

**Queen Mary University of London  
Doctoral College  
PGR Finance Guidance and FAQs**

1.0 Introduction .....	1
1.1 PGR Equipment .....	1
2.0 Travel and Accommodation .....	2
2.1 General.....	2
2.2 Key Travel Guides.....	3
2.3 Long-Term Travel (3+ months for research and/or field work).....	4
2.4 Subsistence on fieldwork/ research travel .....	4
2.5 Airbnb or similar accommodation sites .....	4
3.0 Paying Research Assistants .....	5
4.0 Expenses.....	5
4.1 Queen Mary Finance Expenses Policy .....	6
4.2 Expense Claims and Process .....	6
5.0 Insurance and Risk Assessments.....	7
FAQs .....	7

## 1.0 Introduction

All postgraduate research students (PGRs) are required to consistently adhere to the University’s Finance and Expenses Policy. This guidance serves as a reference and information source for PGRs regarding financial matters and policies at QMUL.

Your initial contact must be your school/department administrator and your supervisor. If you are a PGR involved in CDT/DTPs, please reach out to your supervisor and the designated CDT/DTP manager/administrator as your programme may have distinct procedures.

### 1.1 PGR Equipment

For equipment such as laptops, cameras, and other IT products, you must start by reaching out to your supervisor. Once you receive approval from the budget holder (typically your supervisor), proceed to contact your school finance administrator and/or DTE administrator/manager for purchase arrangements. They will guide you through the procurement process at QMUL and coordinate with the IT team for any IT equipment requirements.

## 2.0 Travel and Accommodation

### 2.1 General

All travel and accommodation must be booked via Key Travel.

You must first visit the [Key Travel website](#) to obtain a quote and then email/share it with your supervisor and school/department administrator to arrange purchase of your chosen travel/accommodation via a Purchase Order.

#### **Key information to note from the [Expenses Policy](#):**

##### UK accommodation rates

Section 4.7 As a guideline accommodation is expected to be of UK 3-star standard. In exceptional circumstances these may be exceeded provided the prior written approval of the budget holder is obtained and both the member of staff and the approving budget holder consider that circumstances warrant the incurrence of higher costs (such as the hotel being the nominated conference hotel – often obtained at a discounted rate). Contact your supervisor and school finance administrator/DTE finance administrator if you do not know who the budget holder is.

Section 4.8 Value for money principles are a guiding factor when booking accommodation, and in some circumstances it will be more economical and therefore appropriate to book accommodation of a higher standard than 3-star: for example where it can be evidenced that a 4-star hotel is able to be booked at a cheaper rate than 3 star hotel options, or where there are other relevant costs to factor in to assess the cumulative cost of a trip, e.g. meals or travel costs.

##### **Please note:**

- Approval in advance and clear documentation of justification are crucial if a booking falls outside the standard 3-star policy. This is especially applicable when arranging accommodations independently rather than through Key Travel, and it's important to include this information when submitting an expense claim.
- The value for money factor is a guiding principle, however it should be noted that there are cheaper options on Key Travel, which can be accessed via the Key Travel online booking system, and which may be more appropriate/budget friendly, e.g. Youth Hostels.

##### Overseas accommodation rates

Section 4.9 HMRC provide benchmark scale rate expenses payments for accommodation. This publication should be referred to as a guide of what room costs are expected prior to booking: [HMRC Worldwide Subsistence Rates](#)

### Taxi travel

Section 3.33 Taxi fares may be claimed where no suitable public transport is available, when travelling in an unknown locality, where public transport is infrequent, or for personal safety reasons.

You must provide supporting justification on any expenses claim or it is likely to be rejected by the expenses team.

### Rail & Coach Travel

Section 3.12 Travellers should book well in advance and wherever possible take advantage of saver or super- saver tickets. This must be booked via Key Travel in the first instance.

Section 3.13 Timed returns should always be booked unless it is not possible to estimate with certainty your time of return, in which case open-returns may be booked.

Section 3.14 Travellers are expected to travel standard class, however first class travel may be booked where this is cheaper than published standard class fares for timed arrivals and departures (i.e. not open-ended standard class returns) which can be the case depending on the date bookings are made. An explanation will need to be provided. Travel must be booked as far in advance as possible to take advantage of early release tickets. Any claims for first class would be expected to be supported by screen shots of standard fare prices when bough at the same time.

Please refer to the [Expenses Policy](#) for further information.

## 2.2 Key Travel Guides

### **Key Travel Online Full User Guide:**

<https://my.keytravel.com/media/5143/kt-online-full-user-guide-uk-inc-all-v5.pdf>

See Expenses Policy, section 3:

*3.6 The Travel Management Companies (TMC) must be used for travel and accommodation unless an exceptional reason is given not to.*

*3.10 However, in **very exceptional circumstances**, staff may use other arrangements to book their travel where they can demonstrate that this provides better value for*

*money or where the relevant services are demonstrably not provided by the TMC. Time spent searching and booking travel including the potential cost of cancellation must also be factored in when using non-approved arrangements.*

In exceptional situations\*, if you can demonstrate that buying travel and accommodation independently is more cost-effective than utilising Key Travel services, you may be permitted to make your bookings outside of Key Travel services. You must arrange and pay for your travel and accommodation through your school/department in collaboration with Key Travel to avoid PGR students being out of pocket. However, in rare cases, if you need to claim expenses for travel and accommodation, please obtain quotes from Key Travel as evidence that they could not provide suitable travel or accommodation options (see [Expenses Policy 4.0](#)).

\* Exceptional situations may also encompass extended travel and accommodation needs, such as those spanning 3 months or longer, which are essential for your fieldwork or research requirements. For additional guidance, please refer to [Long-Term Travel 2.3](#) and reach out to your school/department administrator.

### 2.3 Long-Term Travel (3+ months for research and/or field work)

Key Travel is generally equipped to address a wide range of travel and accommodation requirements. Nonetheless, if your situation involves a stay exceeding 3 months or the accommodation suggested by them is unsuitable for your specific visit, it is advisable to initiate a discussion with your supervisor initially. Subsequently, collaborate with your school/department administrator to find the most suitable solution for your needs. Please note that Airbnb bookings or similar accommodation sites are not authorised by QMUL Policy (see [Airbnb 2.5](#))

### 2.4 Subsistence on fieldwork/ research travel

All receipts must be kept and provided using the expenses process as outlined in QMUL's Expenses Policy. See [Expenses Policy section 4.0](#). For information on acceptable UK and Overseas Subsistence costs please refer to pages 9-11 of the [Expenses Policy](#). If you are unsure whether a cost falls within policy guidelines, contact your school/department administrator.

### 2.5 Airbnb or similar accommodation sites

**QMUL Finance does not reimburse Airbnb bookings or similar accommodation sites.**

*4.3 The university does not approve the use of AirBnB, or similar, as the University cannot guarantee meeting its Duty of Care requirements to ensure the traveller's safety in this type of accommodation. It is, for instance, unknown if the party offering the accommodation holds relevant insurances and the accommodation may not have*

*been assessed for fire safety, building or wiring codes or have appropriate fire alarms, exits etc. AirBnB are not liable in the event of death or personal injury.*

### 3.0 Paying Research Assistants

Payments to research assistants will typically be processed through the payroll system. Payments to individuals for their work must strictly adhere to financial policy and follow HR procedures. It is essential to establish the worker's employment status, their Right to Work in the UK, and the agreed pay rate before any work commences. Please see the following routes to payment flowchart here for further information:

[R2P-overview-v3.pdf \(qmul.ac.uk\)](#)

This process may involve using a One-Off Payment Form and checking the worker's Right to Work. More information can be found here:

[https://hr.qmul.ac.uk/procedures/contracts/one\\_off/](https://hr.qmul.ac.uk/procedures/contracts/one_off/).

If you are considering employing individuals on a temporary or hourly basis, for roles such as Research Assistants or Participants, it is advisable to consult with HR to determine the feasibility of such arrangements. Contact your supervisor and/or School/Department Administrator for further guidance.

Further information on reimbursing expenses and payments for involvement and participation in research can also be found here:

<http://irmo.org.uk/performing-research/involving-patients-in-research/reimbursing-expenses/>

**Please note with reference to the link above:** the section on paying public contributors and expenses at QMUL towards the bottom of this page references payment for childcare, which is not covered in the main expenses policy. This page instructs individuals to email [apinvoices@qmul.ac.uk](mailto:apinvoices@qmul.ac.uk) for expenses, whereas the correct email address for expenses is [expenses@qmul.ac.uk](mailto:expenses@qmul.ac.uk).

### 4.0 Expenses

As students, all PGRs at Queen Mary University of London must always abide with the University rules and regulations.

As stated earlier in the guidance, the standard practice is for QMUL to cover expenses upfront. This avoids imposing significant costs on our PGRs, preventing them from incurring out-of-pocket expenses. Financial advances to support expenses and travel/accommodation purchases to PGRs is not currently an option. As a result, all payments must be requested via the expenses procedure. Whenever feasible, please make travel and accommodation bookings through Key Travel, in coordination with your supervisor and School/Department Administrator. For subsistence expenses, these must be claimed through the expenses route.

## 4.1 Queen Mary Finance Expenses Policy

QMUL's Expenses Policy can be found here:

<https://arcs.qmul.ac.uk/media/arcs/policyzone/Expenses-Policy.pdf>

Key Points to Note from the QMUL Expenses Policy are:

- Queen Mary will only reimburse expenses **after expenditure**. Remember to **keep all receipts/proof of payment**:

*2.8 It is a HMRC requirement for receipts to be retained. All receipts must accompany the expense claim: either scanned, uploaded, and attached to online expense claims or if submitted on paper attached to the claim. Missing receipts will delay payment of expenses and will not be reimbursed.*

- All expense claims need to be submitted to Finance within **\*3 months** of the date of expenditure:

*2.7 Claims must be made as soon as possible after incurring the cost of the travel/activity. Any claims submitted after 3 months after the purchase of the travel/activity will be declined for payment unless there are exceptional circumstances for the delay.*

**\*Before submitting your expenses, consult with your School/Department Administrator or the relevant Finance contact to determine their specific deadline requirements. For instance, they may mandate that you send your expenses to them 2.5 months in advance of the deadline. This lead time allows them ample opportunity to review and approve the expenses before proceeding to the reimbursement process.**

## 4.2 Expense Claims and Process

Any expenses claimed by students must adhere to Queen Mary's Travel and Expense policy. Please see [here](#) for the most current version of Queen Mary's Travel and Expense policy and read the policy carefully.

To claim eligible expenses please complete the [QMUL Expense Claim Form](#) and submit this to your School/Department Administrator or appropriate Finance contact.

Make sure that you keep all receipts/proof of payment:

*2.8 It is a HMRC requirement for receipts to be retained. All receipts must accompany the expense claim: either scanned, uploaded and attached to online expense claims or if submitted on paper attached to the claim. Missing receipts will delay payment of expenses and will not be reimbursed.*

## 5.0 Insurance and Risk Assessments

QMUL holds several Insurance Policies which aim to cover the normal educational, research and requirement of the University. PGRs who are travelling within the UK and abroad to conduct research/fieldwork must fill in their trip details on the insurers webpages and contact their supervisor and school/department to obtain further information about what insurance policies and risk assessments need to be conducted before you travel.

Please visit the following links for further information:

<https://www.qmul.ac.uk/finance/intranet/sections/insurance/>

<https://www.qmul.ac.uk/finance/intranet/sections/insurance/travel-insurance/>

### FAQs

*Please note that these FAQs provide a summary of important information, and for more specific guidance, you must refer to the relevant sections in this document and reach out to your supervisor and/or school/department administrator for further support.*

**Can I book my own travel and accommodation outside of Key Travel services?** In exceptional situations, accordingly to [QMUL Finance Policy](#), if you can demonstrate that it is more cost-effective, you may be allowed to book independently. However, it is recommended to coordinate with Key Travel, your supervisor, and school/department administrator for the best course of action.

**Are there specific requirements for long-term travel (3+ months) related to research or fieldwork?** If your research or fieldwork requires a stay of more than 3 months, or if Key Travel's accommodation recommendations are unsuitable, you must discuss this with your supervisor and then collaborate with your school/department administrator to find a suitable alternative or solution.

**Can I use Airbnb or similar accommodation sites for my stay?** No, QMUL Finance does not reimburse Airbnb bookings or similar accommodation sites due to safety and compliance concerns (see [section 2.5](#)).

**How must I process payments to Research Assistants?** Payments to individuals for their work must follow financial policy and HR procedures, and will usually be processed through payroll. Ensure you determine their employment status, Right to Work in the UK, and agreed pay rate before commencing work. Please note that the expenses form cannot be used to reimburse payments to individuals.

**Can I employ individuals on a temporary or hourly basis for roles like Student Ambassadors or Research Assistants?** You must consult with HR to assess the feasibility of such

arrangements. Reach out to your supervisor and/or school/department administrator for further guidance.

**What's the process for reimbursing expenses?** All payments must be requested through the expenses procedure. For travel and accommodation, it's advisable to work with Key Travel, your supervisor, and school/department administrator. Subsistence expenses must be claimed through the expenses route.

**What are the key points to note from the QMUL Expenses Policy?** Receipts are essential and must be retained, as required by HMRC ([section 4.1](#)). Expense claims must be submitted within 3 months of the date of expenditure ([section 4.1](#)). Missing receipts may result in delayed payment or non-reimbursement.

**How do I make an expense claim and where must I submit it?** To claim eligible expenses, complete the [QMUL Expense Claim Form](#) and submit it with your receipts to your school/department administrator or to your appropriate Finance contact (school finance administrator and/or your DTE administrator/manager).

**Are there specific insurance and risk assessment requirements for traveling PGRs conducting research or fieldwork abroad?** Travelling PGRs must contact their supervisor and school/department to obtain information about the necessary insurance policies and risk assessments to be completed when conducting research or fieldwork abroad ([section 5.0](#)).

**Can I get a financial advance as a PGR for my expenses?** As stated earlier in the guidance, the standard practice is for QMUL to cover expenses upfront. This avoids imposing significant costs on our PGRs, preventing them from incurring out-of-pocket expenses. Financial advances to support expenses and travel/accommodation purchases to PGRs is not currently an option. As a result, all payments must be requested via the expenses procedure. Whenever feasible, please make travel and accommodation bookings through Key Travel, in coordination with your supervisor and School/Department Administrator. For subsistence expenses, these must be claimed through the expenses route. Please see [Section 4.0](#).

**What is the importance of determining the Right to Work in the UK when making payments to individuals for their work?** Determining the Right to Work is crucial to ensure compliance with legal requirements and avoid any issues related to immigration laws. It is a necessary step in processing payments to individuals ([section 3.0](#)). The expense process cannot be used to reimburse for payments to individuals, these must be processed in accordance with HR policies via HR.

**Where can I find additional resources on reimbursing expenses and payments for research assistants?** Additional information on reimbursing expenses and payments for research assistants can be found in [Section 3.0](#) of this document. You must consult your supervisor and/or school/department administrator in the first instance.