

External Examiner Payroll Claim Form

Training Guide

Digital Programme & Innovation Office (DPIO)

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Introduction

This guide will show you how to submit an External Examiner claim form. You will need to register on the Digital Claimant Portal before you can sign in and submit a form.

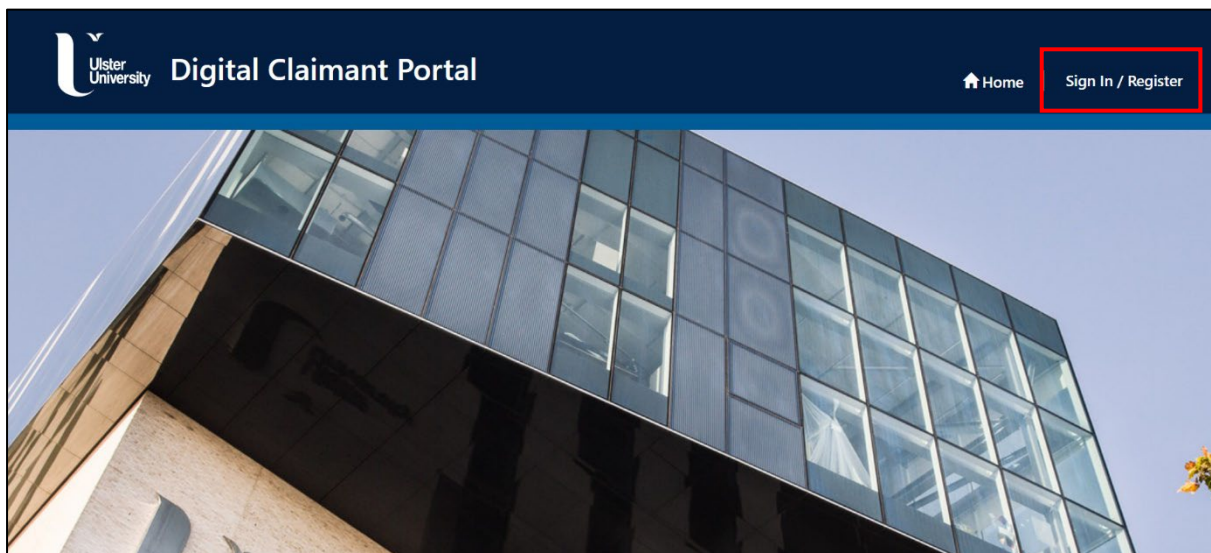
There is a link to the **Portal Registration Guide** for External Claimants on the Claimant Portal.

To access the Digital Claimant Portal, click the link on the Finance Visitors page: [Finance Information for Visitors](#)

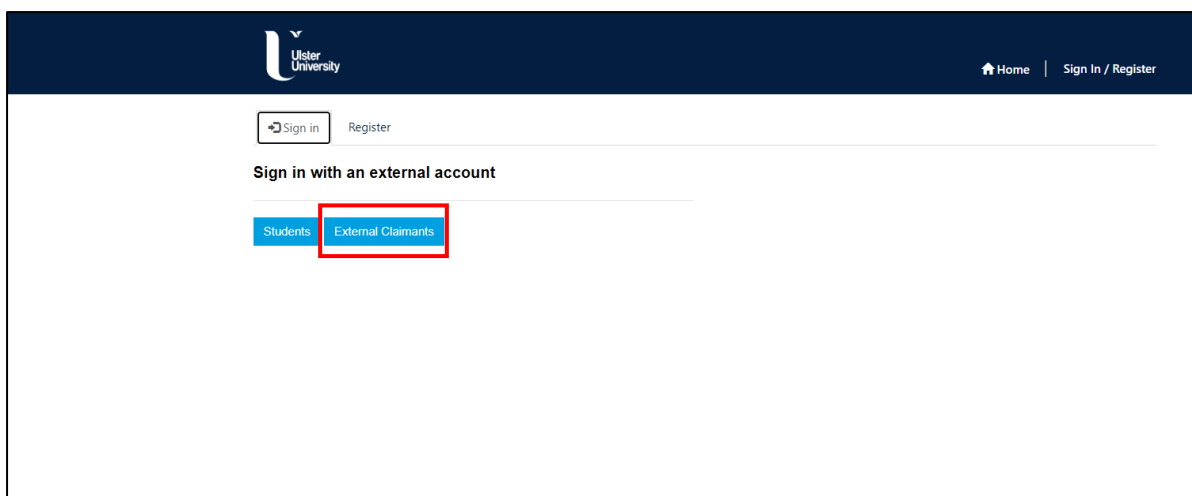
1. Submit an External Examiner Payroll Claim

1.1 Log into the Digital Claimant Portal

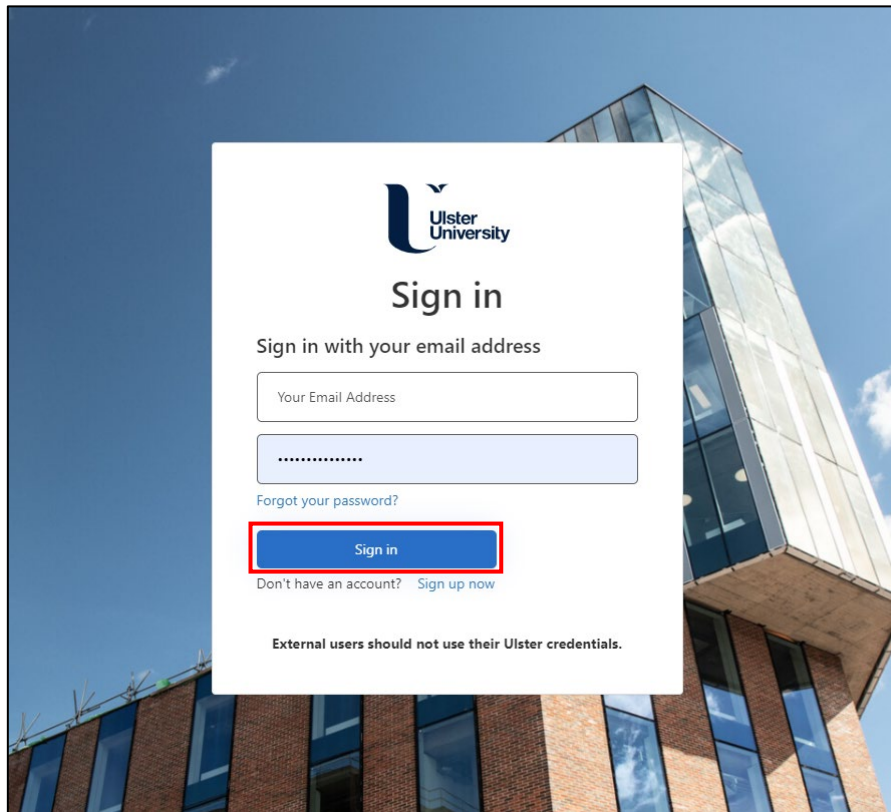
1. Open the Digital Claimant Portal and click **Sign In / Register**



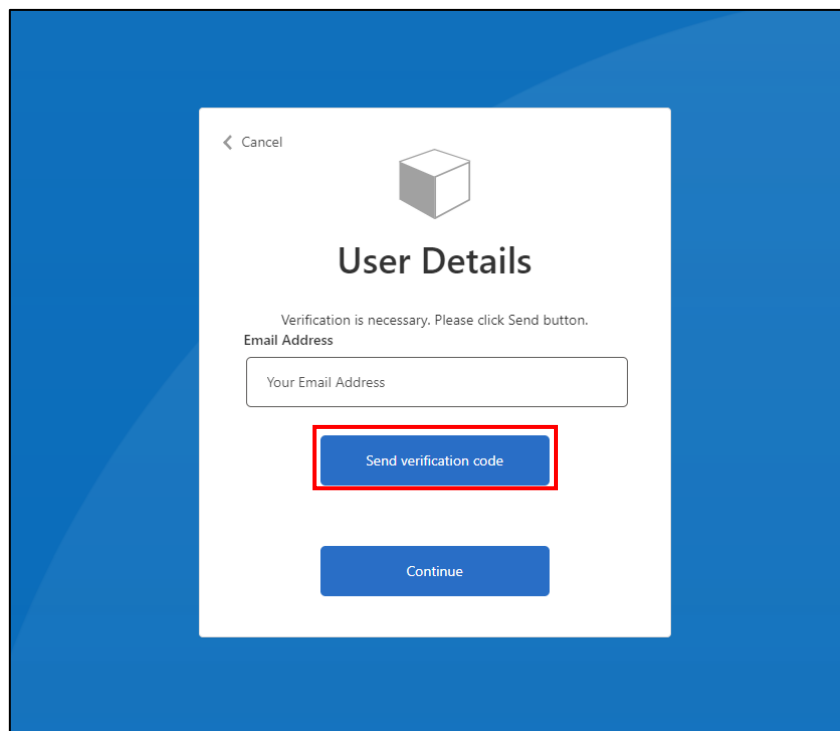
2. Click **Sign in > External Claimants**



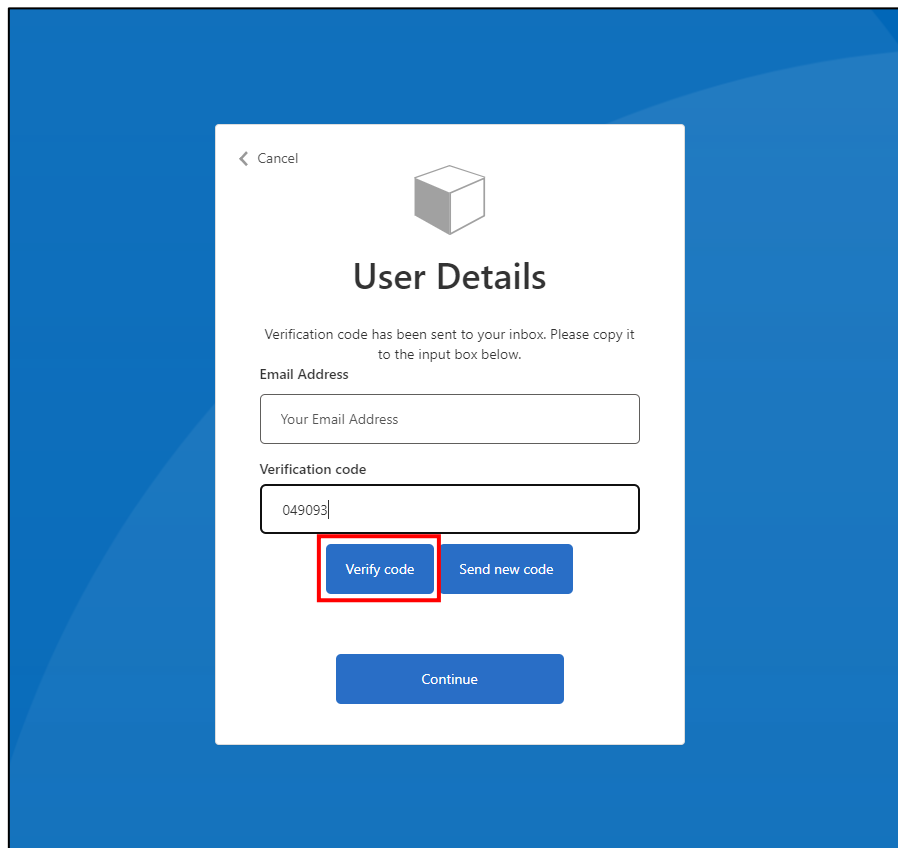
3. Enter your email address and password and click **Sign in**
Please note: enter a personal email address, not your Ulster credentials



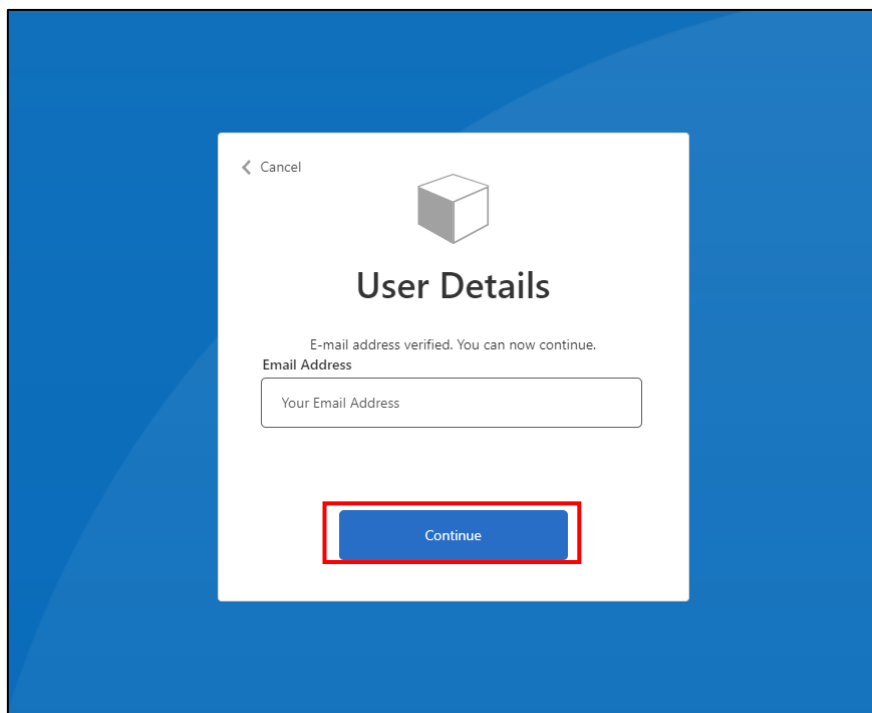
4. Click **Send verification code** button



5. Enter the verification code sent to your email inbox
6. Click **Verify code**

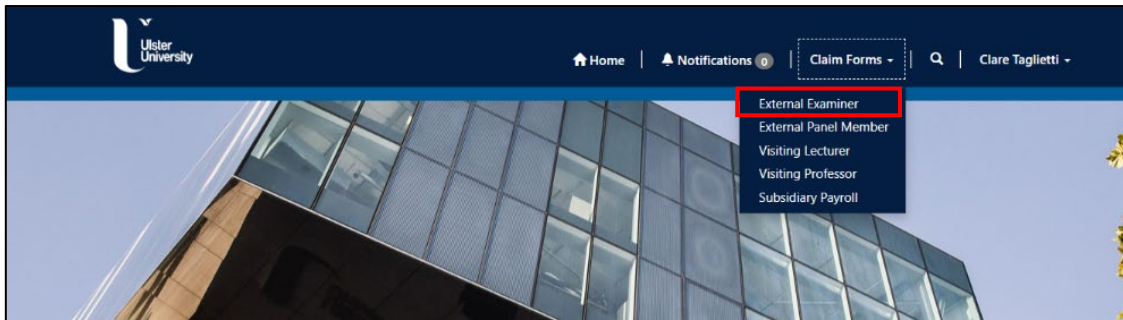


7. Click **Continue** to log into your account

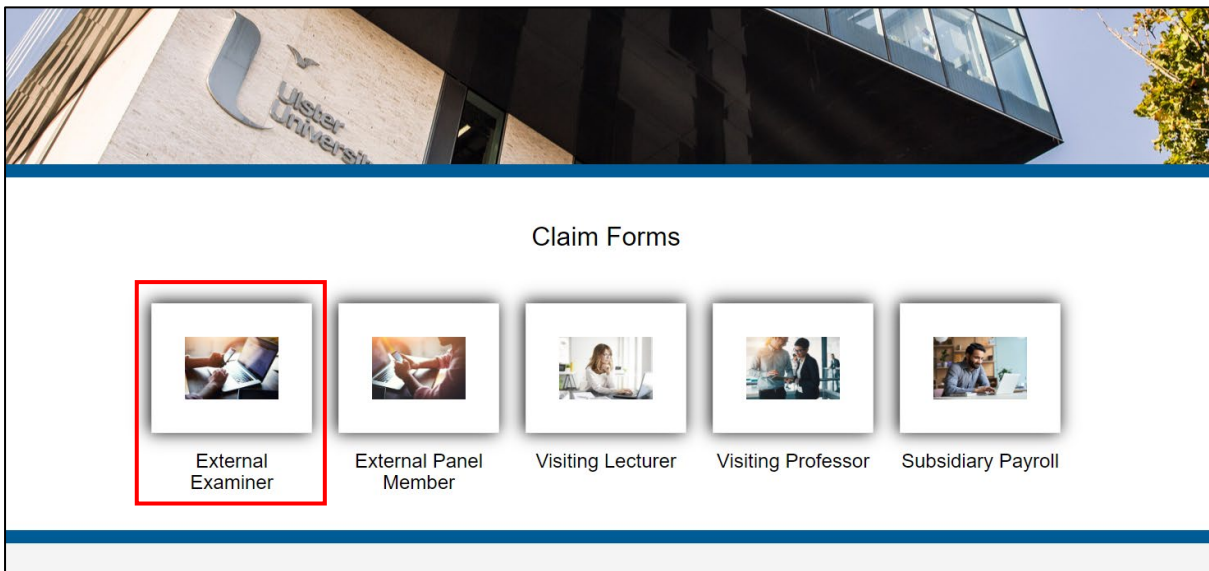


1.2 Open a new External Examiner claim form

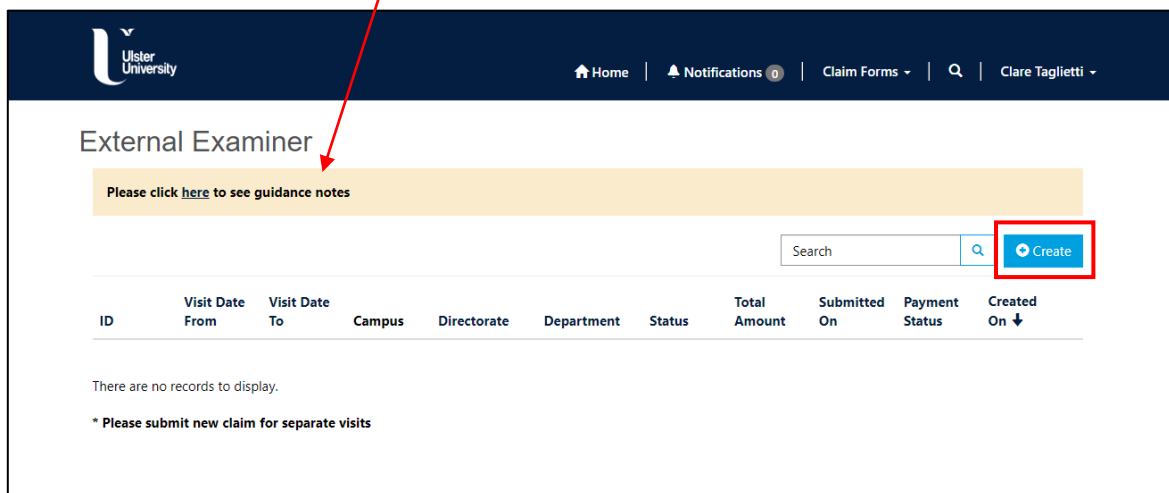
1. There are two ways to select the claim form you require:
 - Option 1: Click **Claim Forms > External Examiner**



- Option 2: Scroll down and click the **External Examiner** icon



2. Click the **+Create** button to start a new claim
(Click here to view guidance notes)



1.3 Complete the External Examiner claim form

The form is pre-populated with the details in your personal profile.

1 Personal Details	2 Visit Details	3 Claim Request Lines	4 Documents	5 Confirmation
Claim Type External Examiner				
Personal Details				
Title * Ms				
First Name * Clare		Last Name * Taglietti		
Date of Birth * 27-03-1982		Mobile Phone Provide a telephone number		
Address Line 1 * 26 Belfast Street		Address Line 2 —		
Address Line 3 —		Address Line 4 —		
Town * Belfast		County/State * Antrim		

If your personal details are incorrect, you can update your profile. **Please note:** you cannot edit your bank details or your UK Taxpayer status in your profile after you click Submit. If these details have changed, email: subsid-payroll@ulster.ac.uk

1. Click **Next** if you are happy to proceed

Are you a registered UK Taxpayer? *	
<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes
National Insurance Number JN123456B	
BANK ACCOUNTS	
Please select which of these describes your Bank Account	
<input checked="" type="checkbox"/> UK	<input type="checkbox"/> Non UK
Bank Name Santander	
Sort Code 123456	Account Number 23456789
<p>*If any of your personal information is incorrect, please click here to update your profile. If your bank details or your UK Taxpayer status have changed please email subsid-payroll@ulster.ac.uk</p>	
Back to List	Next

2. Select the **Campus** (multiple campuses can be selected) from the dropdown list (click out of the box to complete selection)
3. Click the lookup button and the relevant checkbox to choose the **Faculty** and click **Select**
4. Click the lookup button and the relevant checkbox to choose the **School** and click **Select** (only the Schools attached to the Faculty will appear in the list)
5. Enter the **Course** details
6. Select the **Year/Group** from the dropdown box
7. Enter the **Visit Date From**, and the **Visit Date To**
8. Click **Next**

1 Personal Details ✓ 2 Visit Details 3 Claim Request Lines 4 Documents 5 Confirmation

Claim Type
External Examiner

Campus *
BT-Belfast ×

Faculty *
3004 - Arts Humanities Social Science × 🔍

School *
4006 - Arts and Humanities × 🔍

Course *
Arts and Humanities

Year/Group *
Year 3

Visit Date From *
05-12-2022

Visit Date To *
07-12-2022

Please click [here](#) to see guidance notes

Back to List Previous **Next**

9. Select **Fee** from the dropdown list and click the **+Create** button

1 Personal Details ✓ 2 Visit Details ✓ 3 Claim Request Lines 4 Documents 5 Confirmation

Claim Type *
External Examiner

Please select cost type to create line items: Fee ▾ +Create

Ref Number ↑	Category	Cost Type	Hours Worked/Mileage	Rate Per Unit	Fee	Expense	Total Amount
There are no records to display.							

10. The **Create** box will open. Enter the fee agreed with the Faculty.

11. Click **Submit**

Create

Category *
External Examiner Fee

Claim Commentary

Total £ Value
£ 650.00

Submit

See the **Fee** claim request line below

1 Personal Details ✓ 2 Visit Details ✓ 3 Claim Request Lines 4 Documents 5 Confirmation

Claim Type *
External Examiner

Please select cost type to create line items. Expense(s) + Create

Ref Number ↑	Category	Cost Type	Hours Worked/Mileage	Rate Per Unit	Fee	Expense	Total Amount
EE-01439-1	External Examiner Fee	Fee			£650.00		£650.00

12. Select **Expense(s)** from the dropdown list and click the **+Create** button (multiple claims for Accommodation, Travel etc. can be added)

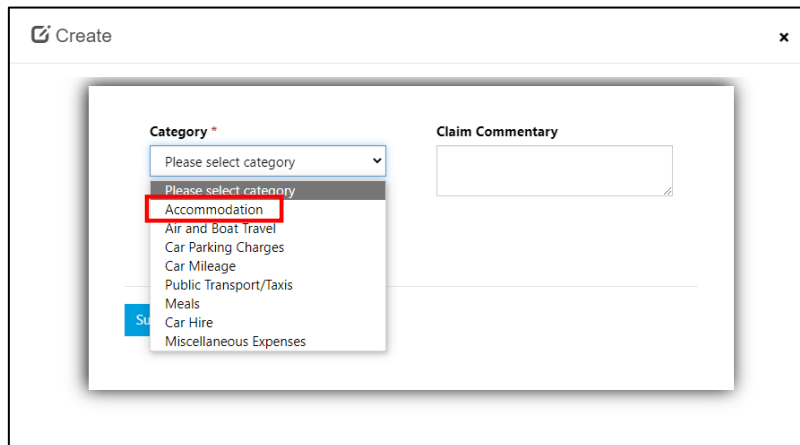
1 Personal Details ✓ 2 Visit Details ✓ 3 Claim Request Lines 4 Documents 5 Confirmation

Claim Type *
External Examiner

Please select cost type to create line items. Expense(s) + Create

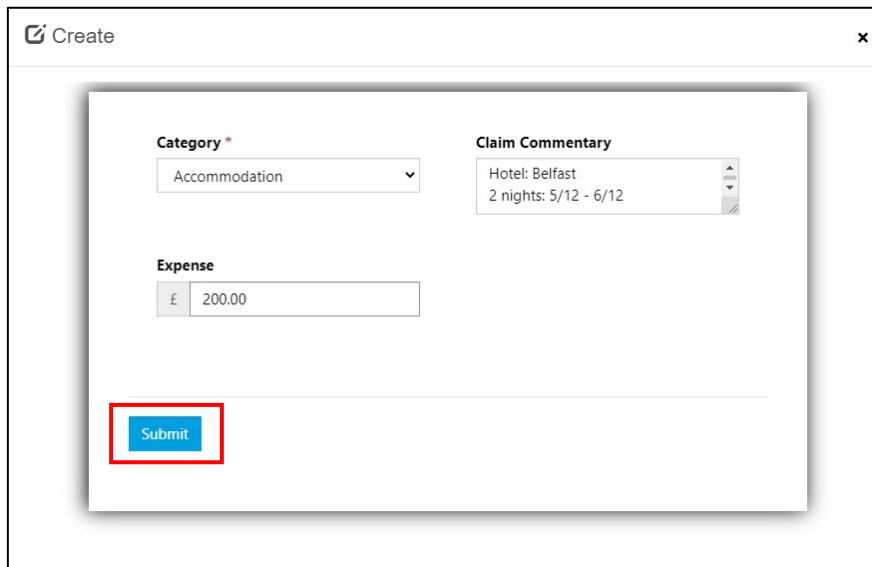
Ref Number ↑	Category	Cost Type	Hours Worked/Mileage	Rate Per Unit	Fee	Expense	Total Amount
EE-01439-1	External Examiner Fee	Fee			£650.00		£650.00

13. In the **Create** box select a Category from the dropdown list



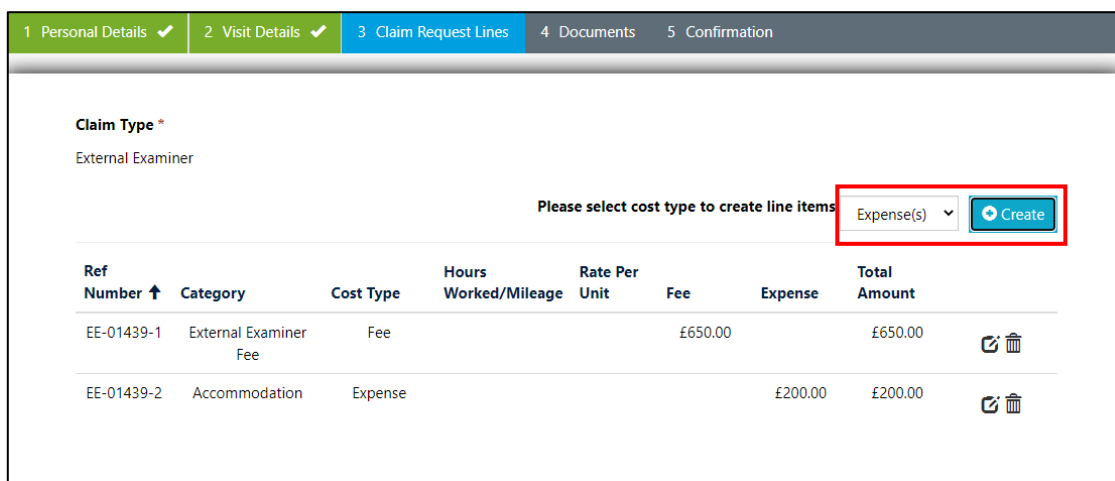
The screenshot shows a 'Create' dialog box with a 'Category' dropdown menu open. The dropdown list includes the following options: 'Please select category', 'Accommodation', 'Air and Boat Travel', 'Car Parking Charges', 'Car Mileage', 'Public Transport/Taxis', 'Meals', 'Car Hire', and 'Miscellaneous Expenses'. The 'Accommodation' option is highlighted with a red box. To the right of the dropdown is a 'Claim Commentary' text area.

14. Enter the Accommodation details. In the **Claim Commentary** box provide information the reviewer would find helpful and click **Submit**







The screenshot shows the 'Create' dialog box with the following details: 'Category' is set to 'Accommodation', 'Claim Commentary' contains 'Hotel: Belfast' and '2 nights: 5/12 - 6/12', and 'Expense' is set to '£ 200.00'. The 'Submit' button is highlighted with a red box.

15. Click the **+Create** button to add a second Expense claim



The screenshot shows the 'Claim Request Lines' step in a multi-step process. The 'Claim Type' is 'External Examiner'. The 'Please select cost type to create line items' dropdown is set to 'Expense(s)' and the '+Create' button is highlighted with a red box.

Ref Number ↑	Category	Cost Type	Hours Worked/Mileage	Rate Per Unit	Fee	Expense	Total Amount	
EE-01439-1	External Examiner Fee	Fee			£650.00		£650.00	 
EE-01439-2	Accommodation	Expense				£200.00	£200.00	 

16. Select a Category from the dropdown list, enter the details and click **Submit**

Category *
Public Transport/Taxis

Claim Commentary
Return Train Fare: Coleraine to Belfast

Expense
£ 48.00

Submit

17. Select another Category, enter the details and include further information in the **Claim Commentary** box. Click **Submit**

Category *
Meals

Claim Commentary
2 x evening meal

Expense
£ 80.00

Submit

See the list of **Expense** claim request lines below

1 Personal Details ✓ 2 Visit Details ✓ 3 Claim Request Lines 4 Documents 5 Confirmation

Claim Type *
External Examiner

Please select cost type to create line items. Expense(s) **Create**

Ref Number ↑	Category	Cost Type	Hours Worked/Mileage	Rate Per Unit	Fee	Expense	Total Amount
EE-01439-1	External Examiner	Fee			£650.00		£650.00
EE-01439-2	Accommodation	Expense				£200.00	£200.00
EE-01439-3	Public Transport/Taxis	Expense				£48.00	£48.00
EE-01439-4	Meals	Expense				£80.00	£80.00

Please note: Claim Request Lines can be edited or deleted before submission by clicking the **Edit** or **Deactivate** buttons next to the claim line.

1 Personal Details ✓ 2 Visit Details ✓ 3 Claim Request Lines 4 Documents 5 Confirmation

Claim Type *
External Examiner

Please select cost type to create line items. Expense(s)

Ref Number ↑	Category	Cost Type	Hours Worked/Mileage	Rate Per Unit	Fee	Expense	Total Amount
EE-01439-1	External Examiner Fee	Fee			£650.00		£650.00
EE-01439-2	Accommodation	Expense				£200.00	£200.00
EE-01439-3	Public Transport/Taxis	Expense				£48.00	£48.00
EE-01439-4	Meals	Expense				£80.00	£80.00

Please click [here](#) to see guidance notes

18. Click **Next** when you have entered all the claim details.

19. In the **Documents** tab click the **Edit** buttons to upload documents

Please note: the **Required** column denotes documents that are mandatory or recommended. Providing the recommended documents will help the processing of your claim.

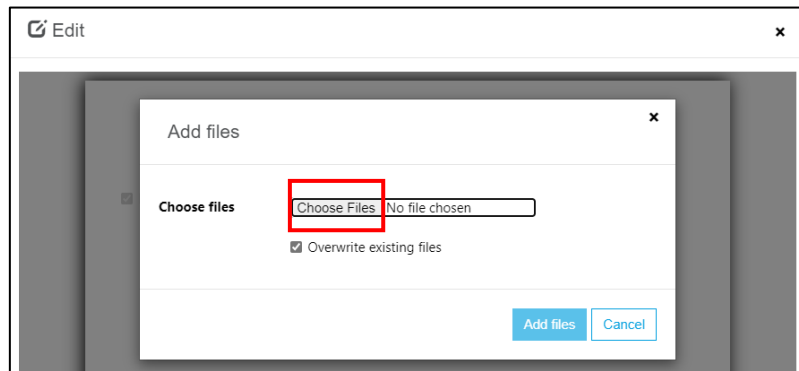
1 Personal Details ✓ 2 Visit Details ✓ 3 Claim Request Lines ✓ 4 Documents 5 Confirmation

Info! Providing recommended documents will allow us to process your claim in a more timely manner, if any documents are not received we may need to reach out to gain these.

Claim Type *
External Examiner

Document Setting ↑	Required	Uploaded
Expense Receipts	Mandatory	No
Right to work document(s) - Passport Copy or Other	Recommended	No
Starter Declaration or Valid P45	Mandatory	No

20. To add Expense Receipts click **Add files > Choose Files**

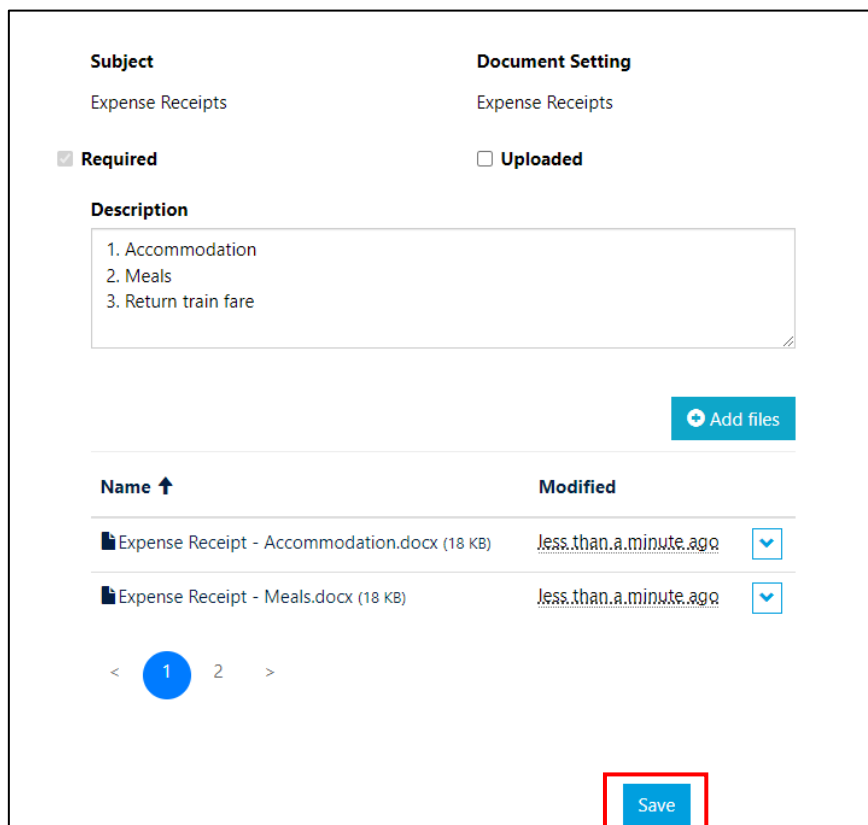






21. Browse for a file, click **Add files**, and repeat to add another file. Multiple files can be selected and added at the same time.

Please note: Receipts must be provided for all expense claims except Car Mileage. Please ensure the filenames of the receipts match the expense you are claiming (e.g., Accommodation, Rail Fare, Car Parking etc).

For missing receipts please upload an explanation or email from the School approving payment without receipt.

22. Enter Expense Receipt details in the Description box if you have multiple receipts and click **Save**. (If saving all your receipts as a single PDF ensure they are individually listed in the Description box)



Name ↑	Modified
 Expense Receipt - Accommodation.docx (18 KB)	less than a minute ago 
 Expense Receipt - Meals.docx (18 KB)	less than a minute ago 

Please note: there is a 'Delete' option if you upload the wrong file

The screenshot shows a document management interface. At the top, there are two columns: 'Subject' and 'Document Setting', both containing 'Expense Receipts'. Below this, there are two checkboxes: 'Required' (checked) and 'Uploaded' (unchecked). A 'Description' field contains the text 'Hotel Accommodation'. A blue 'Add files' button is located below the description field. At the bottom, there is a table with columns 'Name' and 'Modified'. The table contains one entry: 'Expense Receipt - Accommodation.docx (18 KB)' with a modification time of 'about a minute ago'. A red box highlights a 'Delete' button next to the file name.

Please note: upload a Passport Copy if a copy of your current passport is not held on file at the receiving School.

23. To add Right to work document(s) – Passport Copy click **Add files > Choose Files**

24. Browse for a file, click **Add files**.

25. Click **Save**

Please note: never email a copy of your passport to the Payroll Team.

The screenshot shows a document management interface. At the top, there are two columns: 'Subject' and 'Document Setting', both containing 'Right to work document(s) - Passport Copy'. Below this, there are two checkboxes: 'Required' (unchecked) and 'Uploaded' (unchecked). A 'Description' field contains the text 'Passport copy'. A blue 'Add files' button is located below the description field. At the bottom, there is a table with columns 'Name' and 'Modified'. The table contains one entry: 'Passport.docx (18 KB)' with a modification time of 'less than a minute ago'. A red box highlights a 'Save' button at the bottom center of the interface.

26. To add a Starter Declaration or Valid P45 click **Add files > Choose Files**

27. Browse for a file, click **Add files**

28. Click **Save**

Subject
Starter Declaration or Valid P45

Document Setting
Starter Declaration or Valid P45

Required **Uploaded**

Description
P45

[Add files](#)

Name ↑	Modified
Starter Declaration or Valid P45.docx (18 KB)	less than a minute ago

[Save](#)

29. Click **Next** when the documents have been uploaded

1 Personal Details ✓ **2** Visit Details ✓ **3** Claim Request Lines ✓ **4** Documents **5** Confirmation

Info! Providing recommended documents will allow us to process your claim in a more timely manner, if any documents are not received we may need to reach out to gain these.

Claim Type *
External Examiner

Document Setting ↑	Required	Uploaded	
Expense Receipts	Mandatory	Yes	
Right to work document(s) - Passport Copy or Other	Recommended	Yes	
Starter Declaration or Valid P45	Mandatory	Yes	

Please click [here](#) to see guidance notes

[Back to List](#) [Previous](#) [Next](#)

30. Click the Checkbox to certify the details are correct and click **Submit**

1 Personal Details ✓
2 Visit Details ✓
3 Claim Request Lines ✓
4 Documents ✓
5 Confirmation

Claim Type
External Examiner

Name
EE-01439

Total Mileage
0.00

Total Fee	Total Expense
£650.00	£338.00

Total Amount
£988.00

I certify that the expenditure detailed above was incurred, solely on behalf of the Ulster University and that expenses claimed were actually and necessarily incurred in the performance of my duties *

Please click [here](#) to see guidance notes

Back to List
Previous
Submit

31. After you have completed and submitted a claim click the **Back to List** button to view a list of your claims

Please note: your claims can also be accessed by clicking the relevant form in the **Claim Forms** dropdown list.

ID – the unique reference assigned to your claim

Status – submitted, resubmitted, draft

Payment Status – this will update once your claim has progressed

Home | Notifications 0 | Claim Forms | Search | Clare Taglietti

External Examiner

Please click [here](#) to see guidance notes

Q Create

ID	Visit Date From	Visit Date To	Campus	Directorate	Department	Status	Total Amount	Submitted On	Payment Status	Created On
EE-01439	05-12-2022	07-12-2022	BT-Belfast	3004 - Arts Humanities Social Science	4006 - Arts and Humanities	Submitted	£988.00	15-12-2022 3:43 PM		15-12-2022 11:01 AM

* Please submit new claim for separate visits

Please note: if you are not ready to submit a claim it can be left in Draft mode. Click the **Edit** button to complete the form, or the **Deactivate** button to delete the claim.

External Examiner

Please click [here](#) to see guidance notes

Search

ID	Visit Date From	Visit Date To	Campus	Directorate	Department	Status	Total Amount	Submitted On	Payment Status	Created On ↓
EE-01442	05-12-2022	07-12-2022	BT-Belfast	3004 - Arts Humanities Social Science	4006 - Arts and Humanities	Draft	£0.00			16-12-2022 3:26 PM
EE-01439	05-12-2022	07-12-2022	BT-Belfast	3004 - Arts Humanities Social Science	4006 - Arts and Humanities	Submitted	£988.00	15-12-2022 3:43 PM		15-12-2022 11:01 AM

* Please submit new claim for separate visits

32. Click your name on the toolbar and click **Sign out** to log out of the Payroll Claims Portal

Claim Forms | Search | Clare Taglietti

- Profile
- Sign out

2. Digital Claimant Portal Notifications

You may receive an email notification about your claim if action is required, for example, you may be asked to upload a document to support your claim.

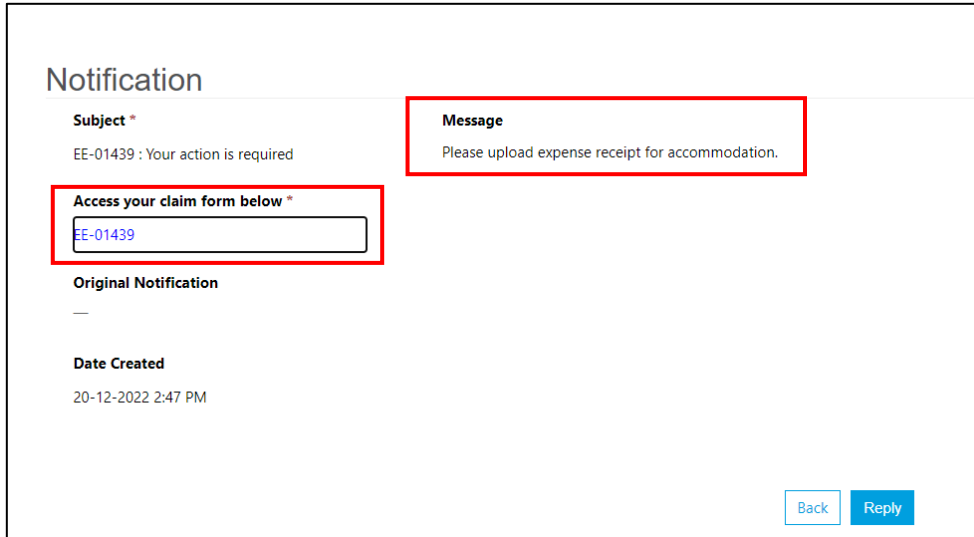
1. Log into the Digital Claimant Portal and click the **Notifications** button to open the **Portal Inbox**

Home | Notifications 1 | Claim Forms | Search

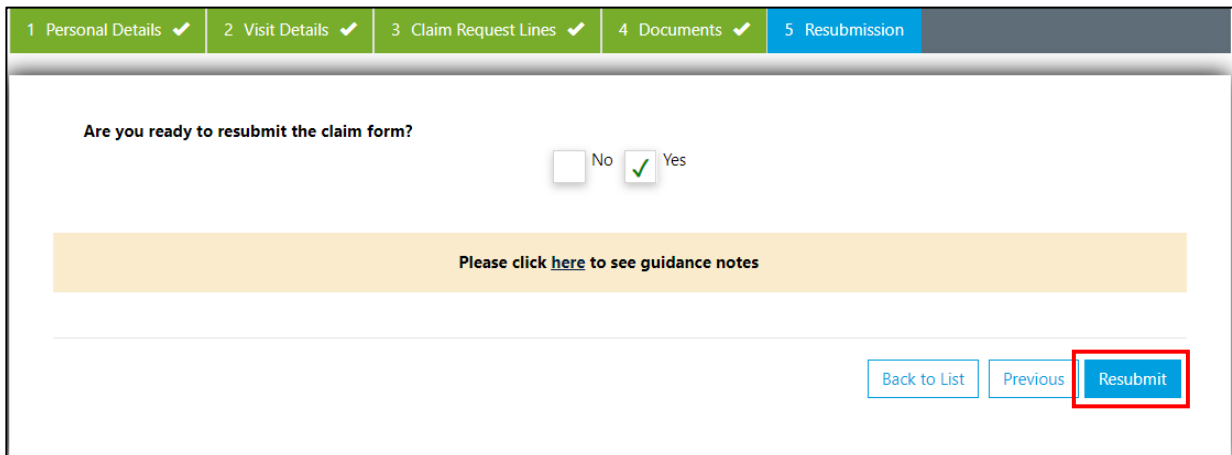
2. Select the **Claim Form** or click on the **information** button to view the notification details



3. Click the link (see below) to access the claim form and complete the request



4. When the form opens click **Next** through the form pages to reach the **Documents** page
5. Upload the requested document and click **Next**
6. If you are not ready to resubmit the form and would like to return to it later, select **No** and click **Save For Later**
7. If you are ready to resubmit the claim form, select **Yes** and click **Resubmit**



Please Note: if you click **Claim Forms > External Examiner** you will see the **Status** of the form has changed to **Resubmitted**

8. In the **Portal Inbox** open the notification and click the **Reply** button to notify the claim reviewer the requested action is complete

9. Enter details (**Subject** field is mandatory) and click **Submit**

Reply

Subject *
Expense receipt request

Message
Requested document uploaded.

Submit

After you submit your reply, you are directed back to the **Portal Inbox**

Claim Form	Subject	Portal Inbox Status	Is Read	Date Created ↓	
EE-01439	Expense receipt request	Sent	Yes	20-12-2022 2:59 PM	
EE-01439	EE-01439 : Your action is required	Received	Yes	20-12-2022 2:47 PM	

10. Click the **Claim Form** or the **information** button to view your message

Notification

Subject *
Expense receipt request

Message
Requested expense receipt uploaded.

Access your claim form below *
[EE-01439](#)

Original Notification
EE-01439 : Your action is required

Date Created
20-12-2022 2:59 PM

Help & Support

Links to claim form guidance and training documentation (PDF guides) are available on the **Portal Home** screen.

If you experience any technical difficulties, you can contact the IT Service Desk by clicking the **UniDesk IT Service Desk** tile on the Ulster Portal and selecting **New call**.

You can also access the UniDesk Self Service Portal by clicking on the link below:

[UniDesk Self Service](#)