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| 1. **External Examiner Expenses and Fees Guidelines** |

The University must ensure that payments comply with HM Revenue & Customs guidance and legal obligations. It is therefore essential that the rules detailed in this guide are followed when making an expenses claim.

* 1. **Authorisation of Payment of PGR Fees and Expenses** 
     1. PGR claim forms are sent by the Thesis Department along with the Viva Reports. Alternatively, they can be downloaded from [external examiner webpage](https://www.qub.ac.uk/directorates/AcademicStudentAffairs/StudentServicesSystems/StudentRegistryServices/Exams/ExternalExaminerGuidelines/)
     2. Payment of PGR fees and expenses is normally at the end of the following month of receipt of the claim form.
     3. Fees and expenses will only be processed if the examiner’s report has been received by the Thesis Department.
     4. PGR claim forms should be submitted no later than eight weeks after the date of the Viva.
     5. PGR claim forms and receipts are emailed to [extexamexpenses@qub.ac.uk](mailto:extexamexpenses@qub.ac.uk)
  2. **Authorisation of Payment of UGT/PGT Fees** 
     1. UGT/PGT Fee claim forms can be obtained from the School or alternatively, downloaded from [external examiner webpage](https://www.qub.ac.uk/directorates/AcademicStudentAffairs/StudentServicesSystems/StudentRegistryServices/Exams/ExternalExaminerGuidelines/)
     2. The Chair of the Board of Examiners is responsible for ensuring that the fee claim is a true reflection of the work undertaken by the UGT/PGT external examiner.
     3. Payment of UGT/PGT fees is normally 4-8 weeks after the submission of the form. Fees will only be processed if signed by the Chair of the Board of Examiners and the examiner’s Annual Report has been received by Academic Affairs.
     4. UGT/PGT Fee claim forms should be submitted once per year, covering the previous academic year. The form should only be submitted after all Examining has taken place.
     5. UGT/PGT claim forms must be sent to the School in the first instance to be signed by the Chair of the Board of Examiners. The School will then email the completed form to External Examiners Expenses Department. If your claim form is already signed by the Chair of the Board Examiners, please email it along with receipts to [extexamexpenses@qub.ac.uk](mailto:extexamexpenses@qub.ac.uk)
  3. **Authorisation of Payment of UGT/PGT Expenses** 
     1. The Chair of the Board of Examiners should ensure that all expenditure on University Business is justified and that all claims are in accordance with University’s travel and expense policy and purchasing regulations.
     2. Claims for reimbursement of expenses should be made as soon as possible after the event giving rise to the claim and **no later than eight weeks** following the date of expenditure. This is to ensure that the purpose of the claim is current, clear and understood and that timely recording can be made for budgetary control purposes.

If claims are received by the last day of the month, then the payment will usually be at the end of the following month. These arrangements are subject to change due to public holidays / holiday closures.

Payment of expenses will be authorised on receipt of a completed claim form signed by the Chair of the Board of Examiners and accompanied by evidence of costs incurred.

Expenses are paid directly to the external examiner only, we do not reimburse external institutions or companies who have paid on behalf of the examiner.

* 1. **Expenses Receipts**

Original receipts or invoices and supporting information must be provided for all claims. If receipts are not provided, Queen’s will be unable to reimburse the cost. Expenses claims and receipts may be submitted electronically to the External Examiner Office.

For reimbursement purposes:

* Receipts must be legible;
* A receipt must include details of expenditure incurred, the name of the vendor, a breakdown of items, date of transaction, and total amount paid; and
* A credit card counterfoil or credit card statement is not acceptable as a receipt – a proper receipt should be obtained, which details the goods purchased, as above.

In the event of lost or missing receipts, you should seek duplicate receipts or produce alternative proof of payment, and provide an explanation and details of the expense on the claim.

* 1. **Foreign Currency**

Where expenses have been incurred in a currency other than sterling, the claim should be made in sterling and the reimbursement amount calculated using the actual sterling cost, e.g. credit card statement conversion, cost of currency bought. Evidence to support the rate should be provided.

* 1. **Form of Payment**

Expenses are normally paid by cheque sent to the address provided on the claim form. Payment by bank transfer to UK bank accounts *only* is available upon receipt of a BACS form.

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| 1. **Travel Policy** |

* 1. Travel costs are covered for examining a PGR Viva or for UGT/PGT Exam Boards only. Expenses for UGT/PGT exam boards will be covered for up to two visits in the first academic year of appointment and up to one visit each academic year thereafter. Given Queen’s University’s Green Initiative, for each following academic year, examiners are encouraged to use online resources such as Skype for Board/Viva Attendance.
  2. The University has appointed travel agents to fulfill its business travel, accommodation and other associated requirements. You must contact your School to arrange your travel and accommodation directly. The School will then liaise with the External Examiner Office to arrange payment of the travel and accommodation.
  3. The maximum amount covered by the External Examiner’s Department towards travel is £250. Any travel costs in excess of this will be covered by the School.
  4. Wherever possible, and subject to business needs, travel arrangements should be made in good time to take advantage of cheaper fares or accommodation.
  5. The mode of travel should be the most cost-effective method consistent with the business needs of the University. For example, a flight might be cheaper than rail travel; rail travel might be cheaper than car mileage payments or taxis.
  6. Any changes of travel must be approved by the School prior to booking as Student Services and Systems will not reimburse unless there are extenuating circumstances and cannot be claimed elsewhere.
  7. External examiners should not be influenced by any promotional incentives such as airline mileage credits or personal cash credit card discounts or rebates. In cases where incentive schemes are offered, for example by airlines, employees should not benefit personally from these incentives but should use them to offset the cost of current or future business journeys. External examiners using air mile credits for private travel would be an unacceptable personal benefit from expenditure of public funds.
  8. Spouses shall not travel at Queen’s expense. A spouse may accompany an external examiner for personal reasons. In such instances, Queen’s must not be charged for more than if the member of external examiners had travelled alone. Wherever possible, the spouse's travel costs should be invoiced separately and paid privately. If the invoice includes both private and official travel costs, the external examiner should settle the total invoice and reclaim the official element from Queen’s. Separate private insurance must be taken out to cover the spouse's travel.
  9. The external examiner shall not claim any additional travel costs, subsistence or other expenses for days taken as a holiday linked to the trip.
  10. Queries on making travel arrangements should be directed to the School.
  11. External examiners travelling from overseas are advised to have passports valid for at least 6 months after their return. The International Office, 02890 973899, will provide advice on the need for visas.
  12. In all cases the external examiner may be expected to meet costs in the first instance and submit a claim later, in which case an official Queen’s Claim Form must be used.
  13. **Car Mileage**

Claims for car usage will be met if it is within the £250 total travel budget and at the discretion of the School concerned and normally will be permitted only where public transport is unavailable or impractical, or where the mileage claim is cheaper than the cost of making the journey by public transport.

Mileage in these circumstances will be paid at the rate of 40p per mile for the first 100 miles, and 25p per mile thereafter.

Details of all journeys including the date, starting point and destination for each should be shown on the expenses claim form.

* 1. **Car Insurance - Private Vehicles**

As Queen’s does not provide car insurance cover for external examiners using their own vehicles, external examiners are required to confirm that they have taken out personal motor insurance with an appropriate extension to cover use in connection with external examining business. The mileage rates payable by Queen’s includes an element to defray the cost of insurance as well as vehicle depreciation, fuel etc.

* 1. **Car Parking**

Queen’s will reimburse all expenses for car parking costs incurred whilst travelling on external examining business within the £250 travel budget. Claims must be supported by receipts.

Claims for parking excess charges, fines on all motoring related offences, wheel clamping, etc. will not be reimbursed under any circumstances.

* 1. **Public Transport**

Where external examiners use public transport they will be reimbursed on a receipts basis provided the expenses are reasonable and within the £250 total travel budget.

* 1. **Rail Travel**

In general, all external examiners should ensure that the most economical class of travel is used. In practice, this will usually be standard class.

If an external examiner wishes to travel in first class, they may pay the difference in cost to do so. Alternatively, prior approval must be obtained from the Head of School/Director.

* 1. **Taxis**

In general, Taxis should only be used for travel between home and public transport, and/or public transport and Queens University.

Claims for taxis will be met at the discretion of the School concerned and normally will be permitted only where public transport is unavailable or impractical.

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| 1. **Other Expenses** |

All claims for ‘other expenses’ must be supported by receipts.

* 1. **Subsistence**

Gratuities will not be refunded, unless included on an itemised bill as a service charge and not as an addition by the Claimant.

Where the examiner pays for the cost of lunch/dinner during their visit, the following limits will apply:

* £15 for lunch
* £25 for dinner

Alcohol will not be reimbursed. Any expenditure in excess of this should be approved in advance by the Chair of the Board of Examiners and will be covered by the School. Appropriate receipts must be included. Student Services will only reimburse costs for external examiners.

* 1. **Accommodation**

Hotel accommodation must be arranged by your School, and the costs will be paid directly by the Exams Office.

The University will only bear the cost of accommodation required for business purposes and will not meet the costs of any extensions to a stay for personal reasons or for accommodation provided to a spouse or other family members. Only claims up to the value of £100 per night for a maximum of two nights will be paid. Any costs in excess of this must be approved in advance by the Chair of the Board of Examiners and will be covered by the School.

* 1. **Personal Items**

External examiners should note that items of a personal nature, such as alcoholic drinks, mini-bars, movie hire etc. will not be reimbursed by Queen’s and these should be deducted from any bills submitted for reimbursement.

* 1. **Broadband**

It is University policy not to reimburse external examiners for Broadband services or related equipment. These services should be made available on-campus by the School if requested.

* 1. **‘Staying with Friends’ Allowance**

Where external examiners choose not to stay in a hotel or guest house and instead stay with friends or relatives, allowance of £25 per night for a maximum of two nights may be claimed as a contribution towards the costs incurred by friends or relatives in providing the accommodation. This allowance is instead of any hotel costs for bed and breakfast which might normally be claimed.

* 1. **Travel Insurance**

External examiners are not insured under the Queen’s Travel Insurance Policy. Costs for travel insurance will be reimbursed for external examiners travelling from outside the UK or Ireland provided they are within the total travel budget of £250. Any costs in excess of this will be covered by the School.

* 1. **Travel Visas**

We do not reimburse for travel visa costs. Please contact the School to arrange this.

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| 1. **Completing a Claim Form** |

* 1. **PGR Claim Forms**

Claim forms are sent to the examiner by the Thesis Department along with the Viva Report, or alternatively, they can be downloaded from [external examiner webpage](https://www.qub.ac.uk/directorates/AcademicStudentAffairs/StudentServicesSystems/StudentRegistryServices/Exams/ExternalExaminerGuidelines/).

Claim forms must be fully completed (sections 1-3) and emailed to [extexamexpenses@qub.ac.uk](mailto:extexamexpenses@qub.ac.uk) along with a clear scan of the receipts.

Claims forms cannot be processed unless ***all*** details have been completed. Fees are determined by the Degree examined and are set out below:

* Master Degree by Research: £110
* Doctor of Philosophy & Doctor of Medicine: £155
  1. **UGT/PGT Expenses Claim Forms**

UGT/PGT expenses claim forms are available from the School or, alternatively, from [external examiner webpage](https://www.qub.ac.uk/directorates/AcademicStudentAffairs/StudentServicesSystems/StudentRegistryServices/Exams/ExternalExaminerGuidelines/).

Claims forms cannot be processed unless all sections have been completed and the form has been signed by the Chair of the Board of Examiners.

Submit completed forms to the School in the first instance to be signed by the Chair of the Board of Examiners. Once signed, the School will email the completed forms and receipts to External Examiner Expenses Office for processing.

Expenses claims can be submitted at any time in the academic year but no later than eight weeks from the date of expenditure.

* 1. **UGT/PGT Fees Claim Forms**

UGT/PGT expenses claim forms are available from the School or, alternatively, from [external examiner webpage](https://www.qub.ac.uk/directorates/AcademicStudentAffairs/StudentServicesSystems/StudentRegistryServices/Exams/ExternalExaminerGuidelines/).

Claims forms cannot be processed unless all sections have been completed and the form has been signed by the Chair of the Board of Examiners.

Submit completed forms to the School in the first instance to be signed by the Chair of the Board of Examiners. Once signed, the School will email the completed forms to External Examiner Expenses for processing.

Fee claims must be submitted once per academic year after all examining has taken place.

Payment of fees will not be authorised until the external examiner’s annual report has been received by Academic Affairs.