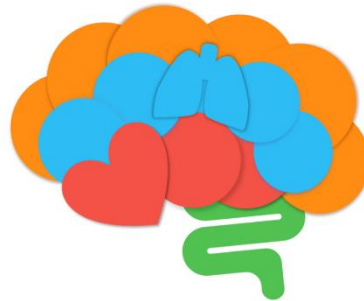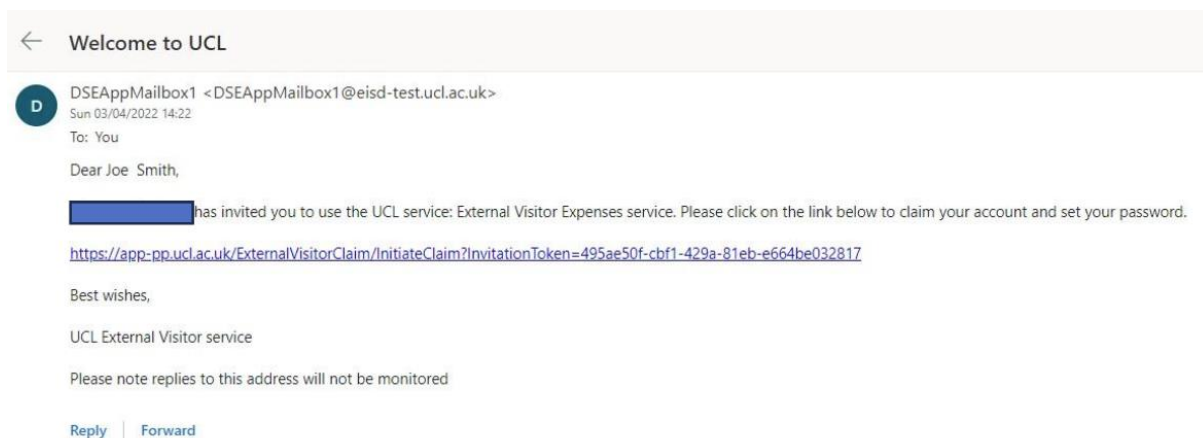# VISITOR/PARTICIPANT EXPENSE GUIDE

<u>Receiving invitation from UCL and activating account</u>

1. At the end of a testing session, a member of the research team will invite you to use the expenses service, and you will receive an email with a link to register. Click the link:

2. The screen below appears: enter your name, create a password, agree to Ts&Cs and click **Submit**:

3. The message below will appear when submitted:
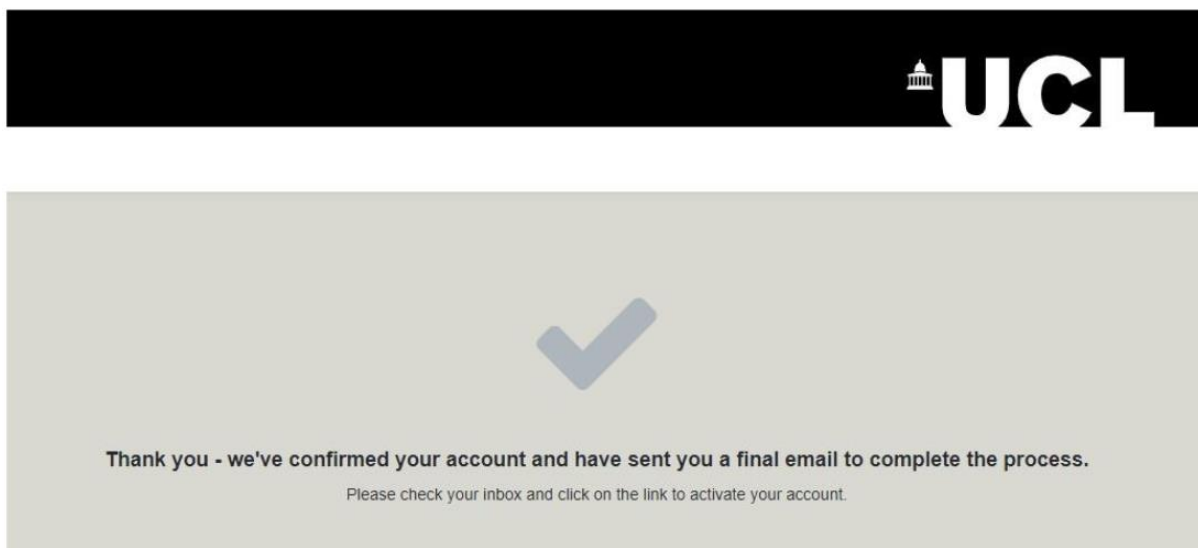
4. Go to your email inbox. The email below will appear. Click on the link to activate the account:

DSEAppMailbox1 <DSEAppMailbox1@eisd-test.ucl.ac.uk>
Mon 04/04/2022 11:47
To: You

Dear Joe Smith,

Thank you for claiming your UCL account - you're almost there! Please click on the link below within the next hour to complete the process and activate your account.

https://app-pp.ucl.ac.uk/ExternalVisitorClaim/CompleteClaim?ClaimToken=22d035be-db1f-4ce8-91f3-202cbe42806c

Best wishes,

UCL External Visitor service

Please note replies to this address will not be monitored

Reply | Forward

5. When activated the message below will appear:

Great news! Your account creation was successful.

We've sent you an email with details of how to log into the service you've been granted access to.
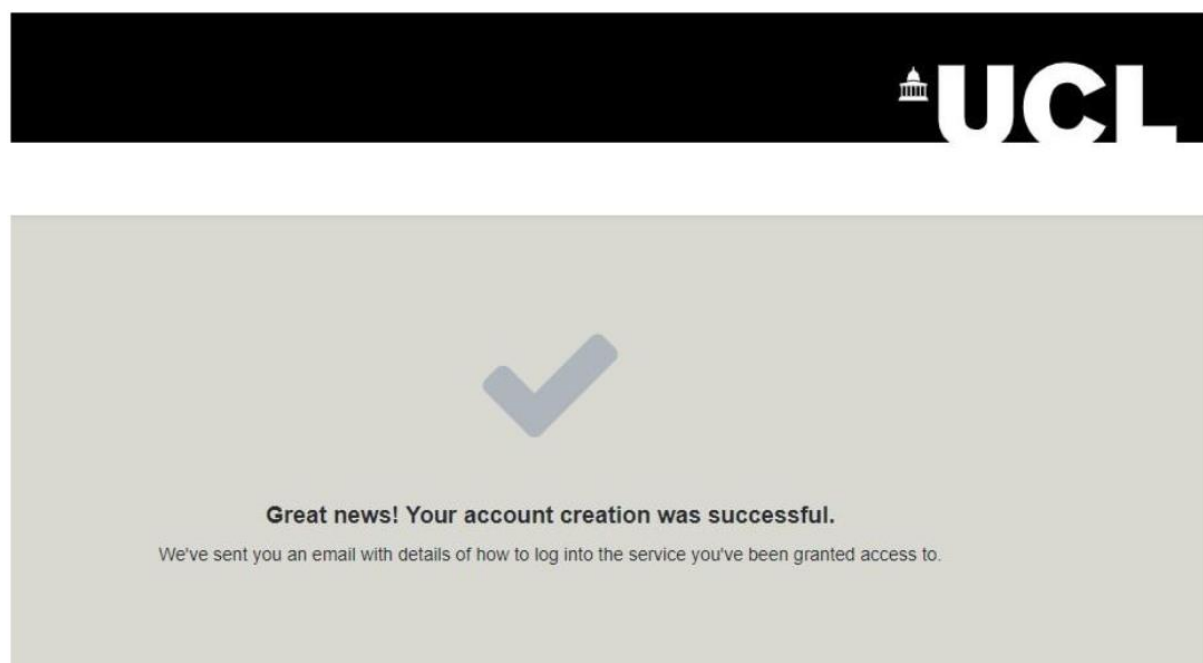
Registering bank details and making a claim

6. Once your account is activated, an email is sent to your email address. Click on the link to access the External Visitor Service:

DSEAppMailbox1 <DSEAppMailbox1@eisd-test.ucl.ac.uk>
Mon 04/04/2022 11:48
To: You

Dear Joe Smith,

Your UCL visitor account has been successfully activated. For instructions on how to access the UCL service: External Visitor Expenses service, please follow the link below:

https://app-pp.ucl.ac.uk/ExternalVisitorExpenses

You can find the privacy policy for the service here:

If you need to change your password, please visit https://app-pp.ucl.ac.uk/ExternalVisitorManagement/PasswordResetRequest.

Best wishes,

UCL External Visitor service

Please note replies to this address will not be monitored

Reply | Forward

7. Log into the service using the email address and password used during the account activation process:

Home / Single Sign-on

Single Sign-on

UCL members: in order to access this resource, please enter your UCL computer account details in the boxes below and click "Login".

UCL username: *

UCL password: *

Login

- You will only need to enter these details once per Web browser session.
- **Remember:** to properly log out of any resource, you should always end your web browser session.

8. Complete the address fields and click **Next:**

9. Enter your bank account details and click **Save**. Please double check the bank details before saving to ensure correct and if an overseas bank account, ensure that BIC/SWIFT, IBAN codes etc are in the correct format:

10. The expense claim area will appear. Enter the claim description, e.g. "Participating in research study", then tick the declaration and click **Save**:

11. The Edit expense claim area will appear. Upload a receipt file – this will be given to you on the day of participation ("Research Participant Payment Form").

Note: Only one file can be uploaded with all the receipt images in one file. Therefore, if you have multiple receipts/files, please take a photo of all the receipts and upload, or combine files into one PDF – maximum size 3.9MB. Guides on how to do this are available on the internet:

Edit expense claim

Claim summary   ⌄

Receipts   ⌃

Please combine your receipts into one JPG or PDF file ▬▬▬▬▬▬ See our guide on how to create a single PDF from multiple files.

Upload receipt

Claim items   ⌃

Add a claim item for each individual receipt. Do not combine receipts into a single claim item.

Add claim item

Date ⇕	Type ⇕	Justification ⇕	Amount ⇕

You have not added any items yet.

Total: £0.00

Claim summary   ⌄

Receipts   ⌃

Please combine your receipts into one JPG or PDF file (max size limit 7.5MB). See our guide on how to create a single PDF from multiple files.

RECEIPT FOR TESTING

Delete receipt   **Change receipt**

12. Enter the claim lines by clicking **Add claim item**. Please add one claim line per receipt:

Claim items

Add a claim item for each individual receipt. Do not combine receipts into a single claim item.

Add claim item

Date ⇕	Type ⇕	Justification ⇕	Amount ⇕

You have not added any items yet.

Total: £0.00

13. Enter new claim item details, click **Save**:

UCL External Visitor Expenses   Home   My addresses   My bank details   My expense claims   Joe Smith   Log out

New claim item

Expense type: *

Airfare - Europe

Date: *

dd/mm/yyyy

Back   Save

14. When all claim receipt items have been added, click **Send claim for approval**:

Claim items

Add a claim item for each individual receipt. Do not combine receipts into a single claim item.

Add claim item

Date ⇕	Type ⇕	Justification ⇕	Amount ⇕		
01 Mar 2022	Airfare - Europe	Travel to UCL	€248.00 (£205.84)	Edit	Delete

1 to 1 of 1 items

Total: £205.84

Send claim for approval

The process now goes back to UCL to accept and process the claim. If you have any questions, please email icn.embody@ucl.ac.uk