

Introduction to the Non-Employee Expenses (NEE) Portal:

We have now developed a new system of processing expenses securely online through the use of our “Extranet” platform. The new system will be a secure platform for handling expenses across UKRI and will be used to streamline the process from start to finish.

What are the benefits of using the NEE Portal?

At present, the paper-based system claims are going directly to an employee’s personal mailbox for processing. The new, Extranet-based NEE system has been designed to:

- Move away from paper-based claims
- Add various levels of encryption throughout the claim process to ensure appropriate data protection at each stage
- Ensure no personal data is held on any UKRI employees’ personal emails or drives
- Allow UKRI employees to only see the claim and not the personal information of the claimant
- Be more efficient, user friendly and reduce the time taken to complete and submit claim forms
- Keep users informed of the status of their claim at every stage via email

All claimants will be using one system for UK bank account claims as opposed to having multiple processes as used in the existing paper-based system. The forms that will go to UKSBS for payment will be harmonised, simplifying management of the information and make it easier and less time consuming for all involved.

Accessing the Portal:

Following the panel meeting you will receive an invitation to the BBSRC Expenses Portal. **To access the site, you must log in with the same details that you would use to access the traditional BBSRC Extranet.**

For those with an account please see creating an expense claim section below.

For those without, you will need to create an Extranet account prior to the meeting. Instructions on how to create an account are detailed below.



How to create an account:

You will receive an email inviting you to participate in the site ‘AHRC Expenses Portal’ on the BBSRC Extranet. Please note, the email is automatically generated and may be in your Spam/Junk mailbox. If you have not received / cannot find this, please email your council contact.

- Follow the link in the email to accept the invitation, following the instructions to set up your account

- You will have the choice of creating a BBSRC Extranet account or logging in with a Google, Windows Live ID or Yahoo! Account. **We recommend you set up the account as a 'BBSRC Extranet Account' and NOT to sign in using a personal email account.** This will enable us to assist you if you forget your password.
- The password you set up needs to be a minimum of 7 characters and contain one uppercase character, one lowercase character, one number and one non-alphanumeric character. Once you have registered, the site will take up to one day to update your details and then you will have access to the site.
- Once registered, you will have permanent access to the platform.

Creating an expense claim:

1. Visit the [AHRC Expenses Portal - Home \(bbsrc.ac.uk\)](https://bbsrc.ac.uk)
2. Click **Start New Claim**
3. Enter the Title and Description of the claim, detailing the event that you are making these expense claims against – for instance this could be “AHRC Peer Review Meeting”
4. Numerous expenses can be made on a single claim form by adding these one at a time. To begin, click the type of expense you wish to Claim (**Mileage or General**) then add the expense details, uploading the receipt and then clicking save. This will return you to the claim summary screen, where you can re-enter the “**general**” expenses claim tab and proceed to add another expense with relevant receipts and repeat as necessary.
5. If you have attended more than one panel meeting and are claiming fees, please ensure you submit separate claims for each meeting. Please ensure it is clear what meeting the claim is for in the title and description.
6. **For virtual meetings** where no expenses were incurred, please leave the expenses tab **blank**. Please ensure the option “**opt in**” has been selected in order to claim panel fees. Your council contact will add the attendance fee to your claim during the review and processing stage.
7. If you are only claiming expenses (no fees) please ensure the “**opt out**” option is selected.
8. Input the Council, Contact Name and Email of the specific contact you have been given
9. Click **Edit User** details - these are used to authorise the banking payment
10. Click **Add Bank Details** - these details are encrypted and submitted alongside your claim
11. Click **Submit for Approval** – Check all details are correct and tick the declaration box
12. Click “**I confirm**” to submit your claim for approval. You should receive an email notification confirming that your claim has been submitted for approval

Action Buttons:

Save – will attempt to save your Claim details (provided they pass validation) and return you to your claims summary screen

Close – will return you to your claims summary screen without making any changes

Delete – will remove all details and expenses related to this claim

Submit for Approval – will attempt a final validation (checking bank details and user details are complete) and take you through to a final declaration screen

Note: Bank Details, Personal Details and Expenses are saved separately to the claim, so if you close the claim any changes you have made to these elements will still be kept.