



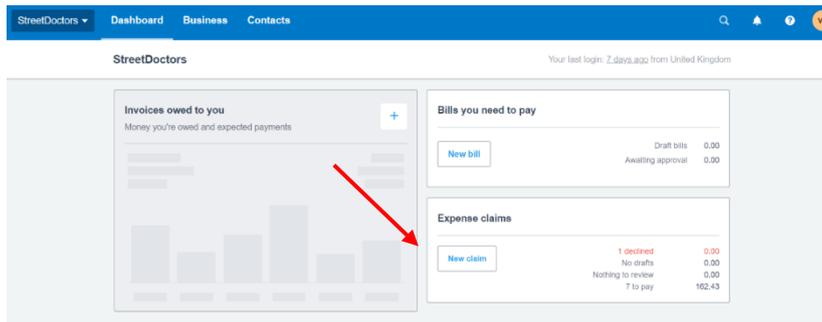
StreetDoctors – Claiming Expenses on Xero



Expenses can only be claimed in line with the relevant expenses policy – see the volunteer or staff handbooks for detail. By submitting an expense claim you are saying the expense was wholly and necessarily incurred for the purpose of StreetDoctors business.

Website

- Log on to xero.com using the [team].finance@streetdoctors.org login-
 - Forgotten password- click reset
 - Log on to [team].finance@streetdoctors.org gmail for password reset link
 - If forgotten email katiem@streetdoctors.org to reset
- On the dashboard, click on “New claim” in the Expense claims box



- Attach an image of the receipt and fill in the form as below

The screenshot shows the 'New expense claim' form in Xero. The form includes the following fields and annotations:

- Upload receipt- required**: A red box highlights the 'Upload an image' section.
- Please write detailed description e.g. " 1 x bus fare from station x to station y for session at Purple school Wednesday 2nd Feb"**: A red box highlights the 'Description' field.
- IMPORTANT- full name of volunteer to be reimbursed**: A red box highlights the 'Spent at' field.
- Most will be "Local Team- x" "Volunteer Training" is for events only**: A red box highlights the 'Account' field.
- Team REQUIRED Fund leave blank**: A red box highlights the 'Team' and 'Fund' fields.
- If volunteer's name comes up as a customer, add it. If not leave blank.**: A red box highlights the 'Assign to customer' field.
- Label**: A red box highlights the 'Label' field.

The form also includes a 'Purchase amount' field set to GBP 0.00, a 'Spent on' date field set to 17 Feb 2022, and a 'Subtotal including tax' field set to GBP 0.00.

StreetDoctors – Claiming Expenses on Xero

MOST IMPORTANT THINGS:

- Spent At: **full name** of volunteer to be reimbursed
- Upload receipt
- Claim within 3 months

Notes

- Once you submit an expense, it is reviewed by NVC or regional partnerships officer depending on your area. If you have any issues or questions direct them there!
- **PETROL**- in description state location, session if applicable, and mileage. In receipt, upload screenshot of maps journey showing same mileage. We will reimburse 45p per mile so this should amount to the cost
- If the volunteer does not come up as a contact, don't worry. Email their bank details to finance@streetdoctors.org with their full name and team and they will be reimbursed.
- Only expense one meal/ pizza per year at Team Set Up please. If you have a particular request or idea that you would like to be funded just ask! nvc@streetdoctors.org