KELLY+PARTNERS
ACCOUNTANTS

Expense Claims and Credit Cards

A guide for staff, cardholders and approving partners

Kelly Partners · November 2026

The expense claim form is 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 or VAT, it keeps the receipts attached to the right lines, and once the claim is approved it passes it to your office for payment by itself. Parts 1 and 2 cover claims; Part 3 covers the firm's credit cards.

Where	**https://expenseclaim.kellypartners.com.au** for expense claims **https://expenseclaim.kellypartners.com.au/cards/** for credit card transactions
Sign in	Your Microsoft work account — the same one as Outlook
Who	Anyone who spends their own money on the firm's behalf, any partner or department head who approves it, and every holder of a firm credit card
Where it applies	All 34 offices — Australia and the United Kingdom. The form changes currency and tax to match the office you pick

How a claim works, in three lines

1. You fill in the claim, attach a receipt to every line, choose your approver 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 as one PDF, ready to be paid.

> Nothing reaches your 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 three things: **which office** pays the claim, **who you can choose** to approve it, and **which categories** you are offered. Pick the wrong office and the claim is approved by the wrong people and paid by the wrong company.

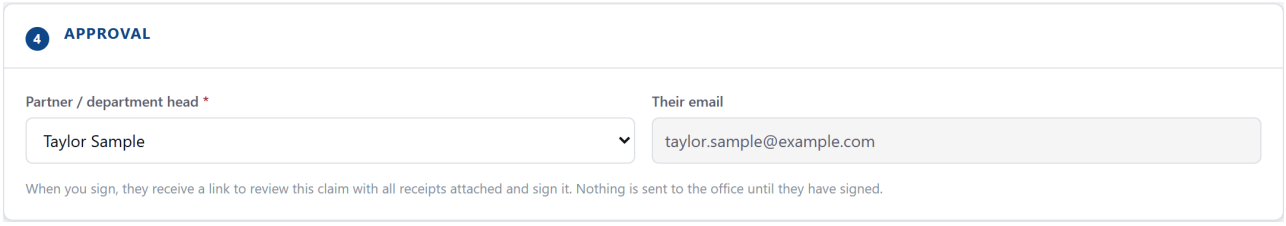
> **It also sets the currency and the tax — GST in dollars for an Australian office, VAT in pounds for Kudos.** There is nothing to set: choose the office and the rest of the form follows.

2. Your details, the period and your approver

Your name and email come from your sign-in. Set the period to cover the dates you are claiming for.

Choose your approver from the list — you cannot type one in. The list is your office's partners (for Group Holdings, its department heads). You are never on your own list: if you are your office's only partner, your claim goes to the CFO.

No one approves their own claim — and if a colleague prepared the claim for you (see *Someone can prepare your claim*), they cannot approve it either. Choose someone else.



The approver is picked, not typed. Their email fills itself in.

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 category

Choose the closest category from the list. It decides how the expense is coded in the accounts, and it is the same list the corporate card portal uses. You are only offered the categories your office uses.

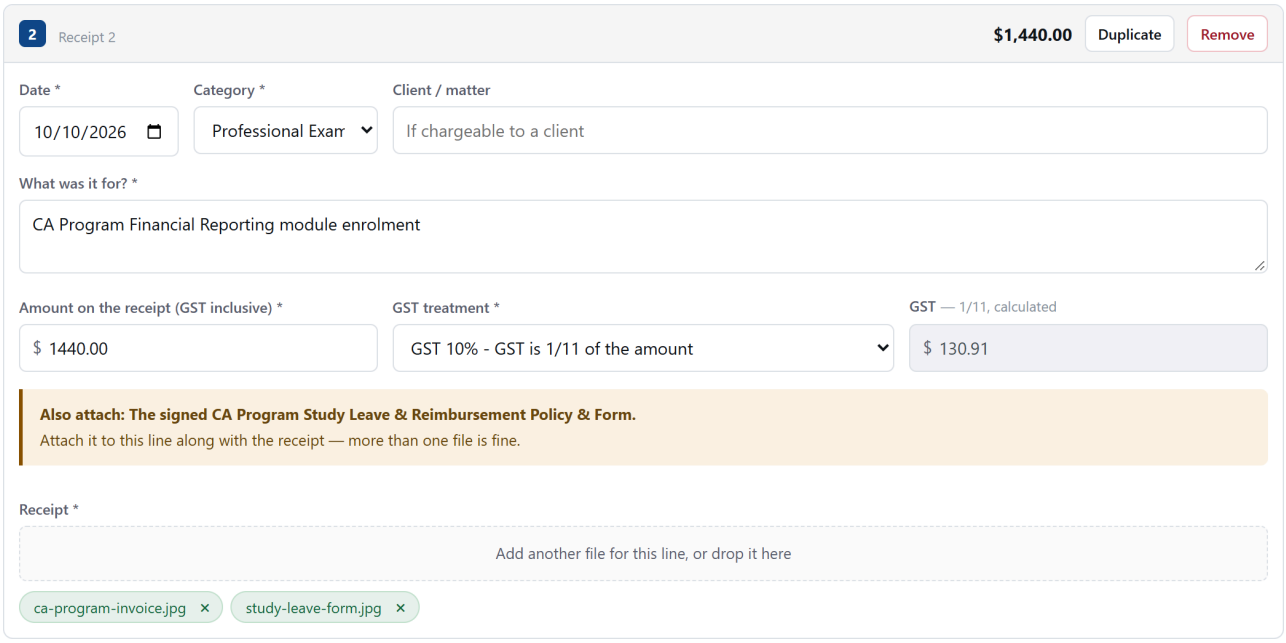
> **Car kilometres are not an expense claim.** If you choose **Fuel**, the portal reminds you: kilometre claims go through payroll in the monthly payroll cycle — contact **payroll@kellypartners.com.hk**. Fuel you paid for yourself, such as for a hire car, is still claimed here.

The amount and the tax

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

Whichever country you are in, there are only ever three kinds of answer:

Choose	When	What the portal does
A rate	A normal purchase, taxed at one of your country's rates	Works the tax out of the amount for you
No tax	**GST free** (basic food, medical, education) or **No GST** (overseas, bank fees, government charges)	Nil
Part	One receipt with taxed and untaxed items on it — a supermarket docket, a café bill	You type the tax printed on the receipt



One expense line, on an Australian claim. The GST was calculated from the amount; the two files attached to it are the invoice and the signed study leave form. On a Kudos claim the same line reads VAT, in pounds.

The rates, by country

You are only ever shown your own office's rates, so this is for reference.

Where	Offices		Tax	You can choose	Part up to
Australia	33 offices	$	GST	GST 10% · GST free · No GST · Part GST	1/11
United Kingdom	Kudos	£	VAT	Standard 20% · Reduced 5% · Zero-rated, exempt or no VAT · Part VAT	1/6

> **If you are unsure, the receipt itself almost always says.** Look for a "Total GST" or "VAT" line, or a **#** or ***** against the taxable items. The portal will not accept more tax than the top rate allows.

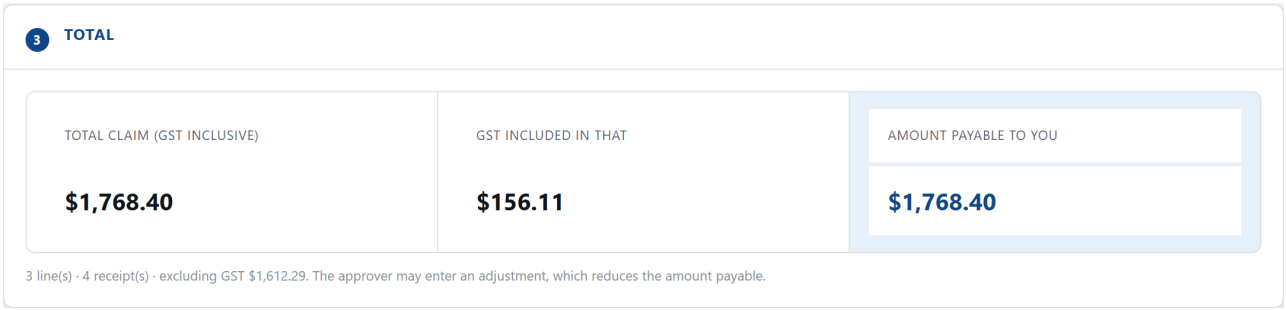
4. Attach a receipt to every line

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 Professional Examinations need a second document.** If you choose either 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.



Totals for the example claim, an Australian one. The tax is shown for coding; it is not added to the amount you are paid.

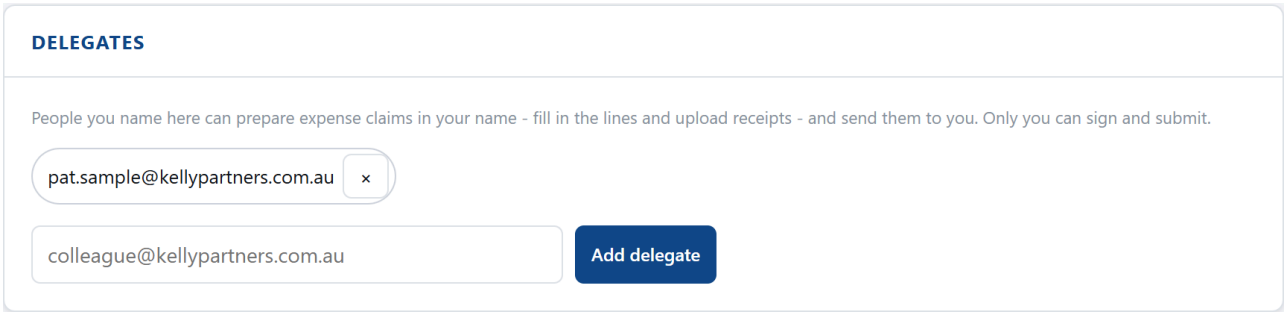
Sign in the box with a mouse, trackpad or finger, and submit. Your approver is emailed straight away.

After you submit

Track it	**My claims** 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
Getting paid	Your office pays the approved claim. Staff are paid into the bank account payroll holds for them in Employment Hero — if yours has changed, update it there

Someone can prepare your claim

A colleague — an assistant, say — can fill in a claim for you. On **My claims**, open **Delegates** and add their work email.



Your delegates, on My claims. Press × to remove one.

Your delegate starts a new claim and chooses you under **Claim for**. They add the lines and the receipts, then press **Send to <your first name> to sign**. You are emailed a link: open the claim, check it, choose your approver, sign and submit it as usual.

> Only you can sign your claim, and nothing goes to your approver until you do. The colleague who prepared it cannot be its approver.

Part 2 — Approving a claim

1. Open the email and sign in

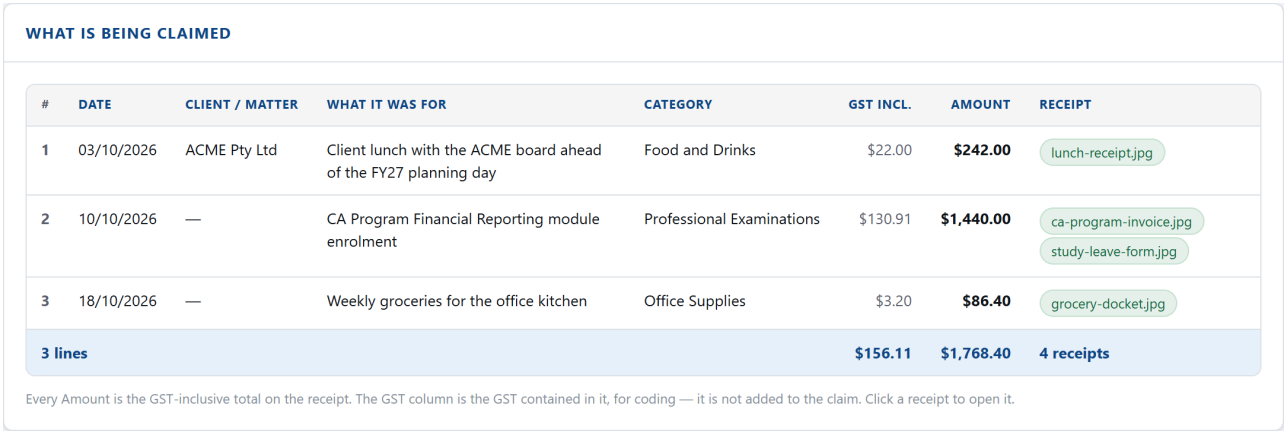
You are emailed as soon as a claim is submitted to you. The email shows what is being claimed and carries a **Review and approve** button.

You will be asked to sign in with your Microsoft account. That is deliberate: your approval is recorded against your verified identity rather than against whoever happens to hold the link.

You cannot approve your own claim, or one you prepared as someone's delegate — the portal refuses both.

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

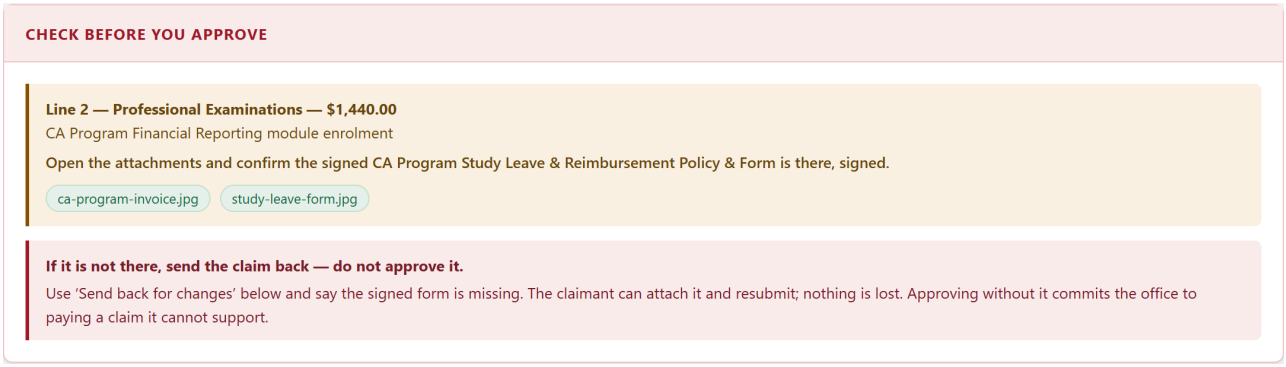
#	DATE	CLIENT / MATTER	WHAT IT WAS FOR	CATEGORY	GST INCL.	AMOUNT	RECEIPT
1	03/10/2026	ACME Pty Ltd	Client lunch with the ACME board ahead of the FY27 planning day	Food and Drinks	$22.00	**$242.00**	lunch-receipt.jpg
2	10/10/2026	—	CA Program Financial Reporting module enrolment	Professional Examinations	$130.91	**$1,440.00**	ca-program-invoice.jpg study-leave-form.jpg
3	18/10/2026	—	Weekly groceries for the office kitchen	Office Supplies	$3.20	**$86.40**	grocery-docket.jpg
3 lines					**$156.11**	**$1,768.40**	**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.

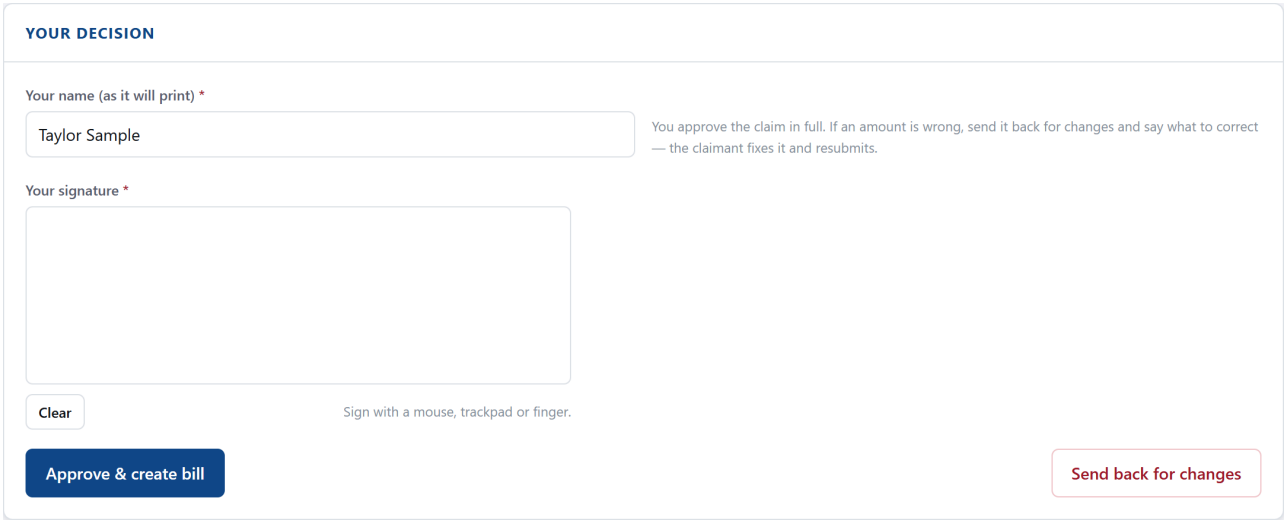
3. Check the paperwork

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



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

4. Approve or send it back



Approve	Sign, and the claim goes to the office for payment in full. The claimant is emailed a copy
Send back	Give the claimant a reason. They are emailed, the claim becomes editable again, and it returns to you when they resubmit

> **If an amount is wrong, send the claim back** and say what to correct — a personal item to remove, a receipt that does not match. You cannot reduce a claim yourself; the claimant fixes it and resubmits, so the claim and its receipts always agree.

The worked example

The claim shown throughout this guide. Three lines, deliberately chosen because each one is treated differently. **It is an Australian claim**, so it is in dollars with GST treatments; a Kudos claim works identically in pounds.

What	Category	Treatment	Amount	GST
Client lunch with the ACME board	Food and Drinks	GST 10%	$242.00	$22.00
CA Program module enrolment invoice + signed study leave form	Professional Examinations	GST 10%	$1,440.00	$130.91
Weekly groceries for the office kitchen some items GST free	Office Supplies	Part GST	$86.40	$3.20
Total claimed, GST inclusive			**$1,768.40**	**$156.11**

> 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.

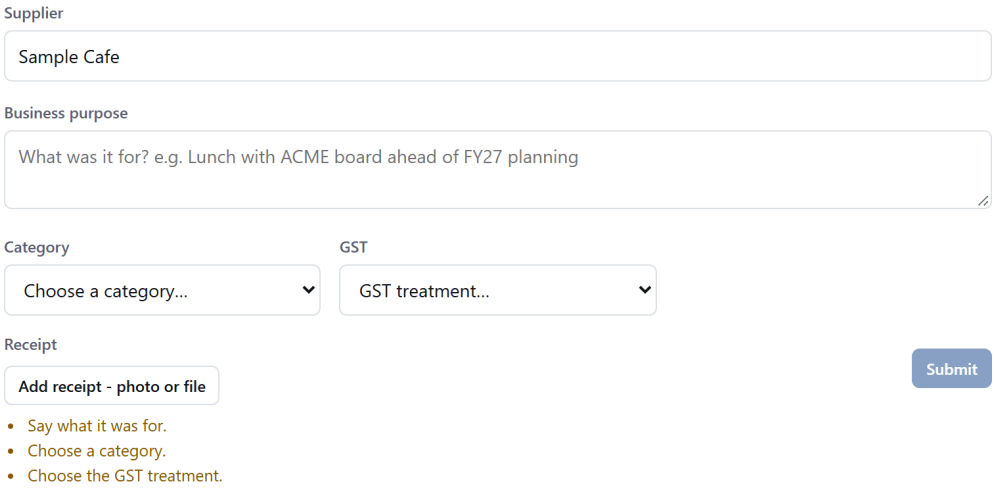
Part 3 — Your firm credit card

Every purchase on a firm credit card appears in the card portal a day or two after you pay. There is no claim form and no approver: you complete each card line yourself and submit it, and it is recorded in Xero straight away.

Where	**https://expenseclaim.kellypartners.com.au/cards/**
For each line	Attach the receipt, check the supplier, say what it was for, choose the category and the GST, and press **Submit**. The supplier starts the line's description in Xero, so spending can be found by supplier
The deadline	Upload each receipt within a month of the line appearing — the date is shown on the line. A purchase with no receipt by then is recorded as your drawings
Westpac cards	Show purchases made from 1 November 2026
Personal by mistake	Do not submit it — tell finance

$82.50 or less: receipt not mandatory

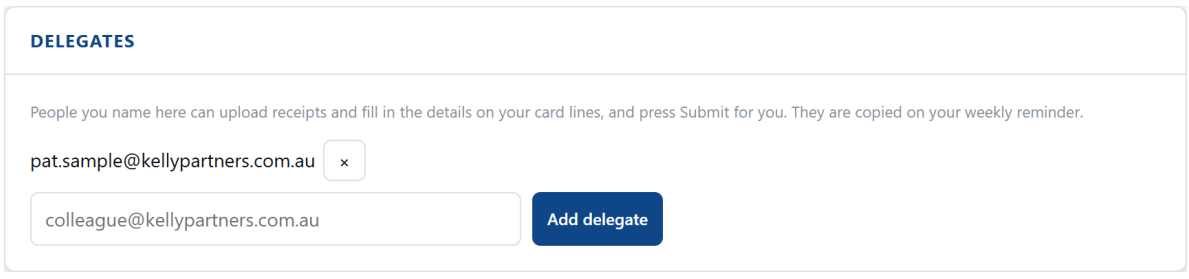
For a purchase of **82.50 or less**, in your card's own currency, a receipt is not mandatory — the line can be submitted without one, and you can still attach it if you have it. Everything else is the same: say what it was for, choose the category and the GST, and submit it by the date shown on the line.



A $12.50 café purchase. The to-do list asks for the purpose, the category and the GST; the receipt is not mandatory.

Someone can do your card lines for you

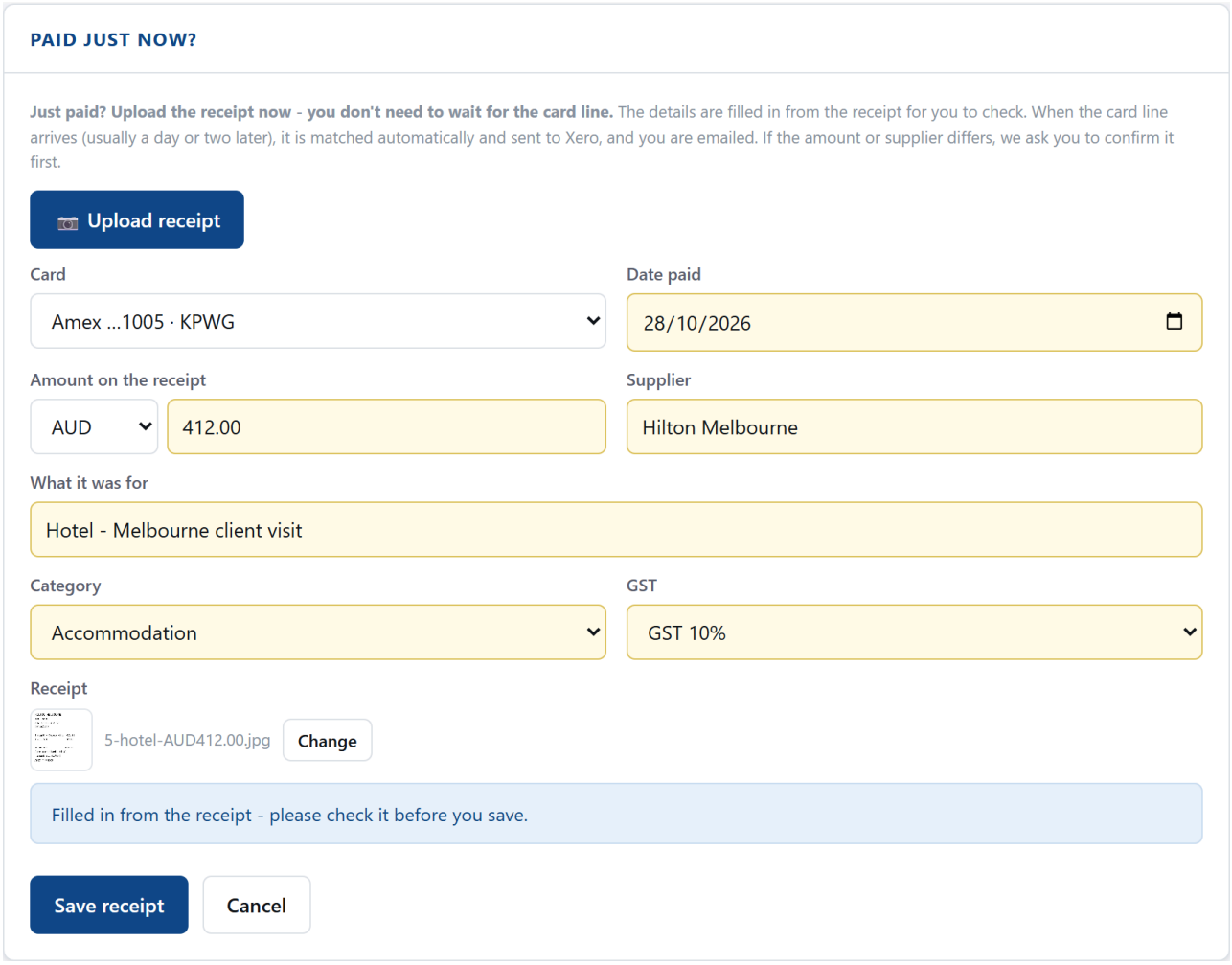
On the card page, open **Delegates** and add a colleague's work email. They can upload receipts, fill in the details and press Submit on your card lines, and they are copied on your weekly reminder.



Paid just now? Add the receipt straight away

You do not have to wait for the card line. Straight after paying, open the card page and press **Upload receipt** under **Paid just now?** — photograph the receipt, or choose a PDF.

The form then opens with the date, the amount and its currency, the supplier, what it was for, the category and the GST filled in from the receipt — the boxes it filled are shown in yellow. **Check them, and the card, before you save**: the reader is good, not perfect, and whatever you save is what goes to Xero. Press **Save receipt**; the pop-up asks you to confirm it was business spending, not personal.



A hotel receipt, read and filled in. Change anything that is wrong, then press Save receipt.

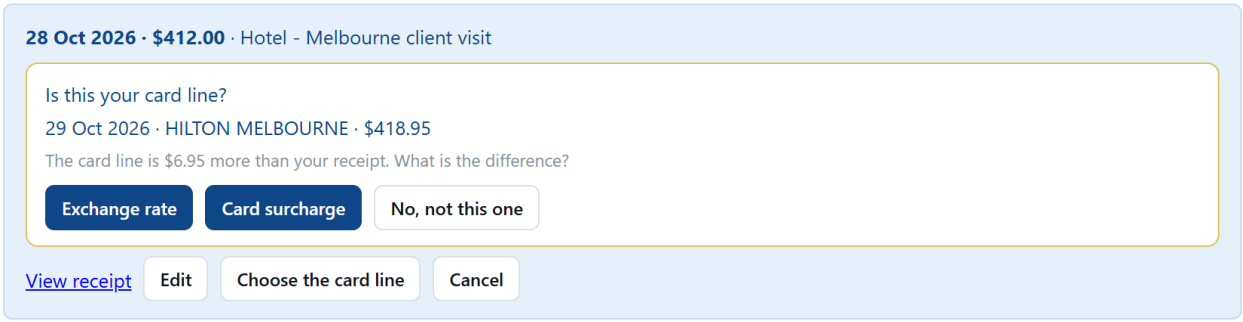
When the card line arrives

Same amount, same supplier: sent by itself. When the card line has exactly the amount on your receipt and the same supplier, and your details are complete, the portal puts the receipt on the line and sends it to Xero. You are emailed *Matched and sent to Xero* — if it is the wrong line, reply to that email or tell finance.

Otherwise you confirm it. If the supplier is not clearly the same, or two receipts could fit, the portal asks you on the card page and by email. Press **Yes, match it** — or **No, not this one** if it is a different purchase. If anything is still missing, the portal says what to finish.

A small difference

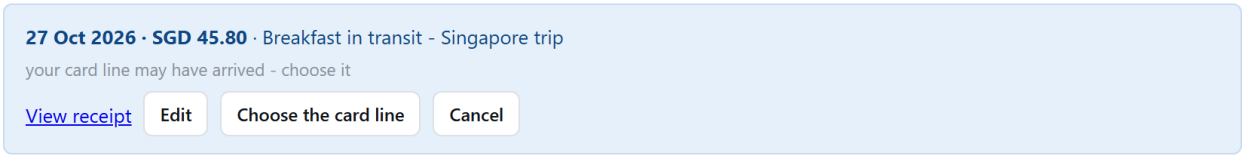
If the card line is a little more or less than your receipt — an exchange rate, or a card surcharge — it is still offered. Say which it was: press **Exchange rate** or **Card surcharge**. The card amount is what goes to Xero, and the difference is coded the same way as the purchase.



The hotel charged $6.95 more than the receipt: a card surcharge.

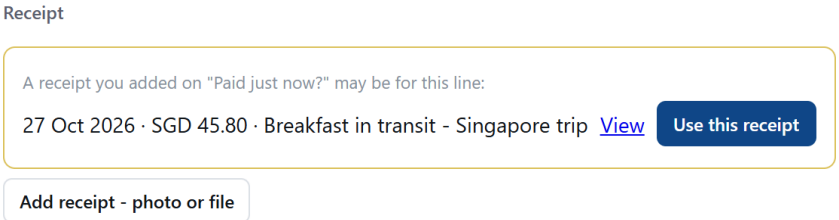
A receipt in another currency

When the receipt is in another currency the amounts cannot agree, so you choose the line yourself. Once card lines that might be it have arrived, the receipt says so and you are emailed. Press **Choose the card line**, pick it and press **This one**; the portal asks you to confirm before it matches.



Or start from the card line

Open a card line and, if a receipt you added may be its own, the line shows it. Press **Use this receipt**.



> **Changed your mind?** Until the card line is submitted you can **Edit** a waiting receipt, or **Undo match** on a matched one and match it again. Once the line is submitted, the receipt leaves the list.

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 **kphkfinance@kellypartners.com.au** and they will have IT add you.
My approver is not in the list	The list is your office's partners. Check you chose the right office; if the list itself is wrong, tell finance at **kphkfinance@kellypartners.com.au**.
The category I need is not there	Choose the closest one and describe the expense properly. If a category is genuinely missing for your office, tell finance.
Can I claim car kilometres?	Not here. Kilometre claims go through payroll in the monthly payroll cycle — contact **payroll@kellypartners.com.hk**.
Can I claim for someone else?	You can prepare a claim for a colleague who has added you as a delegate — choose them under **Claim for**. Only they can sign and submit it, and you cannot approve it.
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.
My approver wants to change an amount	They send the claim back with a reason; you correct it and resubmit. Approvers cannot reduce a claim themselves.
Do I still email anything?	No. Do not email the claim or the receipts to the office — the portal passes them on, once, with everything attached.
When am I paid?	When your office pays approved claims. Staff are paid into the bank account held in Employment Hero.
Can I fix a claim after approval?	Ask finance at **kphkfinance@kellypartners.com.au**. 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, your office's finance team, and finance administrators. Every administrator's view of a claim is logged.
A card purchase was personal	Do not submit it. Tell finance at **kphkfinance@kellypartners.com.au**, who record it for you.
I have lost a card receipt	Ask the supplier for a copy. Over 82.50 a line with no receipt by the date shown is recorded as your drawings.
My card line has not appeared	Card lines take a day or two. Add the receipt under **Paid just now?** meanwhile — it is matched when the line arrives.

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