

## Expense Claims

A guide for staff and approving partners

Kelly Partners · September 2026

The expense claim form is now online. It replaces the spreadsheet *K+P form - expense claim for other expenses.xls*, and it does the parts of that form people used to get wrong: it adds up, it works out the GST, it keeps the receipts attached to the right lines, and it sends the finished claim to the right office by itself.

Where **<https://expenseclaim.kellypartners.com.au>**

Sign in Your Microsoft work account — the same one as Outlook

Who Anyone who spends their own money on the firm's behalf, and any Client Director or partner who approves it

### How it works, in three lines

1. You fill in the claim, attach a receipt to every line, and sign.
2. Your approver gets an email, reads the claim and the receipts, and signs.
3. The signed form and every receipt go to your office's Lightyear inbox as one PDF.

Nothing reaches the office until **both** signatures exist. Until then the claim is yours to change or withdraw.

## Part 1 — Making a claim

### 1. Choose your office

This is the one thing worth getting right first. The office you pick decides where the finished claim is sent — each office has its own Lightyear inbox, and the portal knows all 36 of them. If you pick the wrong office the claim goes to the wrong place.

### 2. Your details and the period

Your name and email come from your sign-in. Set the period to cover the dates you are claiming for, and name the Client Director or partner who will approve it. They must be someone other than you.

### 3. Add each expense

One line per receipt. Say what the expense was actually for — "Client lunch with the ACME board ahead of the FY27 planning day" is useful to whoever codes it later; "lunch" is not. For travel, include the travel diary details here.

#### The amount and the GST

**Enter the amount exactly as it appears on the receipt, GST included.** Then choose the GST treatment and the portal works the GST out. It is recorded for coding only and is never added to what you are paid.

Choose

When

GST

|                          |                                                                            |                                         |
|--------------------------|----------------------------------------------------------------------------|-----------------------------------------|
| <b>GST 10%</b>           | A normal Australian purchase                                               | 1/11 of the amount, calculated for you  |
| <b>GST free / no GST</b> | Anything bought overseas, bank fees, most government charges               | Nil                                     |
| <b>Part GST</b>          | A receipt with GST-free items mixed in — a supermarket docket, a café bill | You type the GST printed on the receipt |

**If you are unsure, the receipt itself almost always says.** Look for a "Total GST" line, or a # or \* against the taxable items.

2 Receipt 2

\$1,440.00 Duplicate Remove

Date \*

Category \*

Client / matter

10/09/2026

Professional Mem

If chargeable to a client

What was it for? \*

CA Program Financial Reporting module enrolment

Amount on the receipt (GST inclusive) \*

GST treatment \*

GST — 1/11, calculated

\$ 1440.00

GST 10% - GST is 1/11 of the amount

\$ 130.91

Also attach: The signed CA Program Study Leave & Reimbursement Policy & Form.

Attach it to this line along with the receipt — more than one file is fine.

Receipt \*

Add another file for this line, or drop it here

ca-program-invoice.jpg x study-leave-form.jpg x

One expense line. The GST was calculated from the amount; the two files attached to it are the invoice and the signed study leave form.

#### 4. Attach a receipt to every line

A photo or a PDF. Photos from an iPhone are fine — they are converted for you. Drop more than one file on a line whenever a single receipt is not the whole story.

**Professional memberships and examinations need a second document.** If you choose that category, the portal will remind you to attach the **signed CA Program Study Leave & Reimbursement Policy & Form** as well as the invoice. Your approver is asked to confirm it is there before they sign.

#### 5. Check the totals, then sign

The totals are calculated from your lines — there is nothing to add up and nothing to type twice.

|                             |                      |                       |
|-----------------------------|----------------------|-----------------------|
| TOTAL CLAIM (GST INCLUSIVE) | GST INCLUDED IN THAT | AMOUNT PAYABLE TO YOU |
| <b>\$1,768.40</b>           | <b>\$156.11</b>      | <b>\$1,768.40</b>     |

Totals for the example claim. GST is shown for coding; it is not added to the amount you are paid.

Sign in the box with a mouse, trackpad or finger, and submit. Your approver is emailed straight away.

## After you submit

|                   |                                                                                                                                         |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| Track it          | <b>My claims</b> shows everything you have lodged and where each one has got to                                                         |
| Changed your mind | Withdraw it while it is still with your approver, change it, and submit again                                                           |
| Sent back         | If your approver or finance sends it back you are emailed the reason. The claim becomes editable again and nothing you attached is lost |

## Part 2 — Approving a claim

### 1. Open the email and sign in

You are emailed as soon as a claim is submitted. The email shows what is being claimed and carries a **Review and approve** button.

You will be asked to sign in with your Microsoft account. That is deliberate: the claim is emailed to the office **from you** when you approve it, and your approval is recorded against your verified identity rather than against whoever happens to hold the link.

### 2. Read what is being claimed

Every line is on the page — you do not have to open the PDF to see what you are approving. Each receipt is a link; click it to open it.

| WHAT IS BEING CLAIMED |            |                 |                                                                 |                                         |                 |                   |                                                                                |
|-----------------------|------------|-----------------|-----------------------------------------------------------------|-----------------------------------------|-----------------|-------------------|--------------------------------------------------------------------------------|
| #                     | DATE       | CLIENT / MATTER | WHAT IT WAS FOR                                                 | CATEGORY                                | GST INCL.       | AMOUNT            | RECEIPT                                                                        |
| 1                     | 03/09/2026 | ACME Pty Ltd    | Client lunch with the ACME board ahead of the FY27 planning day | Meals                                   | \$22.00         | <b>\$242.00</b>   | <a href="#">lunch-receipt.jpg</a>                                              |
| 2                     | 10/09/2026 | —               | CA Program Financial Reporting module enrolment                 | Professional Memberships / Examinations | \$130.91        | <b>\$1,440.00</b> | <a href="#">ca-program-invoice.jpg</a><br><a href="#">study-leave-form.jpg</a> |
| 3                     | 18/09/2026 | —               | Weekly groceries for the office kitchen                         | Other Expenses                          | \$3.20          | <b>\$86.40</b>    | <a href="#">grocery-docket.jpg</a>                                             |
| 3 lines               |            |                 |                                                                 |                                         | <b>\$156.11</b> | <b>\$1,768.40</b> | 4 receipts                                                                     |

Every Amount is the GST-inclusive total on the receipt. The GST column is the GST contained in it, for coding — it is not added to the claim. Click a receipt to open it.

The claim as the approver sees it. The full PDF, with every receipt, is further down the same page.

### 3. Check the paperwork

Where a claim includes professional memberships or examinations, a panel appears directly above your decision listing exactly what to confirm and what is attached.

**CHECK BEFORE YOU APPROVE**

**Line 2 — Professional Memberships / Examinations — \$1,440.00**  
CA Program Financial Reporting module enrolment  
Open the attachments and confirm the signed CA Program Study Leave & Reimbursement Policy & Form is there, signed.  
[ca-program-invoice.jpg](#) [study-leave-form.jpg](#)

**If it is not there, send the claim back — do not approve it.**  
Use 'Send back for changes' below and say the signed form is missing. The claimant can attach it and resubmit; nothing is lost. Approving without it commits the office to paying a claim it cannot support.

The portal can count the files on a line but cannot read them. Only you can confirm the right document is there.

## 4. Approve, adjust, or send it back

**YOUR DECISION**

Your name (as it will print) \*

Trevor Mok

Adjustment — reduce the claim by

\$ 0.00

Leave at 0.00 to approve the claim in full.

Reason for the adjustment

Required if you enter an adjustment

Your signature \*

Clear

Sign with a mouse, trackpad or finger.

On signing, the claim and all receipts are emailed as one PDF to the office's Lightyear inbox, with the claimant copied.

Approve & send

Send back for changes

**Approve** Sign and the claim goes to the office. You may reduce the amount first by entering an adjustment and a reason — both appear on the claim

**Send back** Give the claimant a reason. They are emailed, the claim becomes editable again, and it returns to you when they resubmit

On approval, the signed form and every receipt are emailed to the office's Lightyear inbox as a single PDF, **from your mailbox**, copying the claimant. You will find it in your Sent Items.

## The worked example

The claim shown throughout this guide. Three lines, deliberately chosen because each one is treated differently for GST.

| What                                                              | Category                                   | Treatment | Amount            | GST             |
|-------------------------------------------------------------------|--------------------------------------------|-----------|-------------------|-----------------|
| Client lunch with the ACME board                                  | Meals                                      | GST 10%   | \$242.00          | \$22.00         |
| CA Program module enrolment<br>invoice + signed study leave form  | Professional Memberships /<br>Examinations | GST 10%   | \$1,440.00        | \$130.91        |
| Weekly groceries for the office<br>kitchen<br>some items GST free | Other Expenses                             | Part GST  | \$86.40           | \$3.20          |
| <b>Total claimed, GST inclusive</b>                               |                                            |           | <b>\$1,768.40</b> | <b>\$156.11</b> |

The groceries are the interesting one. \$86.40 is neither GST-free nor 1/11 — part of the docket was taxable and part was not, so the GST printed on it, \$3.20, is what goes on the claim. Choosing "GST 10%" there would have claimed \$7.85 of GST the firm is not entitled to.

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## Quick answers

|                                   |                                                                                                                                                                             |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| I cannot sign in                  | Almost always means your account has not been added to the portal's access group yet. Ask finance at <b>kphkfinance@kellypartners.com.au</b> and they will have IT add you. |
| Can I claim for someone else?     | No. A claim belongs to whoever is signed in.                                                                                                                                |
| I have lost the receipt           | Every line needs one. Ask the supplier for a copy; a bank statement line on its own is not a receipt.                                                                       |
| Do I still email anything?        | No. Do not email the claim or the receipts to the office — the portal does it, once, with everything attached.                                                              |
| Can I fix a claim after approval? | Ask finance at <b>kphkfinance@kellypartners.com.au</b> . They can send it back to you or void it, and both are recorded. Nothing can be edited quietly.                     |
| Who sees my receipts?             | You, your approver, the office's Lightyear inbox, and finance administrators. Every administrator's view of a claim is logged.                                              |

Questions, or an office or category that is missing — contact the Hong Kong finance team at **kphkfinance@kellypartners.com.au**.