



FYP Student **MUST** seek advice from Ms Rita Wong of ECE Administration Office (Room 2457) before submitting the E-form

# EXPENSE CLAIM FOR STUDENT E-FORM User Guide

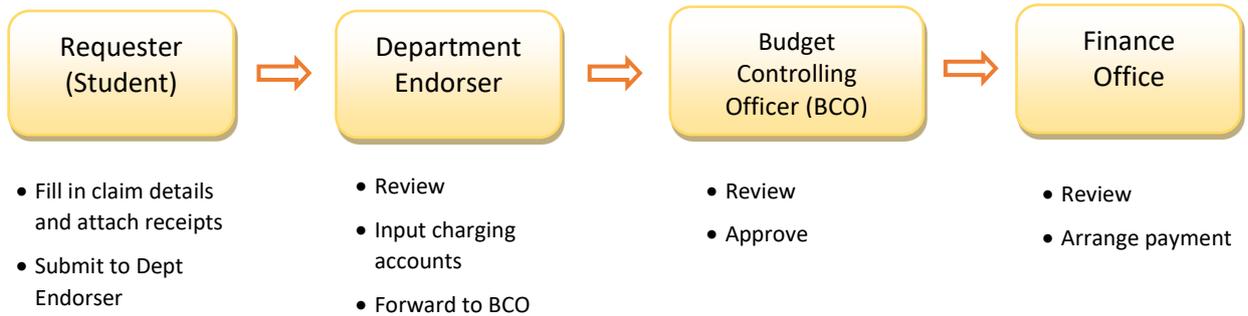
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## Part 1 - User Guide for Student

### 1 Workflow



**Note:** For reimbursement of procurement item > HK\$10,000, the e-form will be routed to Purchasing Office for exceptional approval before sending to the Finance Office

### 2 Create and submit a new form

#### 2.1 Access the e-form

FO website (<https://fo.ust.hk>) > Students > Expense Claim for Student e-form

The screenshot shows the Finance Office website interface. At the top, there is a navigation bar with the text 'Office of the Vice President for Administration and Business' and a search icon. Below this, the website header includes 'THE HONG KONG UNIVERSITY OF SCIENCE AND TECHNOLOGY' and 'FINANCE OFFICE'. A main navigation menu contains links for 'ABOUT US', 'STAFF', 'STUDENTS', 'FINANCIAL INFORMATION', 'CONTACT US', and 'A & B PORTAL'. The breadcrumb trail reads 'Home > Students'. The main content area features a large heading 'STUDENTS' and a list of links: 'Expense Claim for Student e-Form' (highlighted with a red box), 'Student Financial Matters', 'Studentships and Fellowships Cut-off date and Payday', and 'Student Travel Outside Hong Kong Application Form'. To the right of the links are two images: a building with a large red sculpture and a circular courtyard.

OR

Use the direct Link to the e-form [Expense Claim for Student e-form](#)

## 2.2 Guideline and Header

**Form ID:** SE21080015

**Status:**

**Guideline**

This e-form should be completed by student claimant and submitted to department administrators (Department Endorser) for further processing. Student claimant may enter the specific email address of the department administrator (if known) or simply select the Department name in the Department Endorser field.

For items in foreign currencies, they will be converted to HK dollar according to the book exchange rates maintained by the Finance Office for the month when the expenses were incurred. For items incurred in different months, please input the details in separate lines so that correct exchange rates can be retrieved by system.

Please ensure the total claim amount is calculated correctly and all relevant receipts are uploaded to support the claim, and the expenses claimed are allowable according to the funding rules of the selected charging account(s). Otherwise the claims will be returned to the Department Endorser or the student claimant for amendment and reapproval by the Budget Controlling Officer will be required. Reimbursement for procurement of goods and services is allowed up to HK\$10,000. For reimbursement of purchases above the HK\$10,000 limit, the e-form will be routed to PURO for exceptional approval.

The User Guide for this e-form can be found [here](#). For enquiries, please contact Ms Oliva Luk (x-6416; fooliva@ust.hk) for assistance.

You can load back your saved draft and template by clicking [here](#).

**Header**

\* Denotes mandatory field

Requestor: User Acceptance - Student, IS

Department: ISO

Submit To: \*  Department  Specific Endorser

User Acceptance, IS

Email: iswts152@connect.ust.hk

Student ID: iswts152

Contact Number: [Redacted]

Supervisor/advisor/faculty: [Redacted]

**Callouts:**

- Quote this Form ID when communicating with Department
- Please read the general guidelines and policy reminder before completing the e-form
- Provide link to this detailed User Guide and contact information for enquiries.
- Student's information is pre-populated by system
- FYP Student must provide supervisor's name
- Select "Specific Endorser" if you know the name or email of the staff who can help you process this expense claim; otherwise just select the responsible Department
- Please provide your contact phone number in case the Department Endorser / BCO need to contact you for questions related to the claim

**\*\*FYP Students please submit to specific endorser - Ms. Rita Wong (eerita)**

### Submit To: Specific Endorser

or items in foreign currencies, they will be converted to HK dollar according to the book exchange rates maintained by the Finance Office for the month when the expenses were incurred. For items incurred in different months, please input the details in separate lines so that correct exchange rates can be retrieved by system.

Please ensure the total claim amount is calculated correctly and all relevant receipts are uploaded to support the claim, and the expenses claimed are allowable according to the funding rules of the selected charging account(s). Otherwise the claims will be returned to the Department Endorser or the student claimant for amendment and reapproval by the Budget Controlling Officer will be required. Reimbursement for procurement of goods and services is allowed up to HK\$10,000. For reimbursement of purchases above the HK\$10,000 limit, the e-form will be routed to PURO for exceptional approval.

The User Guide for this e-form can be found [here](#). For enquiries, please contact Mr. Bryan Lee (x-5782; fobryan@ust.hk) or Ms Oliva Luk (x-6416; fooliva@ust.hk) for assistance.

You can load back your saved draft and template by clicking [here](#).

**Header**

\* Denotes mandatory field

Requestor: ISO Testing Account 181

Department: ISO

Submit To: \*  Department  Specific Endorser

Select

**Expense Detail**

Line No*	Expense Incurred Date From*	Expense Incurred Date To*	Expense Description*	Amount

**Select User**

Search result: "Chan" Chan

- Contacts
- Organization
  - HKUST
    - AAF
    - ACCT
    - AEMF
    - APCF
    - BioCRF
    - CBE
    - CCSS

CHAN, Alice(achanag)  
 CHAN, Alvin Chun Hei(achchan)  
 CHAN, Amaris Zacharie(azchan)  
 CHAN, Andrew Gachun(agchan)  
 CHAN, Ann Y(acann)  
 CHAN, Ardis(achanah)  
 CHAN, Benjamin Hin Man(ccman)  
 CHAN, Carmen K M(carmenkmchan)  
 CHAN, Casey(cchanav)  
 CHAN, Cheuk Chee(ccchanas)

Close OK

**Callouts:**

- Type the name or email of the staff and press the magnifying glass icon to

**\*\*FYP Students please do not submit to Department  
Refer to last page, please submit to specific endorser - Ms. Rita Wong (eerita)**

**Submit To: Department**

Please ensure the total claim amount is calculated correctly and all relevant receipts are uploaded to support the claim, and the expenses claimed are allowed according to the funding rules of the selected charging account(s). Otherwise the claims will be returned to the Department Endorser or the student claimant for amendment and reapproval by the Budget Controlling Officer. Reimbursement for procurement of goods and services is allowed up to HK\$10,000. For reimbursement of purchases above the HK\$10,000 limit, the e-form will be

The User Guide for this e-form can be found [here](#).  
For enquiries, please contact Mr. Bryan Lee (x-5782; fobryan@ust.hk) or Ms Olivia Luk (x-6416; fookolivia@ust.hk).  
You can load back your saved draft and template by clicking [here](#).

**Header**

\* Denotes mandatory field

Requestor: ISO Testing Account 181

Department: ISO

Submit To: \* **1**  Department  Specific Endorser **2**

Select

Data Browser

Enable Disable all Include Value - + Search

Displaying 1 - 4 of 3

Close OK

**Expense Detail**

Line No:	Expense Incurred Date From*	Expense Incurred Date To*	Expense Description*
1			

**2.3 Expense Detail**

**Expense Detail**

Line No:	Expense Incurred Date From*	Expense Incurred Date To*	Expense Description*	Currency*	Amount*	Book Rate	Equivalent HKD Amount
1	01/07/2021	31/07/2021	Consumables XYZ-1234...	HKD	1,562.78	1.0000	1,562.78
			Category*	Business Purpose*	Justification	Attach Receipt	declare if no receipt
			Lab Consumables/EI	For ABC research project ...		+ Add Attachment	Lost the receipt for item x ...
2	01/08/2021	28/08/2021	XXX Conference registration fee held on 20-23 Aug 2021	CNY	2,500.00	1.1400	2,850.00
			Category*	Business Purpose*	Justification	Attach Receipt	declare if no receipt
			Registration/Confere	To present research paper ...		400-2.JPG -62 KB 412-2.JPG -142 KB + Add Attachment	
<b>Total Equivalent HKD Amount</b>							4412.78

**Notes:**

- Mandatory fields are marked with “ \* ”
- Expense Incurred Date From/To must be within the same month, so that correct book exchange rate can be extracted to convert foreign currency amount to HK dollar.
- Expenses of the same “Category”, in same currency, incurred within the same month AND with same/similar business purposes can be grouped and input in the same transaction line. E.g. you can claim 10 taxi fares for research field trips incurred within the same month in one single line. You may stick multiple receipts in A4 papers and scan as one single file for uploading as attachment.
- For loss of receipt, please declare and provide details in the “declare if no receipt” field.
- Provide “Justification” if there is any policy exception in the claim.

### 2.3.1 Additional Information for Category “Airfare”

Select the highest flight class in the air-ticket package for policy checking:

Category*	Business Purpose*	Justification	Attach Receipt	declare if no receipt	Highest Flight Class in the Air-ticket package:*
Airfare			+ Add Attachment		Please select Please select Flexible Economy Upgradable Economy Business First Class Book Rate
Expense Incurred Date From*	Expense Incurred Date To*	Expense Description*	Currency*	Amount*	

### 2.3.2 Additional Information for Category “Ferry/Train (Overseas)”

Select the ticket class of ferry/train taken during overseas duty trip for policy checking:

Category*	Business Purpose*	Justification	Attach Receipt	declare if no receipt	Ticket Class:*
Ferry/Train (Oversea			+ Add Attachment		Please select Please select Standard Non-standard

### 2.3.3 Additional Information for Category “Hotel”

Provide the hotel check-in and check-out dates for policy checking:

Category*	Business Purpose*	Justification	Attach Receipt	declare if no receipt	Check-in Date*	Check-out Date*
Hotel			+ Add Attachment			

### 2.3.4 Additional Information for Category “Computer” and “Mobile Phone/Portable Electronic Device”

Provide the actual user of the computer/mobile phone/portable electronic device:

Category*	Business Purpose*	Justification	Attach Receipt	declare if no receipt	Actual User*
Computer			+ Add Attachment		Select

### 2.3.5 Additional Information for Category “Meal”

Provide the no. of participant for the meal for policy checking:

Category*	Business Purpose*	Justification	Attach Receipt	declare if no receipt	No. of participant*
Meal			+ Add Attachment		

### 2.3.6 Additional Information for Category “Transportation”

Provide the no. of single trip for this claim item. E.g. if this claim item includes 3 taxi receipts, then input 3 in the “No. of single trip” field:

Category*	Business Purpose*	Justification	Attach Receipt	declare if no receipt	No. of single trip*
Transportation	Go to xxx to collect samples for research...		+ Add Attachment		3

### 2.4 Payment Detail

Payment Detail	
Payee Bank Name:	Payee Bank Account:
Pay Method:*	Select

**Note:**

- Student’s Bank Name and Bank Account Number will be shown here. If any change is required, please go to SIS (<https://sisprod.psft.ust.hk/SISPROD/signon.html>) to update the bank account information before submission.
- Default Pay Method is autopay to student’s bank account indicated above. You may select System Check or Wire Transfer (T/T) for special circumstances.
- For Wire Transfer, please ensure the correct bank account information (such as “Bank Name”, “Bank Account Number”, “Bank Address”, “SWIFT/BIC Code”; and “Intermediary Bank”, if any) have been provided. Please check with your bank if necessary.

Payment Detail	
Payee Bank Name:	Payee Bank Account:
Pay Method:*	Wire Transfer
Bank Name:	Bank Account Number:
Bank Country:	Bank Address Line 2:
Bank Address Line 1:	BIC/SWIFT Code:
Bank Address Line 3:	Paymend Code:
Other Payment Code:	Intermediary Agent 1 - Country:
Intermediary Agent 1 - BIC:	Intermediary Agent 2 - Country:
Intermediary Agent 2 - BIC:	Intermediary Agent 3 - Country:
Intermediary Agent 3 - BIC:	POP:
Bank Charge For TT:	Beneficiary I

## 2.5 Declaration

Please read the declaration details and tick the checkbox before submission:

**Declaration**

By submitting this claim for reimbursement, I declare that:

- The information given in this claim, including any other supporting documents attached, is true, correct and complete; and
- Expenditures submitted in this claim are legitimate and have been incurred wholly, necessarily and exclusively for authorized University's business; and
- Any monies advanced by the University have been deducted from the claim; and
- Any cost relating to the partners, family or others who are not employees or students engaged on the University's business have been deducted; and
- Nothing included in the claim has been previously claimed from the University or from any other person or organization; and
- All the original receipts necessary to substantiate the claim have been submitted; and
- For those items marked with "Declare No Receipt", I have declared that the original receipts were lost or I haven't received any receipts from the supplier/conference organizer. I will not use the receipts (if found) to claim reimbursement from any other source again; and
- Full disclosure/declaration have been made to the relevant approving authorities for any actual or perceived conflict of interest in accordance with the University's policies and guidelines.

## 2.6 Other Information

You can type additional remarks here for Department Endorser / BCO's information:

**Other information**

Remarks:

Please press the button at the upper left corner of the form to confirm the submission, endorsement or approval.

- FYP Student please mark down "FYP/T" and provide the group name

## 2.7 Submit the e-form to Department Endorser

After reviewing the information and ensure they are correct, press the "Submit" button at the top left-hand corner of the e-form to submit the form to the Department Endorser for further processing. (Important Note: the original receipts should be sent to the Finance Office via the Department Endorser for central filing)

Submit | Save Draft | Save Template | Flowchart | Forecast | Print | Refresh | Comments



**The Hong Kong University of Science and Technology**  
Finance Office  
Expense Claim Application for Student

Form ID: \_\_\_\_\_ Status: Start

**Guideline**

This e-form should be completed by student claimant and submitted to department administrators (Department Endorser) for further processing. Student claimant may enter the specific administrator (if known) or simply select the Department name in the Department Endorser field.

For items in foreign currencies, they will be converted to HK dollar according to the book exchange rates maintained by the Finance Office for the month when the expenses were incurred. Please input the details in separate lines so that correct exchange rates can be retrieved by system.

Please ensure the total claim amount is calculated correctly and all relevant receipts are uploaded to support the claim, and the expenses claimed are allowable according to the funding rule. Otherwise the claims will be returned to the Department Endorser or the student claimant for amendment and reapproval by the Budget Controlling Officer will be required. Reimbursement is allowed up to HK\$10,000. For reimbursement of purchases above the HK\$10,000 limit, the e-form will be routed to PURO for exceptional approval.

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For enquiries, please contact Mr. Bryan Lee (x5782; fobryan@ust.hk) or Ms. Olivia Luk (x5782; fobryoluk@ust.hk).

You can load back your saved draft and template by clicking [here](#).

**Header**

*\* Denotes mandatory field*

Requestor :

Department :

Submit To :  Department  Specific Endorser

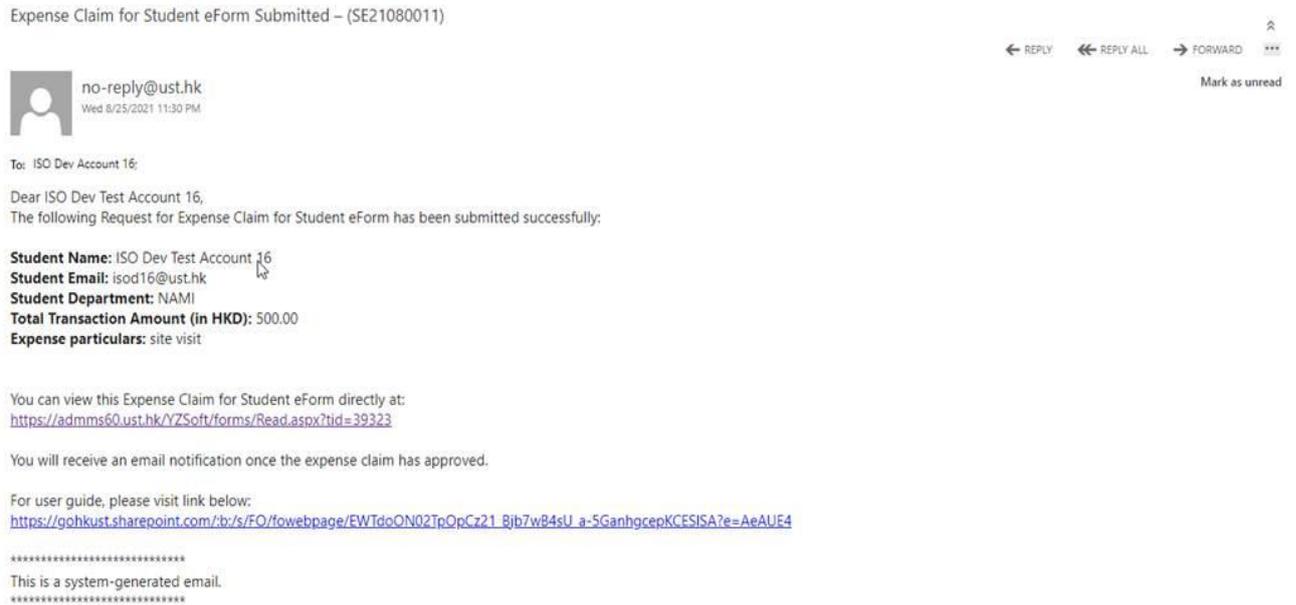
- Ensure the e-form is submitted successfully

Post Succeed

Submit succeed! Serial Number: SE21080015  
Task is transferred to : User Acceptance, IS(iatest80)  
Window will be closed.

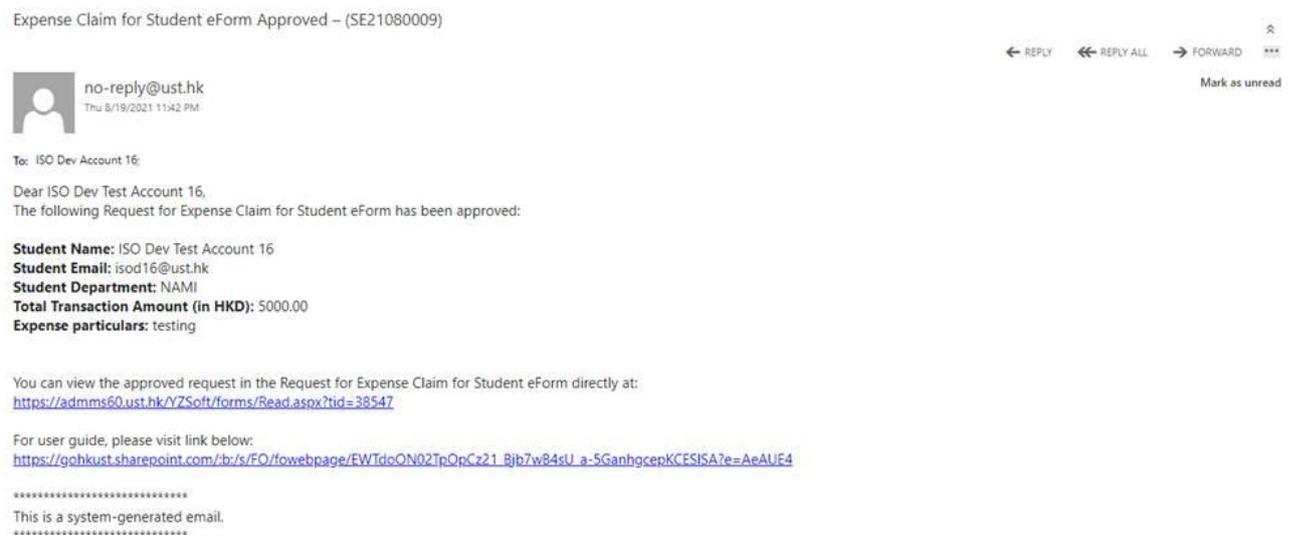
## 2.8 Notification email

Student will receive a system email confirming the e-form has been submitted successfully:



Student will also receive notification email when

- the expense claim was returned by Department Endorser
- the expense claim has been final approved
- After payment is done



## 2.9 Approval Information

Approval Information will be shown (at the bottom of the e-form) after the e-form is submitted. You can retrieve the e-form and track the status of the claim. Payment will be arranged after it is endorsed by FO (Step Name = “End”).

Approval Information					
No.	Step Name	Sign	Action	Date	Comments
1	Start	ISO Testing Account 181	Submit	2021-07-19 14:29	
2	Department Endorser	User Acceptance, IS	Endorse	2021-07-19 14:37	
3	BCO Approver	User Acceptance, IS	Approve	2021-07-19 14:40	
4	BCO Approver	User Acceptance, IS	Approve	2021-07-19 14:39	
5	FO Checker	ISO Testing Account 182	Endorse	2021-07-19 14:43	
6	FO Approver	ISO Testing Account 183	Endorse	2021-07-19 14:46	
7	FO Ad Hoc Approver	User Acceptance, IS	Endorse	2021-07-19 14:48	
8	End			2021-07-19 14:48	Approved

## 3 Other Functions

In the Guideline section there is a link to retrieve the saved draft and template e-forms:



**The Hong Kong University of Science and Technology**  
Finance Office  
Expense Claim Application for Student

Form ID: \_\_\_\_\_ Status: Start

**Guideline**

This e-form should be completed by student claimant and submitted to department administrators (Department Endorser) for further processing. Student claimant may enter the specific email address of the department administrator (if known) or simply select the Department name in the Department Endorser field.

For items in foreign currencies, they will be converted to HK dollar according to the book exchange rates maintained by the Finance Office for the month when the expenses were incurred. For items incurred in different months, please input the details in separate lines so that correct exchange rates can be retrieved by system.

Please ensure the total claim amount is calculated correctly and all relevant receipts are uploaded to support the claim, and the expenses claimed are allowable according to the funding rules of the selected charging account(s). Otherwise the claims will be returned to the Department Endorser or the student claimant for amendment and reapproval by the Budget Controlling Officer will be required. Reimbursement for procurement of goods and services is allowed up to HK\$10,000. For reimbursement of purchases above the HK\$10,000 limit, the e-form will be routed to PURO for exceptional approval.

The User Guide for this e-form can be found [here](#).  
For enquiries, please contact Ms Oliva Luk (x-6416; foolliva@ust.hk) for assistance.

You can load back your saved draft and template by clicking [here](#) .

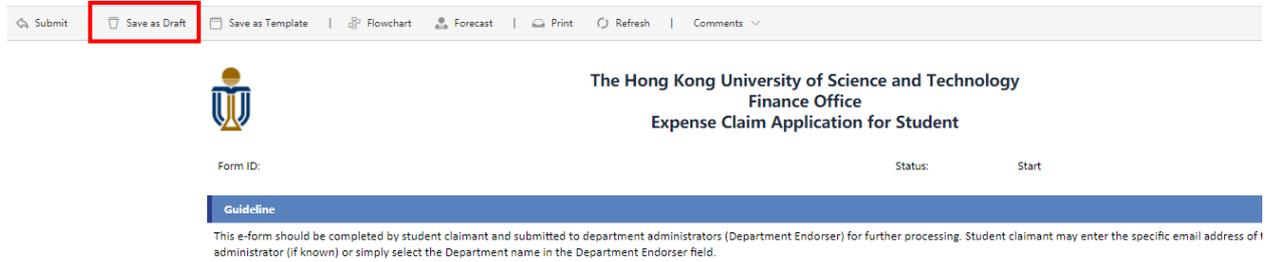


<<
🏠

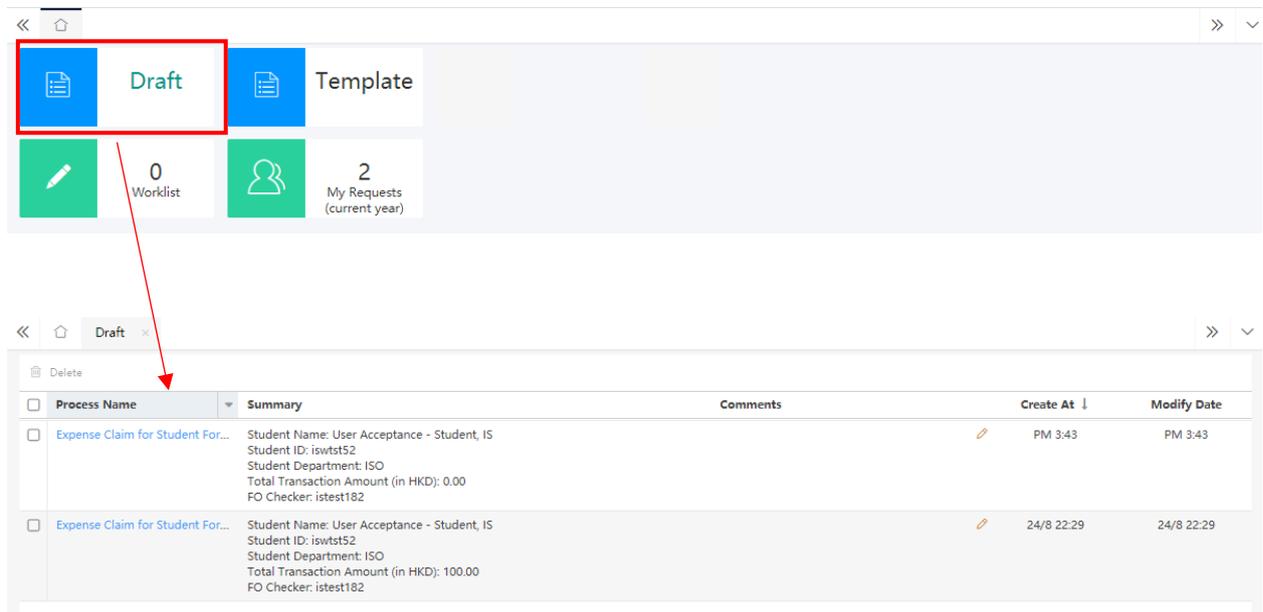
📄	<b>Draft</b>	📄	<b>Template</b>
✍️	0 Worklist	👤	2 My Requests (current year)

### 3.1 Save as Draft

If you cannot complete and submit an e-form in one go, you can save it for further processing later. Press the “Save as Draft” button at the top left-hand corner of the e-form to save you work.

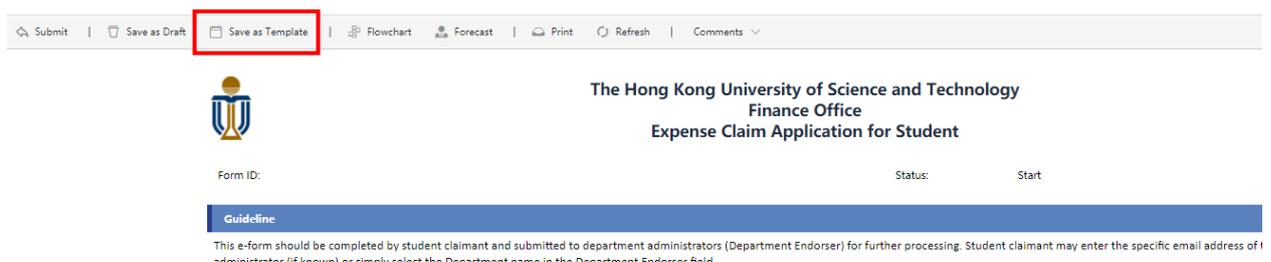


You can retrieve the saved e-forms by clicking the “Draft” function box:

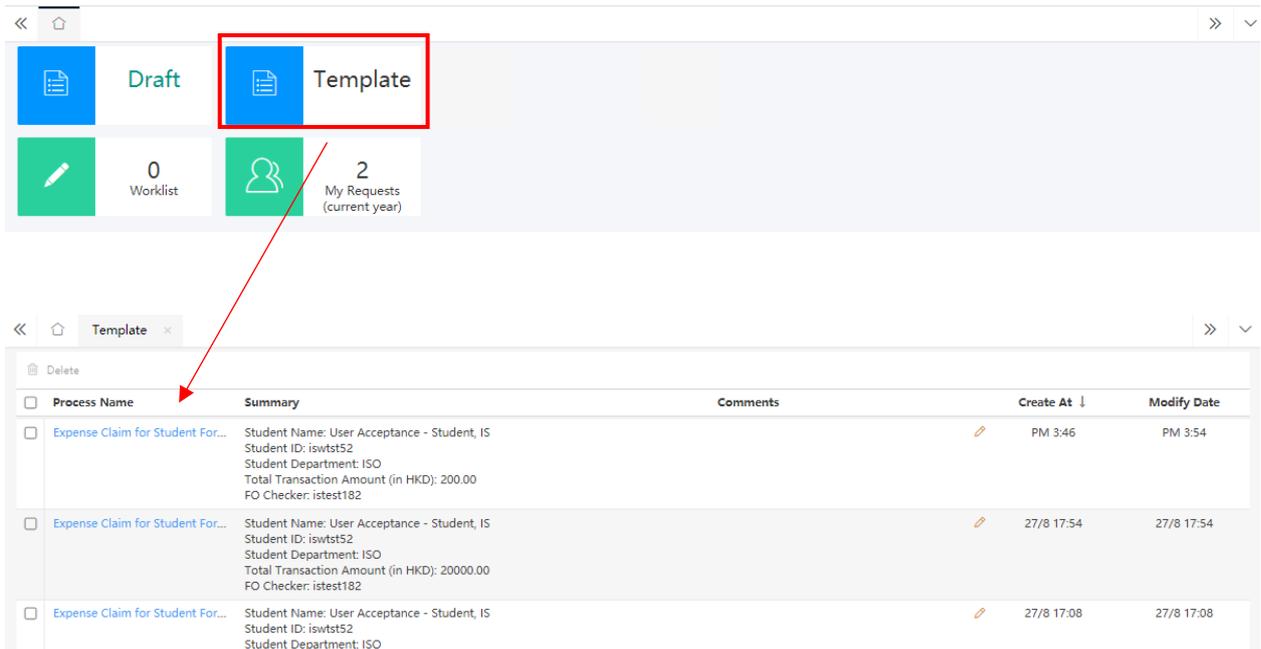


### 3.2 Save as Template

You can also save an e-form as template so that the information in the current e-form can be used to create another e-form in future. Press the “Save as Template” button at the top left-hand corner to save the current e-form as a template.

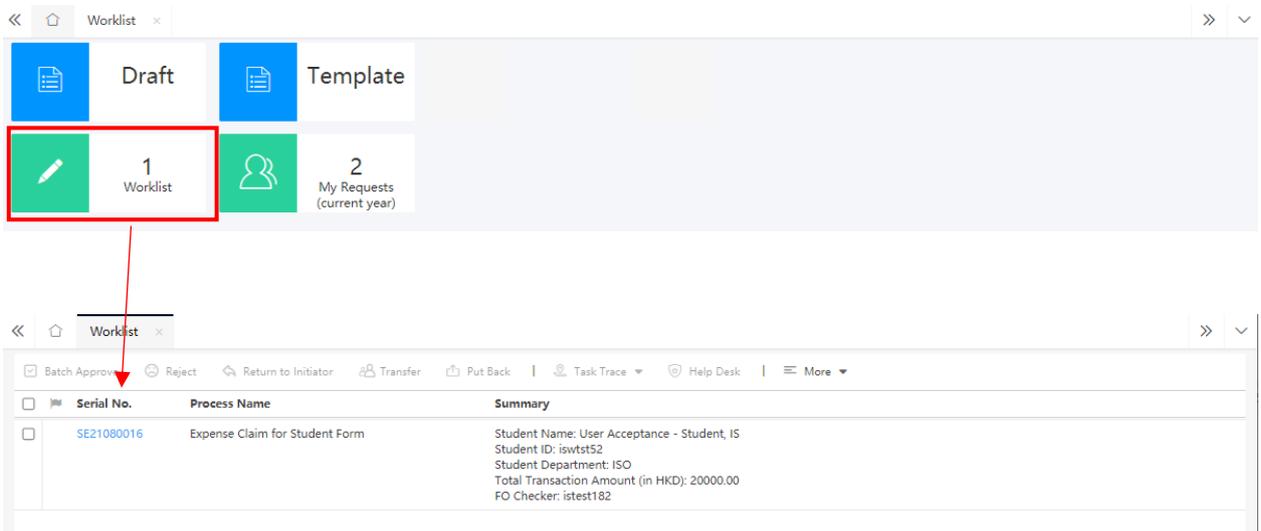


You can retrieve the saved templates by clicking the “Template” function box:



### 3.3 Review Worklist

The e-form which is pending your action (e.g. e-forms returned by Department Endorser for your amendment) can be found in “Worklist”.



### 3.4 Review All e-forms

All e-forms created by you can be found in “My Requests”.

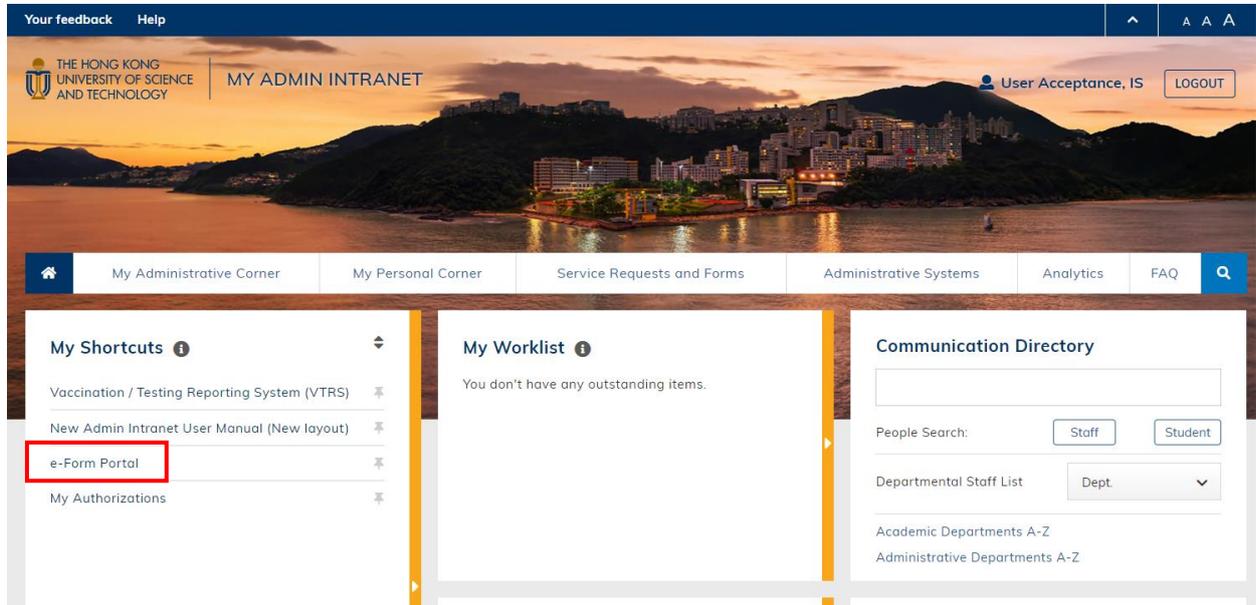
The screenshot displays the application's navigation and data sections. The top navigation bar includes 'Draft' and 'Template' buttons. Below this, there are two green buttons: '1 Worklist' and '2 My Requests (current year)'. The '2 My Requests (current year)' button is highlighted with a red box and a red arrow pointing to the 'My Requests (current year)' tab in the main content area. The main content area shows a table with columns: Serial No., Process Name, Summary, Post At, and Status. Two rows of data are visible, both for 'Expense Claim for Student Form'.

Serial No.	Process Name	Summary	Post At	Status
SE21080016	Expense Claim for Student Form	Student Name: User Acceptance - Student, IS Student ID: iswtst52 Student Department: ISO Total Transaction Amount (in HKD): 20000.00 FO Checker: istest182	27/8 17:54	Start (User Acceptance - ...)
SE21080015	Expense Claim for Student Form	Student Name: User Acceptance - Student, IS Student ID: iswtst52 Student Department: ISO Total Transaction Amount (in HKD): 1362.12 FO Checker: istest182	27/8 17:09	BCO Approver (User Ace... BCO Approver (User Ace...

## Part 2 - User Guide for Department Endorser

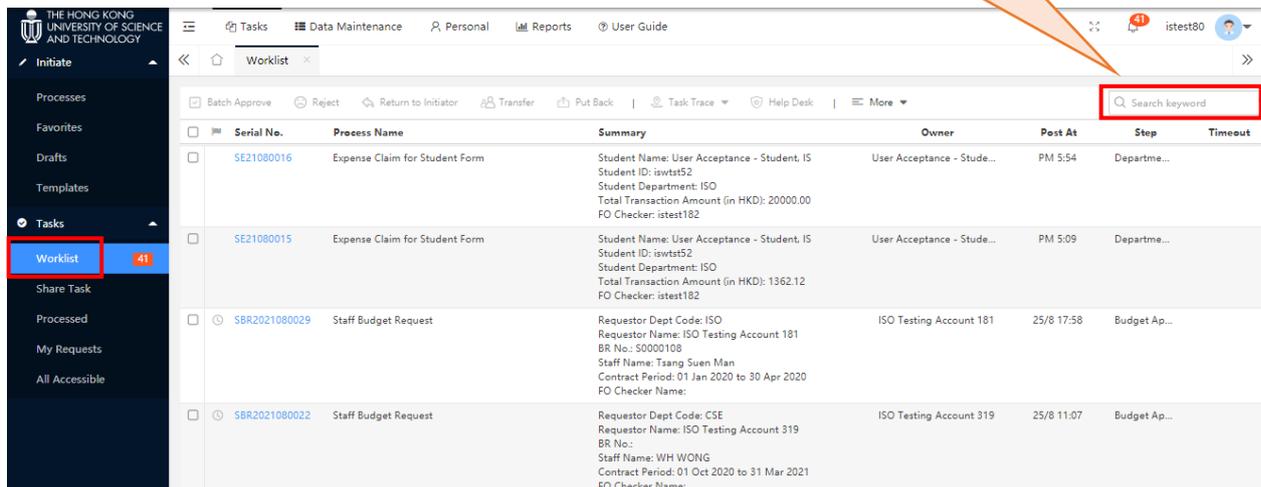
### 1 Access the e-form

My Admin Intranet (<https://my-ai.ust.hk/>) > My Shortcuts > e-Form Portal



Go to "Worklist" to see the e-forms pending for your action

• Can type key words to search the required e-form



Go to “All Accessible” to view all e-forms for which you have the access rights (But cannot take action on e-form if select via here)

• Search by various criteria  
e.g. Process Name, Serial No. (Form ID)

Serial No.	Process Name	Summary	Owner	Post At	Status	Trace
SE21080016	Expense Claim for Student Form	Student Name: User Acceptance - Student, IS Student ID: iswtst52 Student Department: ISO Total Transaction Amount (in HKD): 20000.00 FO Checker: istest182	User Acceptance - Stude...	PM 5:54	Department Endorse...	
SE21080015	Expense Claim for Student Form	Student Name: User Acceptance - Student, IS Student ID: iswtst52 Student Department: ISO Total Transaction Amount (in HKD): 1362.12 FO Checker: istest182	User Acceptance - Stude...	PM 5:09	Department Endorse...	
SBR2021080030	Staff Budget Request	Requestor Dept Code: ACCT Requestor Name: ISO Testing Account 320 BR No.: 50000105 Staff Name: Ah Sang Wong Contract Period: 15 Oct 2021 to 31 Dec 2021 FO Checker Name: istest315	ISO Testing Account 320	26/8 10:48	FO Payroll (ISO Testi...	

## 2 Email Notification

Department Endorser will receive email notification when student submitted the e-form for his/her action

Endorsement is Requested for Expense Claim for Student eForm - SE21080016

no-reply@ust.hk  
週五 27/8/2021 17:54

收件者: IS User Acceptance;

Action Items

Dear User Acceptance, IS,  
Please endorse the following Request for Expense Claim for Student eForm:

Student Name: User Acceptance - Student, IS  
Student Email: iswtst52@connect.ust.hk  
Student Department: ISO  
Total Transaction Amount (in HKD): 20000.00  
Expense particulars: a

You can endorse the Request for Expense Claim for Student eForm directly at:  
<https://admms65.ust.hk/YZsoft/forms/Process.aspx?cid=511742&tid=29044>

You can also follow up or view this request by accessing eForm Systems and then go to Worklist:  
<https://admms65.ust.hk/>

Please take appropriate follow-up action.

For user guide, please visit link below:  
[https://gohkust.sharepoint.com/bs/FO/fowebpage/EWTdoON02TpOpCz21\\_Bjb7wB4sU\\_a-5GanhgcepKCESISA?e=AeAUE4](https://gohkust.sharepoint.com/bs/FO/fowebpage/EWTdoON02TpOpCz21_Bjb7wB4sU_a-5GanhgcepKCESISA?e=AeAUE4)

\*\*\*\*\*  
This is a system-generated email.  
\*\*\*\*\*

Department Endorser will also receive email notification when the e-form is returned from BCO / FO or when the e-form is final approved.

### 3 Review Expense Details and Input Charging Account Information

- Select the e-form require your action via “Worklist” or the URL link provided in the notification email.
- Review and check if the information in Expense Detail is correct and appropriate, and there is sufficient supporting document to substantiate the claim.
- Department Endorser may correct the information in the Expense Detail on behalf of the student.

**Expense Detail**

Line No:	Expense Incurred Date From*	Expense Incurred Date To*	Expense Description*	Currency*	Amount*	Book Rate	Equivalent HKD Amount
1	01/08/2021	26/08/2021	Taxi fares on 2/8, 13/8, 24/8 2021	HKD	580.52	1.0000	580.52

Category*	Business Purpose*	Justification	Attach Receipt	declare if no receipt	No. of single trip*
Transportation	Go to xxx to collect samples for research.		<span style="background-color: #0056b3; color: white; padding: 2px;">+ Add Attachment</span>	Lost the receipt for item x ...	3

Dst No:	Department* / Project*	Fund*	Budget Line	Class	Account	Analysis	HKD Amount*	Approver	Approver Name
1	01000 <small>Select</small>	 <small>Select</small>	0091 <small>Select</small>	P280	 <small>Select</small>	 <small>Select</small>	200.00	istest78	FO Dept A/C FF <span style="float: right;">+ -</span>
2	 <small>Select</small>	G7019 <small>Select</small>	7009 <small>Select</small>	B001	 <small>Select</small>	 <small>Select</small>	380.52	istest78	FO Dept A/C FF <span style="float: right;">+ -</span>

- Input charging account(s) for each transaction line in the following order:
  - i. Department OR Project and the corresponding approver
  - ii. Fund Code and the Budget Line (also Class Code for ITF project)
  - iii. Class Code is optional except for ITF project (already selected in ii. Above for ITF project)
  - iv. Account and Analysis Code is optional (If not selected, Finance Office will select the Account and Analysis Code on behalf of user)
- Input the HKD Amount of each distribution line. The sum of HKD Amount of all distribution lines must be equal to the Equivalent HKD Amount of the corresponding transaction line.

### 4 Declaration

Please read the declaration details and tick the checkbox before submission:

**Declaration**

By submitting this claim for reimbursement, I declare that:

- The information given in this claim, including any other supporting documents attached, is true, correct and complete; and
- Expenditures submitted in this claim are legitimate and have been incurred wholly, necessarily and exclusively for authorized University's business; and
- Any monies advanced by the University have been deducted from the claim; and
- Any cost relating to the partners, family or others who are not employees or students engaged on the University's business have been deducted; and
- Nothing included in the claim has been previously claimed from the University or from any other person or organization; and
- All the original receipts necessary to substantiate the claim have been submitted; and
- For those items marked with "Declare No Receipt", I have declared that the original receipts was lost or I haven't received any receipts from the supplier/conference organizer. I will not use the receipts (if found) to claim reimbursement from any other source again; and

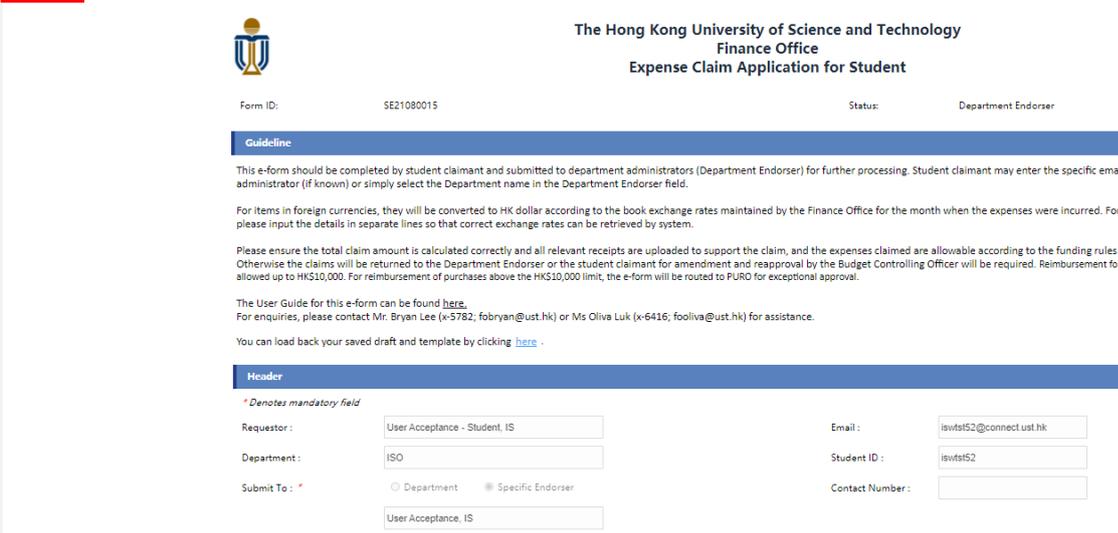
Full disclosure declaration have been made to the relevant approving authorities for any actual or perceived conflict of interest in accordance with the University's policies and guidelines.

By endorsing this claim for reimbursement, I declare that:

- All the relevant University's policies and procedures, the rules and regulations of the funding agencies (if any), have been observed and followed; and
- Justifications and documentary evidences required for supporting out-of-policy exceptions (if any) have been provided.
- Full disclosure declaration have been made to the relevant approving authorities for any actual or perceived conflict of interest in accordance with the University's policies and guidelines.

## 5 Forward to BCO for approval

Press the “Endorse” button at the top left-hand corner of the e-form to send the e-form to BCO(s) for approval



**The Hong Kong University of Science and Technology  
Finance Office  
Expense Claim Application for Student**

Form ID: SE21080015 Status: Department Endorser

**Guideline**

This e-form should be completed by student claimant and submitted to department administrators (Department Endorser) for further processing. Student claimant may enter the specific email administrator (if known) or simply select the Department name in the Department Endorser field.

For items in foreign currencies, they will be converted to HK dollar according to the book exchange rates maintained by the Finance Office for the month when the expenses were incurred. For it please input the details in separate lines so that correct exchange rates can be retrieved by system.

Please ensure the total claim amount is calculated correctly and all relevant receipts are uploaded to support the claim, and the expenses claimed are allowable according to the funding rules of the university. Otherwise the claims will be returned to the Department Endorser or the student claimant for amendment and reapproval by the Budget Controlling Officer will be required. Reimbursement for purchases above the HK\$10,000 limit, the e-form will be routed to PURO for exceptional approval.

The User Guide for this e-form can be found [here](#).  
For enquiries, please contact Mr. Bryan Lee (x-5782; fobryan@ust.hk) or Ms Oliva Luk (x-6416; fooliva@ust.hk) for assistance.  
You can load back your saved draft and template by clicking [here](#).

**Header**

\* Denotes mandatory field

Requestor: User Acceptance - Student, IS Email: isvts152@connect.ust.hk

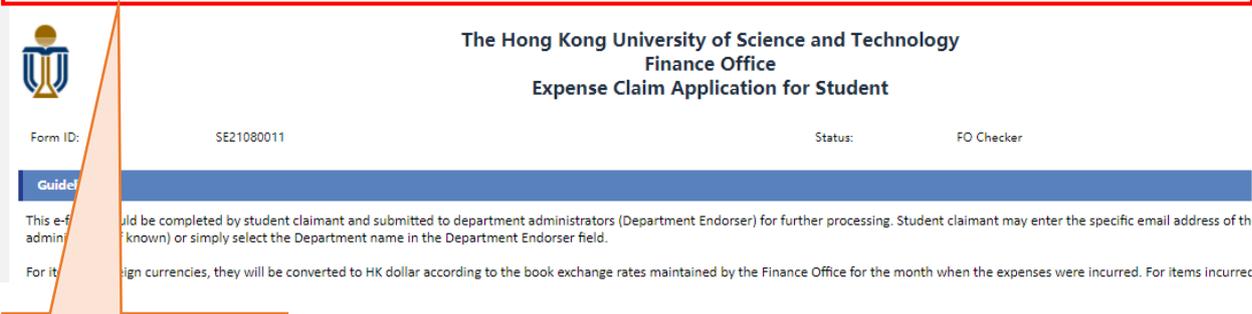
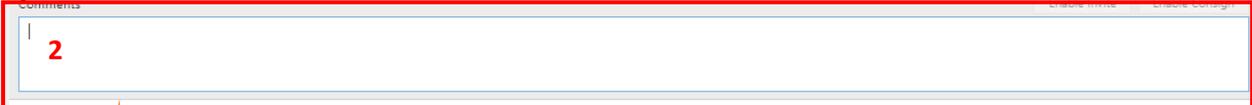
Department: ISO Student ID: isvts152

Submit To:  Department  Specific Endorser Contact Number:

User Acceptance, IS

## 6 Return the e-form to student to make amendment

Press the “Return to Requester” button if you want to return the e-form to student to correct any information or attach additional supporting documents



**The Hong Kong University of Science and Technology  
Finance Office  
Expense Claim Application for Student**

Form ID: SE21080011 Status: FO Checker

**Guideline**

This e-form should be completed by student claimant and submitted to department administrators (Department Endorser) for further processing. Student claimant may enter the specific email address of the administrator (if known) or simply select the Department name in the Department Endorser field.

For items in foreign currencies, they will be converted to HK dollar according to the book exchange rates maintained by the Finance Office for the month when the expenses were incurred. For items incurred...

**Header**

\* Denotes mandatory field

Requestor: User Acceptance - Student, IS Email: isvts152@connect.ust.hk

Department: ISO Student ID: isvts152

Submit To:  Department  Specific Endorser Contact Number:

User Acceptance, IS

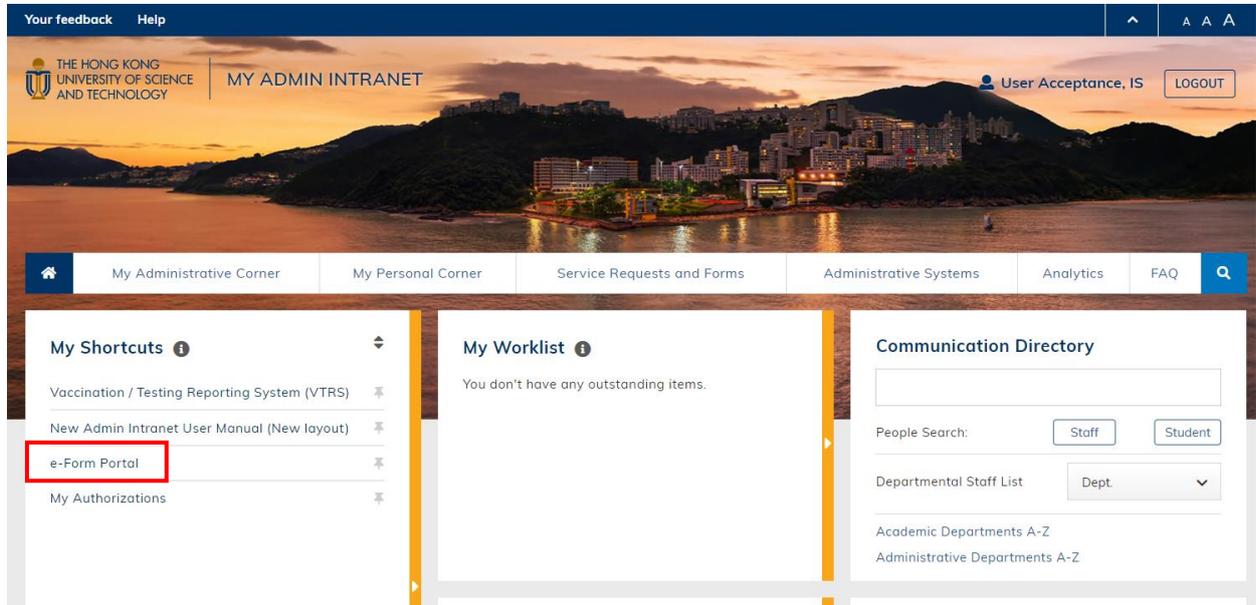
**Comments**

- Must input comments so that student knows what amendment is required

## Part 3 - User Guide for Budget Controlling Officer (BCO)

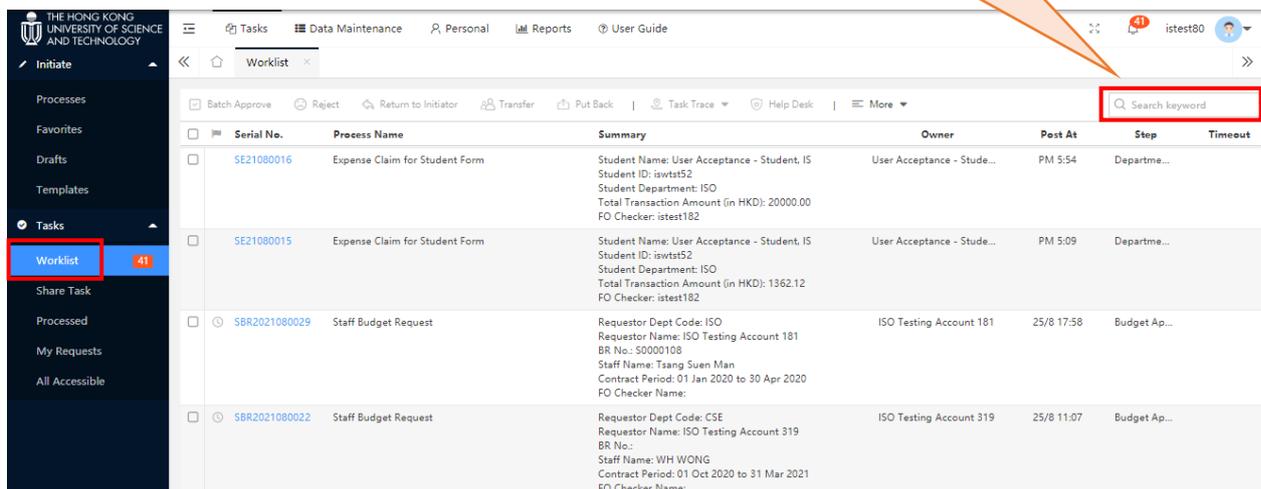
### 1 Access the e-form

My Admin Intranet (<https://my-ai.ust.hk/>) > My Shortcuts > e-Form Portal

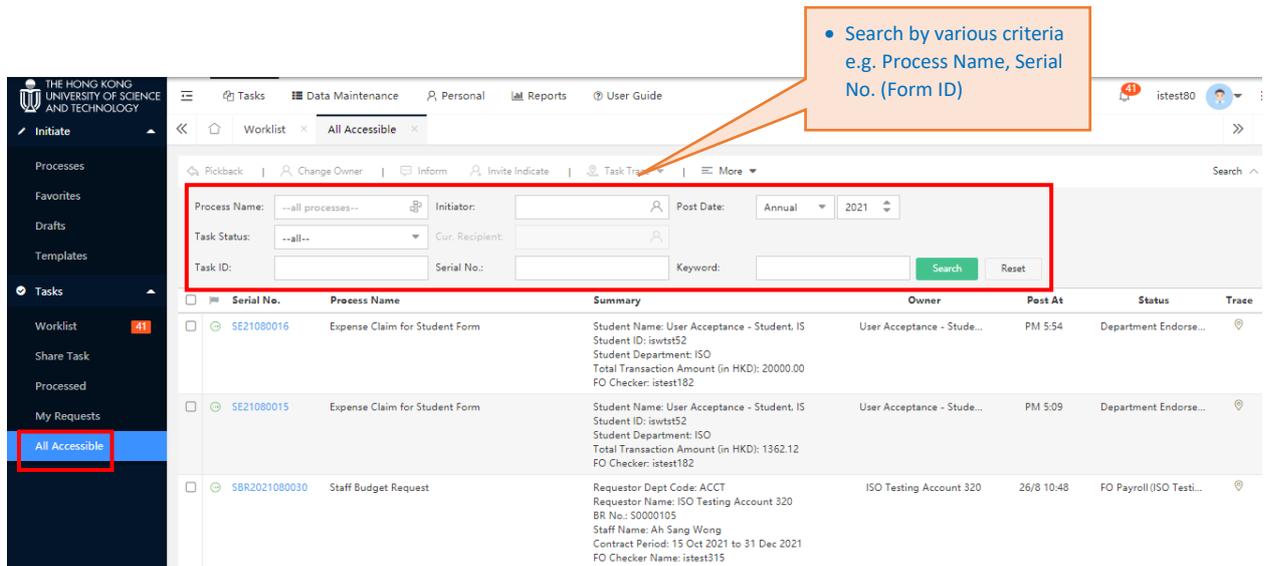


Go to "Worklist" to see the e-forms pending for your action

- Can type key words to search the required e-form



Go to "All Accessible" to view all e-forms for which you have the access rights (But cannot take action on e-form if select via here)



## 2 Email Notification

BCO will receive email notification when student submitted the e-form for his/her approval

Endorsement is Requested for Expense Claim for Student eForm - SE21080015

no-reply@ust.hk  
Fri 8/27/2021 8:25 PM  
Inbox

To: IS User Acceptance;

Action Items + Get more apps

Dear User Acceptance, IS,  
Please endorse the following Request for Expense Claim for Student eForm:

**Student Name:** User Acceptance - Student, IS  
**Student Email:** iswtst52@connect.ust.hk  
**Student Department:** ISO  
**Total Transaction Amount (in HKD):** 1362.12  
**Expense particulars:** Go to xxx to collect samples for research.. To present research paper ....

You can endorse the Request for Expense Claim for Student eForm directly at:  
<https://admm65.ust.hk/YZSoft/forms/Process.aspx?pid=511844&tid=29037>

You can also follow up or view this request by accessing eForm Systems and then go to Worklist:  
<https://admm65.ust.hk/>

Please take appropriate follow-up action.

For user guide, please visit link below:  
[https://gohkust.sharepoint.com/:b/s/FO/fowebpage/EWTdoON02TpOpCz21\\_Bjb7wB4sU\\_a-5GanhgcepKCESISA?e=AeAUE4](https://gohkust.sharepoint.com/:b/s/FO/fowebpage/EWTdoON02TpOpCz21_Bjb7wB4sU_a-5GanhgcepKCESISA?e=AeAUE4)

\*\*\*\*\*  
 This is a system-generated email.  
 \*\*\*\*\*

## 3 Approve the e-form

Press the “Approve” button at the top left-hand corner of the e-form to send the e-form to Finance Office to arrange payment

The screenshot shows the top navigation bar of the application. The 'Approve' button is highlighted with a red box. Other buttons include 'Return to Endorser', 'Reject', 'Return to Initiator', 'Save', 'Task Trace', and 'More'. Below the navigation bar is the university logo and the title 'The Hong Kong University of Science and Technology Finance Office Expense Claim Application for Student'. The form ID is SE21080015 and the status is BCO Approver. A 'Guideline' section provides instructions for completing the form. A 'Header' section contains form fields for 'Requestor', 'Department', 'Submit To', 'Email', 'Student ID', and 'Contact Number'.

#### 4 Return the e-form to Department Endorser to make amendment

Press the “Return to Endorser” button if you want to return the e-form to Department Endorser to correct any information or attach additional supporting documents

This screenshot shows the same form as above, but with annotations. A red box labeled '3' highlights the 'Return to Endorser' button in the navigation bar. A red box labeled '1' highlights the 'Comments' button in the top right corner. A large red box labeled '2' encompasses the 'Comments' input area. An orange callout box points to the 'Comments' area with the text: 'Must input comments so that Department Endorser knows what amendment is required'. The 'Approve' button is also visible in the navigation bar.

- End -