[Company name]

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Expense Claim Form

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

Document: Expense Claim Form **Version:** 2.0
Prepared by: _____ **Owner:** _____
Date: _____ **Review date:** _____

Claimant details
Employee name: _____ **Employee ID:** _____
Department: _____ **Manager name:** _____
Claim period: _____ **Payment method:** _____

Expense items
(1) **Date:** _____ **Description:** _____ **Category:** _____ **Amount:** _____
(2) **Date:** _____ **Description:** _____ **Category:** _____ **Amount:** _____
(3) **Date:** _____ **Description:** _____ **Category:** _____ **Amount:** _____
(4) **Date:** _____ **Description:** _____ **Category:** _____ **Amount:** _____

Mileage
(1) **Date:** _____ **From:** _____ **To:** _____ **Miles:** _____ **Rate per mile:** _____ **Amount:** _____
(2) **Date:** _____ **From:** _____ **To:** _____ **Miles:** _____ **Rate per mile:** _____ **Amount:** _____
(3) **Date:** _____ **From:** _____ **To:** _____ **Miles:** _____ **Rate per mile:** _____ **Amount:** _____
(4) **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.
(1) **Expense date:** _____ **Description:** _____ **Receipt attached:** _____ **Receipt reference:** _____
(2) **Expense date:** _____ **Description:** _____ **Receipt attached:** _____ **Receipt reference:** _____
(3) **Expense date:** _____ **Description:** _____ **Receipt attached:** _____ **Receipt reference:** _____
(4) **Expense date:** _____ **Description:** _____ **Receipt attached:** _____ **Receipt reference:** _____

Approval
Approved by: _____ **Approved amount:** _____
Decision: Approved / Approved in part / Refused
Reason for any reduction: _____
Signature and date: _____

Payment details
Claim reference: _____ **Checked by:** _____
Paid on: _____ **Payment reference:** _____
Payment method: _____

Checklist
[ ] 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.