurred.
- Please ensure you allow sufficient time for your application to be reviewed and for you to follow all of the processes required before your research activity is due to commence. For Overseas Institutional Visits (OIVs) and Overseas Fieldwork (OSFW), it is recommended that you submit your application 6-9 months before your visit.
- Warwick's Financial Regulations must be adhered to unless an exemption has been formally granted. This includes using Warwick approved suppliers for the purchase of items.

- Funding can only be used for what was approved in the application. Any changes need to be authorised by the esrcdtp@warwick.ac.uk, before any bookings are made or expenses incurred.
- Under MGS policies, subsistence cannot be claimed for (and neither can travel undertaken to purchase food or attend meals). The only exception to this is a dinner, which forms part of a Conference package.
- If you are concerned about being to afford to pay for something and then claim it back, please enquire about us booking it on your behalf using a Precision Pay payment.
- Claims must be made within 3 months of incurring the expense.
- If you are unsure of any of the processes, procedures or requirements, please get in touch with esrcdtp@warwick.ac.uk and we will be able to advise you.

Funded Opportunities

All students have a Research Training Support Grant (RTSG) to use on activities to support their research.

MGS2 students are required to undertake a 91-day (13 weeks) Research in Practice (placement) opportunity. A similar set of opportunities, know as 'Additional Funding Opportunities' are available to MGS1 students as well, but is not a requirement.

All approvals, ordering (if applicable) and paying for ESRC-funded opportunities must be made by the MGS DTP. On rare occasions we may ask the Home department to be involved. Please contact us for advice, if you have any questions.

Research Training Support Grant (RTSG)

- MGS1 students have £2,250 of RTSG, whilst MGS2 students have £3,000 during their studentship.
- You must complete an MGS1 or MGS2 RTSG application before any expenses are incurred. Depending on the complexity of the request, this will determine the length of time it will take for the application to be considered.
- Please also bear in mind any additional approvals that will/may be required such as Risk Assessments and Ethics, FinRegs Exemption Requests.
- You must use Approved Suppliers unless otherwise approved. For Transport and Accommodation this does not have to be booked through Key Travel if the trip is in the UK/Europe and costs less than £1,000.

- Repeated submission of applications after the expense has occurred, may result in the application not being approved and therefore the expenditure not being covered.
- Depending on what your RTSG application is for, will depend on what sections of this webpage are relevant to your application. Please ensure that you **review all the sections relevant to your proposed activity**.
- If your research activity involves an overnight stay, please consider the Permitted Travel/Accommodation Dates.
- Expenses must be claimed within 3 months of incurring the cost.

Overseas Institutional Visit (OIV)

- Students can apply for up to £1,666.66 per month (maximum £5,000)
- You must complete an MGS1 or MGS2 OIV application before any expenses are incurred.
- Whilst writing your OIV application, please refer to the relevant sections on this webpage.
- Please also bear in mind any additional approvals that will/may be required such as Risk Assessments and FinRegs approvals.
- For Transport and Accommodation this needs to be booked through Key Travel, if it is the trip is outside of Europe or if the OIV is in Europe and costs more than £1,000, unless FinRegs approval is granted.
- Please review the Permitted Travel/Accommodation Dates and make it clear on your OIV application if any personal leave will be taken at the beginning, middle or end of your OIV.
- Expenses must be claimed within 3 months of incurring the cost.

Overseas Fieldwork (OSFW)

- Students can apply for up to a maximum of £8,000.
- You must complete an MGS1 or MGS2 OSFW application before any expenses are incurred.
- Whilst writing your OSFW application, please refer to the relevant sections on this webpage.
- Please also bear in mind any additional approvals that will/may be required such as Risk Assessments and Ethics and FinRegs approvals.

- For Transport and Accommodation this needs to be booked through Key Travel, if it is the trip is outside of Europe or if the OIV is in Europe and costs more than £1,000, unless FinRegs approval is granted.
- You must use Approved Suppliers e.g. for Dictation and Transcription Services, the purchase of equipment. Whereby, approved suppliers are not appropriate, for example Edenred vouchers may not be suitable for participant payments, or you are organising an event and catering which takes place off campus, a FinRegs approval will be required.
- Please review the Permitted Travel/Accommodation Dates and make it clear on your OSFW application if any personal leave will be taken at the beginning, middle or end of your OSFW.
- Expenses must be claimed within 3 months of incurring the cost

UK Institutional Visit (UKIV) / Non-academic placement in the UK

- Students can apply for up to £1,000 per month (maximum £3,000).
- You must complete the MGS1 or MGS2 UK Institutional Visit or Non-academic Placement application before any expenses are incurred.
- Whilst writing your application, please refer to the relevant sections on this webpage.
- For Transport and Accommodation this does not have to be booked through Key Travel if the trip is in the UK and costs less than £1,000 or you will be staying in the host university's accommodation.
- Please also bear in mind any additional approvals that will/may be required such as FinRegs approvals.
- Please review the Permitted Travel/Accommodation Dates and make it clear on your application if any personal leave will be taken at the beginning, middle or end of your UKIV or non-academic placement.
- Expenses must be claimed within 3 months of incurring the cost.

Transport and Accommodation

As a student at Warwick, you are expected to live within a reasonable distance of the university.

Key Travel must be used for booking all travel and accommodation within the UK and Europe where the combined travel and accommodation costs will exceed £1,000 and for all travel and accommodation outside of Europe regardless of cost. Where using Key

Travel is a requirement but you have reasons why this is not appropriate, a FinRegs exemption may be sought.

Public Transport

- Public transport should be the default mode of transport for all journeys within the UK and all other journeys of up to 6 hours, even if the financial cost is higher than other forms of transport**.** You must travel by Standard Class.
- You are expected to live within a reasonable distance of Warwick. If you do not live in the vicinity of Coventry or Leamington Spa, then you will be asked to provide quotes for your journey from the University to your destination and from your home address to the destination. You will be approved funding for and reimbursed for the cheaper option.
- If you are travelling on the London Underground please register your details with TfL beforehand so you can download the details of your trips and their cost.
- You need a receipt even if you make a contactless payment (if not automatically offered you will need to ask for a receipt).
- When you are abroad, for local transport (e.g. bus, train, tram), you are not required to use Key Travel. However, you are required to use Key Travel for internal flights (e.g. if you took an internal flight in India).

The Use of Taxis

- The use of taxis are permitted for short journeys where no other form of transport is available or suitable or for safety concerns. However, the use of the taxi including the reason for it, would need to be detailed in your funding application and on the Concur claim. Claims, which do not include the reason in the comment, may be rejected by Expenses.

Private Car

- Road journeys exceeding 100 business miles per day should only be considered where travel by train is not a viable option, and a hired vehicle, rather than a private one, should be the preferred option (but a Warwick approved supplier must be used for renting a car).
- Your car must be insured for Social, Domestic, Pleasure, and Commuting.

Mileage Expenses

- As of 1st December 2025 the University of Warwick mileage expenses policy was revised.

- Under the new policy, if you wish to claim for mileage from your normal place of residence (home address) to another destination, the distance between these two locations must be more than 10 miles than the distance from your home address to the University of Warwick. If this is not the case, then you will be ineligible to claim mileage expenses. If the distance is greater than 10 miles, then you are permitted to claim the mileage expenses, however, this will be the lower mileage of a) Home address to the destination or b) University of Warwick to the destination.
- In all applications for funding, please provide the postcode of where you will be commuting from, as well as the postcode of your destination. For further information, please see FP16.3.3.
- It has been confirmed that PhD students are subject to the revised policy.

Examples:

- Chris lives in Lichfield. He is attending a conference near Wolverhampton. The distance between his home and the conference is 20 miles. The distance between his home and the University of Warwick is 28 miles. As the distance to the conference is not 10 miles more than his commute to the University of Warwick, Chris cannot claim for his mileage.
- Chris now attends a conference near Bedford. The distance between his home and the conference is 87 miles. As this is more than 10 miles compared to the distance between his home and the University of Warwick, he can make a claim to be reimbursed. However, the distance from the University of Warwick to his conference is 61 miles. Therefore, he can only claim 61 miles, not the 87 miles actually travelled.

Key Travel should be considered for all accommodation bookings, however, alternatives may be able to be used where the regulations allow or certain processes are followed.

Accommodation

- Key Travel must* be used for booking all accommodation outside of Europe and for accommodation within the UK and Europe where the trip will exceed £1,000.
- *If the accommodation provided is part of a conference package or is provided by the host university (for example in the case of an OIV) then this is also permitted under the University of Warwick financial regulations.
- Often, Key Travel accommodation is not suitable for longer stays. A FinRegs exemption may be sought, if you do not wish to book through Key Travel: this must be approved before any alternative bookings can be made.

- If not using Key Travel, appropriate due diligence should be undertaken to ensure the accommodation is suitable and meets the University's accommodation standards. Guidance on accommodation requirements is provided in section 9 of the Overseas Travel Process And Guidance at the University of Warwick document. A pre-travel risk assessment is not required for the use of UK-based Airbnb accommodation. However, departments may be asked to confirm that they are satisfied the accommodation meets the relevant requirements. In such cases, an approved risk assessment may be an effective way to demonstrate this assurance.
- If you are travelling overseas, you will be required to complete an Overseas risk assessment, which will include a section on your Accommodation. Please ensure your risk assessment reflects the accommodation requirements found in section 9 of the Overseas Travel Process And Guidance at the University of Warwick document.
- **You must book single-occupancy accommodation**. Where single-occupancy accommodation exists, but you wish to book a double-room, for example, this will require FinRegs approval. If FinRegs approval is not granted, reimbursement will be limited to the cost for equivalent single-occupancy accommodation.
- Please note that there are caps as to the permitted spend per night on accommodation. Please see the current accommodation limits. If costs exceed this, a FinRegs exemption will be necessary.
- If you will be booking your accommodation outside of Key Travel and would like us to investigate making and paying for the booking on your behalf, so that you don't have to pay the costs upfront and then reclaim through Concur, please contact esrcdtp@warwick.ac.uk

You must book accommodation and travel only for that time needed for you to undertake the activity. You may wish to extend the leave for personal use, but this would need to be self-funded and would not be covered by the University's Overseas Business Insurance.

Permitted Travel/Accommodation Dates

- **If you are travelling to a destination which involves you staying, you must book accommodation and travel only for the amount of time that is needed for you to undertake the activity. This applies to all stays regardless of how the visit is funded (e.g. whether it is RTSG funded, or is part of an OIV, OSFW, UKIV or non-academic placement in the UK or abroad).**
- For example, if you are undertaking an Overseas Institutional Visit from Monday 9th February - Friday 27th March. You should arrive on Sunday 8th February and

depart on Saturday 28th March. Accommodation for longer than this will not be funded, unless you can justify why you need to arrive earlier or leave later and this is approved by the MGS DTP.

- If you choose to tag on personal leave onto the start or end of a visit, you will need to book and pay for any additional nights outside of the required dates. If you choose to self-fund extra nights at the destination, in terms of travel, we would need to compare the price of the travel based on when you are now going/returning with the price of what the travel would be if you didn't add on any additional nights. The ESRC funding will pay for the cheaper option of the two and you will be required to pay the difference, if your actual travel is more expensive.

Example:

- A student is undertaking an Overseas Institutional Visit from Monday 9th February - Friday 27th March.
- This student decides to fly out on Saturday 7th February and return on Sunday 29th March.
- The price of the flight is £30 more expensive than had they flown out on Sunday 8th February and returned on Saturday 28th March. The student is therefore required to pay the £30 difference, plus the student will need to pay for their accommodation for the night of 7th February and the night of 28th March.

Getting Set Up on Key Travel

- In order to use Key Travel, you will need to be set up as a 'Trip Holder'.
- To be set up, you will need to complete the Booker Template form (please do not amend columns M-Q). Please ensure that your name matches that of your passport.
- Once completed, please email the form to esrcdtp@warwick.ac.uk
- You will usually be set-up on Key Travel within 5-10 working days of returning the form to us.
- We will let you know when you have been set up on Key Travel as a Trip Holder so you can log in, set a password and access the tutorial on how to use the platform.

Booking Using Key Travel

- Travel and accommodation bookings in the UK and to European countries which are under £1,000 in combined total value do not have to be arranged through Key Travel, though it is strongly recommended that Key Travel is used. Key Travel must be used for **all** overseas travel outside Europe.

- Internal flights, when abroad, should be booked through Key Travel, unless a FinRegs exemption has been granted, or you are going to a European country and the travel and accommodation combined value is below £1,000.
- By using Key Travel, you avoid having to pay your Expenses 'up-front' before reclaiming them back via Concur.
- All students who are currently funded have been asked to follow the process to enable us to set them up as 'Trip Holders' with Key Travel. If you are intending to travel but have not been set up as a Trip Holder yet, please contact us so we can arrange this for you.
- This is the process to follow when you wish to use funding for travel:
    - You (the student) will access the Key Travel Portal to obtain quotes to include with your funding application. You can 'Hold' the quote where possible, although it is unlikely to hold it long enough for you to get all the approvals in place before you can book it.
    - When the application has been approved (and you have all the necessary risk assessments, ethics etc), you will go back into the Key Travel Portal, review the booking and 'share' it with us. You will either:
        - Access the portal and 'share' the original quote sent with us so we can raise the Purchase Order and finalise the booking; or
        - Review any changes the system flags up on the original quote, liaise with us as necessary if there are substantial changes in costs, and 'share' the revised quote with us so we can raise the Purchase Order and finalise the booking; or
        - If the quote has expired, use the online system to create a new one, liaise with us as necessary and then share the new quote with us so we can raise the Purchase Order and finalise the booking.
- If you need to contact Key Travel, you should use the email and telephone numbers specifically set up for Warwick Users. Email **warwick@keytravel.com** **(copying in ESRCdtp@warwick.ac.uk so that we are aware of the request)**; Phone: **0161 819 9812**.
- Please note that if you are trying to book a trip for a country which requires notification to and approval by Warwick's Insurance Office, you will be unable to share the trip via the Key Travel Portal. You will need to take a printscreen of the details of the flight, accommodation etc that you wish to book and email it to us, along with the Insurance Confirmation email and your nationality to ESRCdtp@warwick.ac.uk and ask us to contact Key Travel to book your trip.

Financial Regulations (FinRegs) Exemption Requests

If you wish to do anything which is outside of Warwick's Financial Regulations (typically FP15, FP16 and FP17 are the most relevant to you) or The University Expenses processes, we will need to obtain permission for this from FinRegs and potentially other departments such as Procurement and/or Expenses.

The FinRegs Exemption Request Process

- Please send a Word document to esrcdtp@warwick.ac.uk outlining:

1. A brief description of the context to the request (e.g. what you will be doing and why) and what the FinRegs exemption is for.
2. Why the Warwick approved supplier cannot provide what you need or is unsuitable (with printscreen evidence and/or quotes).
3. If appropriate, other suppliers you have investigated and the reasons for not choosing these. For example, if you are undertaking an OIV or a UK academic placement, you would be expected to investigate staying in the university accommodation of the host institution.
4. Your preferred supplier and the justification for this (with printscreen evidence and/or quotes).

- We will then check your FinRegs request and suggest any changes/improvements. Once this is satisfactory, we will submit the request to FinRegs on your behalf and notify you of the outcome. Please do not contact FinRegs directly, as they will only accept requests from FinReg Champions.
- If your FinRegs is approved, you will need to submit proof of this approval with any Concur claims you make in relation to this item.
- Depending on the complexity of the request, the request may be considered within a few days or could take several weeks. We would therefore recommend requesting the FinRegs approval at the earliest opportunity. We can do this before your application for funding has been approved in some instances.

Risk Assessments, Ethics and Travel Information

In accordance with Warwick and MGS policies, you are likely to need to gain some approvals for your trip/research before incurring any expenses. These approvals will be done through or with the support of your department, and **a copy of the approved documents will need to be sent to esrcdtp@warwick.ac.uk.**

Risk Assessments and Ethics

- A generic guide to the typical requirements is detailed below. Your department will be able to guide you to the correct forms and advise you on the process.
- The Travel Hub and Overseas - Health and Safety are useful sources of information.
- Please note that for 'green' countries, the Warwick policy is that a risk assessment is not required. **However, the MGS policy is that one is required even for 'green' countries.**

Type of Visit	**Forms Required**
Attending conferences, training in the UK	• Please ensure your Supervisor is aware of where you will be and when.
Non-academic placement in the UK UK Institutional Visit	• Travel Risk assessment (please note, required by the MGS even though in the UK) • Placement/Intern Agreement Form (contact the MGS Placements Manager (esrcdtpplacements@warwick.ac.uk) for any queries in relation to this in the first instance, not your department) • Ethics approval, if applicable, from Warwick or host institution (as required)
Attending conferences, training overseas	• Travel Risk assessment (please note, required for green countries as well) • Overseas Travel Declaration Form (please contact your department who will be able to direct you to this)
Non-academic placement overseas Overseas Institutional Visit	• Travel Risk assessment (please note, required for green countries as well) • Overseas Travel Declaration Form (please contact your department who will be able to direct you to this) • Placement/Intern Agreement Form (contact the MGS Placements Manager (esrcdtpplacements@warwick.ac.uk) for any queries in relation to this in the first instance, not your department) • Ethics approval, if applicable, from Warwick or host institution (as required)

UK Fieldwork	• Fieldwork Risk Assessment • Ethics approval (if applicable) • Please ensure your Supervisor is aware of where you will be and when.
Overseas Fieldwork	• Fieldwork Risk Assessment • Ethics approval (if applicable) • Travel Risk assessment • Overseas Travel Declaration Form (please contact your department who will be able to direct you to this)

Overseas Business Travel Insurance and Finance Defined High Risk Country

- Overseas Travel Insurance is available subject to a travel risk assessment being completed and approved and complying with the University's Financial Procedures. For some countries, however, you will need to contact the Insurance Office for approval. You can find more information here: Overseas Business Travel Insurance
- If you are travelling to a Finance defined high risk country listed here: Anti-Money Laundering further guidance (warwick.ac.uk) you must follow the guidance before travel arrangements are confirmed and details will need to be emailed to FinCompliance (please ensure that you or your department cc esrcdtp@warwick.ac.uk).
- Your department will be able to assist you with both procedures. Please ensure that the outcome(s) of this is communicated to esrcdtp@warwick.ac.uk.

Research Activity

You must use Warwick's approved suppliers, unless Procurement/FinRegs approval has been granted to state otherwise. We will need to raise a Purchase Order for the Warwick approved supplier. Even where Procurement/FinRegs approval has been granted to use an alternative supplier, we may have to purchase the item on your behalf, unless there is a reason this is not possible (in which case FinRegs approval would be required for you to pay for the item and be reimbursed).

The below gives some information on some of the types of research activity you might need funding for, but is not an exhaustive list. If your research activity needs funds to be spent on other things, please email esrcdtp@warwick.ac.uk for further advice.

Conferences and Membership Fees

- Subject to your RTSG approval, you may purchase your conferences and training.
- If the upfront cost is a concern to you, please contact esrcdtp@warwick.ac.uk and we can look into organising a Precision Pay payment and booking the conference/training for you. Please allow at least 2-3 weeks for this.
- You can request funding for membership fees where:
    - The actual financial benefits realised (not just available) from membership must be equal to or greater than the cost.
    - Membership is required to attend a conference or present a paper
- Whilst Professional subscriptions are permissible via RTSG, they are not permitted by Warwick unless a FinRegs exemption is granted.

Participant Payments

If you plan to use participant payments, please be aware of the regulations and processes surrounding these.

- Ethics and funding approvals (e.g. RTSG / OSFW applications) must be gained in advance of the research taking place which requires the use of participant payments.
- Participant payments should be made via Edenred vouchers, the University's approved supplier. These are electronic vouchers which recipients can use at a variety of places. To provide the vouchers to the participants, you will need to obtain and share the participants' email addresses with the MGS DTP. If necessary, alternatives such as a paper voucher or providing you with an e-code voucher to pass on to the participant may be possible. However, these two methods will require an extra step of you providing evidence that the vouchers have been received by the participants. The financial regulations specify the monetary limit which can be provided to each participant. Please check with the us find out the current limit, at the time you will be making the payments.
- If the Edenred voucher amount limit is lower than the amount you wish to pay the participants, you will need to apply for FinRegs approval to pay a higher amount per participant. Please email ESRCdtp@warwick.ac.uk justifying why you would like to request a higher amount to be paid for the participants and the number of participant payments you wish to make. We will then ask FinRegs to consider your request.
- If Edenred vouchers are not suitable, please contact ESRCdtp@warwick.ac.uk explaining:

    - why Edenred are not suitable
    - what method of participant payment you would like to use instead
    - the value of the individual participant payments
    - the number of participants
    - how you will evidence receipt of the payments by the receipients
    - how you will demonstrate that this has been paid out of your personal funds
- We will send this information to FinRegs (and Expenses if necessary) to get their approval. FinRegs approval for an alternative form of participant payments is typically only considered for overseas fieldwork. Please note that not all FinRegs applications are approved.
- For any queries about this process, please email: ESRCdtp@warwick.ac.uk

Poster Printing

- You must use Warwick's approved supplier to get your Poster printed, unless FinRegs approval has been granted for you to purchase it from elsewhere.
- Even where FinRegs approval has been granted, we still have to purchase the item on your behalf, unless there is a reason this is not possible (in which case FinRegs approval would be required for you to pay for the item and be reimbursed).

Dictation and Transcription Services

- You must use one of Warwick's approved suppliers for your dictation and/or transcription needs.
- If you wish to use another company or individual this will need complex Procurement, Chief Finance Officer (CFO) and Expenses approvals. In the past, Procurement have advised that as the approved suppliers have gone through the university tendering process which includes ethics standards, code of conducts, insurance cover, Health & Safety etc and have signed the Service Procurement Agreement (SPA) including confidentiality and intellectual clauses, your department would need to consider like for like with the same level of assurances in place as the SPA and forward to their CFO for review and approval prior to any engagement. We would need to see the necessary approvals have been granted before releasing any funding.

Information Technology Hardware/Software (including phones/dictaphones etc)

- Before requesting to purchase any hardware, please see if it is available to loan through AV Services: Borrowing Equipment. Please note that this is for short-term

lending, however, where there is justification and where items are not already booked out, it may be possible for you to book for longer (potentially even several months, if you are going on overseas fieldwork). Please email esrcdtp@warwick.ac.uk confirming what you would like to borrow for roughly how long and justification for why you need it for this length of time. Please also provide the INC number from your booking of the item. We will then request that AV Services allow you to borrow this item for a longer duration.

- Where IT hardware and software cannot be borrowed, it will need to be purchased through the University's approved suppliers.
- IDG approval will be required before some purchases can be made. You or your department should be able to request this approval, please then send this to us, so that we can arrange for the ordering and payment of the item.
- The purchase remains the property of the MGS and you will need to sign paperwork which confirms you are loaning this equipment from the MGS and will return it to the MGS by your Funding End Date or when you have finished using it (whichever is earlier).
- Please note that the MGS will not fund purchases of AI software.
- There is a separate process whereby items are purchased which form part of your DSA Needs Assessment (as this not connected to your research activity).

Off-campus events and catering

- FinRegs approval is required for any off-campus event and for the associated catering.
- Please email your FinRegs exemption request to esrcdtp@warwick.ac.uk. The request will need to include:
    - the business rationale for holding the event off campus
    - the expected number of attendees
    - the catering requirements
    - estimated costs
- We will then check your FinRegs request and suggest any changes/improvements. Once this is satisfactory, we will submit the request to FinRegs on your behalf and notify you of the outcome.
- If your FinRegs is approved, you will need to submit proof of this approval with any Concur claims you make in relation to this item.

- Depending on the complexity of the request, the request may be considered within a few days or could take several weeks. We would therefore recommend requesting the FinRegs approval at the earliest opportunity. We can do this before your application for funding has been approved in some instances.

Claiming Expenses

You can **only** claim expenses once you have had your request for funding approved by the MGS DTP and any other necessary approvals have been granted, see the relevant sections above. There is no guarantee that expenditure incurred before receiving the necessary approvals will be reimbursed.

Expenses Which Can Be Claimed

- **All expenditure must be in accordance with the University of Warwick's Financial Regulations and Expenses policies. The sections above will help you to understand some of these requirements. If you are unsure, please contact esrcdtp@warwick.ac.uk in the first instance.**
- You should only use expense claims for reimbursement of travel, accommodation, visa costs and conference/membership fees, unless you have FinRegs exemption approvals.
- A FinRegs approval must be attached to every claim, which has a FinRegs exemption. These may be needed for some travel and accommodation.
- Other goods and services must be ordered through University approved suppliers and using the University purchasing procedures. The DTP Office will be able to advise on how to do this.
- All expenditure must have been given funding approval and have any other necessary approvals (e.g. risk assessments, ethics approvals, FinRegs approvals etc) prior to the expense being incurred.
- Please ensure that you **submit all expense claims within 3 months of incurring the cost**.
- After your claim has been approved by the Central Expenses Team you will receive an email with Payment Status of "Sent for Payment". Claims with status "Sent for Payment" by Wednesday afternoon will then be included in the next weekly BACS run, which is usually processed on a Thursday morning and funds credited the following Monday (subject to alteration re Bank Holidays, Christmas and Financial Year-end).

If You Are Set Up On Concur

- To submit your claim(s) please access Concur by logging into the University's home page and typing 'Concur' into the Search box.
- Click the first result that pops out. This will take you to the Concur landing page.
- Please see the guidance on using Concur. If you are staying in accommodation for more than one night, it is important that you itemise the stay over the duration of your stay. See the training video 'Adding a hotel stay' for instructions on how to do this (other training videos are also included in the same link).
- You must submit an **itemised receipt** for each expense you are claiming (apart from mileage). Credit card receipts alone are **not acceptable**. We cannot process any expenses where an itemised receipt is not available. The receipt must confirm that payment has been received.
- Remember to include the FinRegs approval where appropriate.
- In the 'Business Purpose Field', you must use this field to describe specifically why you incurred this expense; where you went, why and when. Your claim will be returned, and reimbursement delayed if it is not completed correctly. Do not use the Comments field for this information or merely replicate the expense type or give general information such as "University Business". Your entry in the Business Purpose box should be formatted as follows: Type of expense – Reason/location – date e.g. RTSG – Edinburgh Conference – 5-7/01/27
- The University is charged for each claim made in Concur, please group claims together and submit separate claims no more often than once a month.
- You should use form FP16aPhD if your bank details change. If you need to do so, you will need to enter your University vendor number on the form (this begins with '300.....') which will have been sent to you with the 'University Of Warwick – BACS Remittance Note' for your first claim. The Vendor number is titled 'Account Number' on the form and is listed on the top right-hand corner of the form.

If You Are Not Set Up On Concur

- The FP16aPhD expenses form must be completed the first time you claim reimbursement. Once you have completed this form you will be set up on Concur. Future claims should go through Concur, unless you change your bank account details in which case a new FP16aPhD expenses form will need to be completed.
- The FP16aPhD expenses forms must be accompanied by **original itemised receipts** (credit/debit card receipts with no detail of type of purchase are not acceptable)**,** otherwise your claim will be rejected by the Expenses team. Expenses offer FP16APhD in different formats, **please use the excel version whenever possible**.