[Company name]

*How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue **[field]** until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.*

Expense Claim Form

Claiming expenses without back-and-forth: what was spent, why, receipts attached, and approval, in one form.

Document	Expense Claim Form
Prepared by	**[Name and role]**
Owner	**[Name and role]**
Version	2.0
Date	**[DD Month YYYY]**
Review date	**[DD Month YYYY]**

Claimant details

Employee	**[Employee name]**
Employee ID	**[Employee ID]**
Department	**[Department]**
Manager	**[Manager name]**
Claim period	**[Claim period]**
Payment method	**[Payment method]**

Expense items

Date	Description	Category	Amount

[Company name]

Date	Description	Category	Amount

Mileage

Date	From	To	Miles	Rate per mile	Amount

Receipts attached

Attach a receipt for every item over the receipt threshold. Items without receipts are not reimbursed.

Expense date	Description	Receipt attached?	Receipt reference

[Company name]

Expense date	Description	Receipt attached?	Receipt reference

Approval

Approved by	[Manager name]
Decision	Approved / Approved in part / Refused
Approved amount	
Reason for any reduction	
Signature and date	

Payment details

Claim reference	
Checked by	
Paid on	
Payment reference	
Payment method	[Payment method]

Checklist

Done	Check
	Every expense has a date, category, amount, and a receipt attached.
	Mileage is calculated at the agreed rate with from/to locations.
	The claim is approved before payment, and the payment reference is recorded.