Approving Expense Claims

1. Overview

Once an expense claim is submitted by a user, the claim must be reviewed and approved by their Purchase Card Approver before it is complete. Purchase Card Approvers have a responsibility to review Purchase Card transaction acquittals, to ensure any transactions identified as not allowed are recorded as personal expenditure, approve the acquittal, and ensure repayment by the Purchase Cardholder of personal expenditure. Purchase Card Approvers must ensure all transactions are consistent with University Purchase Card Policy, Procedure and Guidelines.

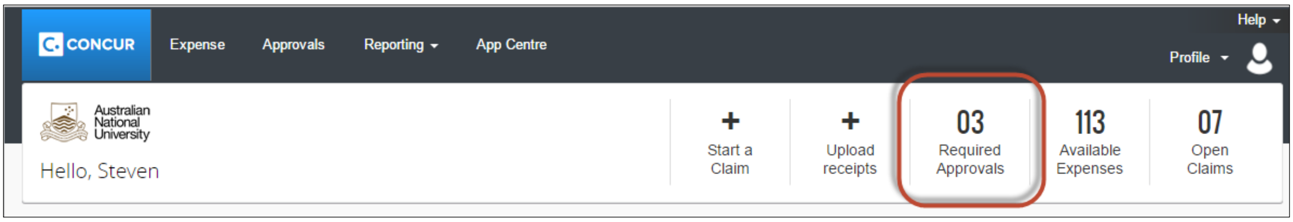
This guide will provide instructions on how to review, approve or send back an expense claim.

2. Accessing Claims Pending Approval

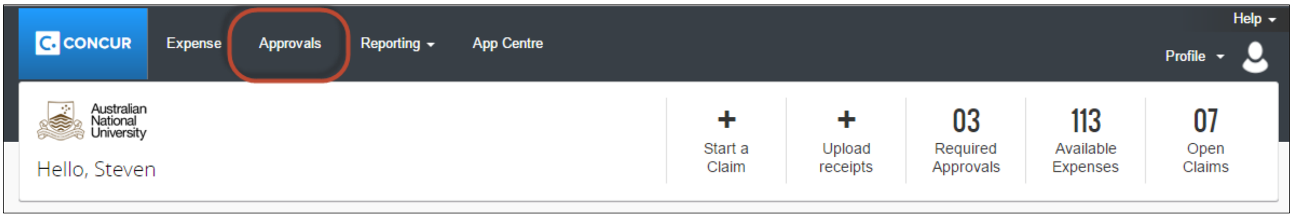
When the expense claim has been submitted, the approver will receive notification that the expense claim is ready for review and approval.

There are multiple ways of accessing the expense claim for review and approval:

1. **Required Approvals – Click Required Approvals**



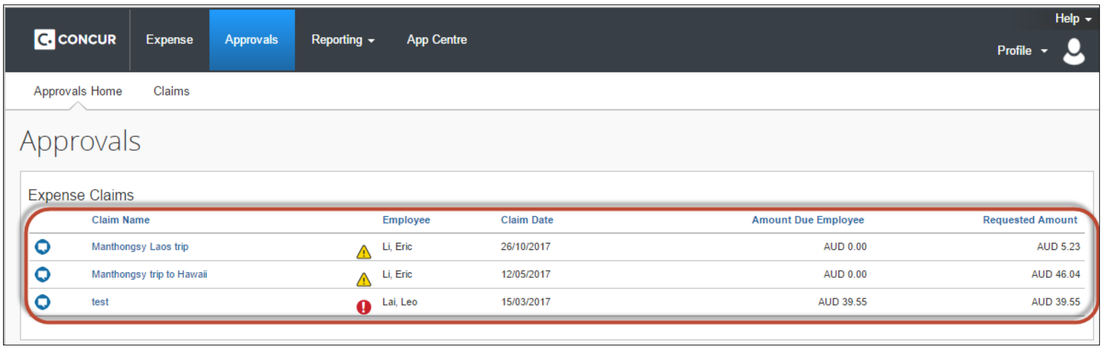
2. **Approvals – Click Approvals**



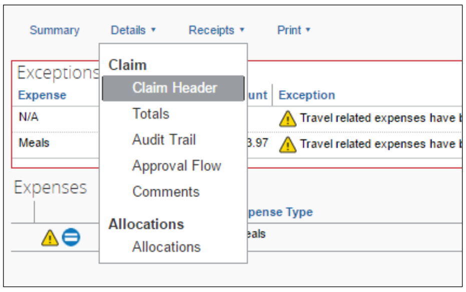
3. **My Tasks – Click Required Approvals**

3. Review Report Claim Header

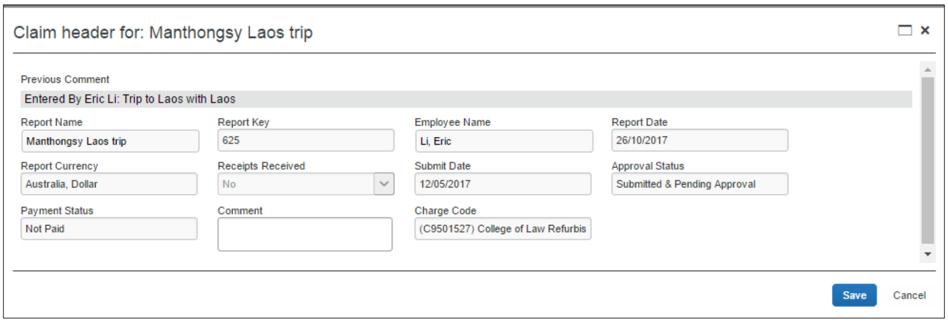
Expense Claims pending approval



1. Under Claim Name Click on the Link on the Expense Claim you want to review.
2. In the drop drown for Details, select Claim Header



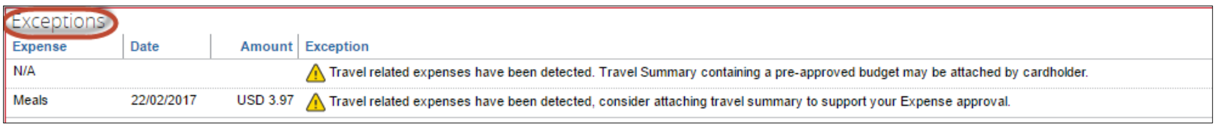
3. Review the details



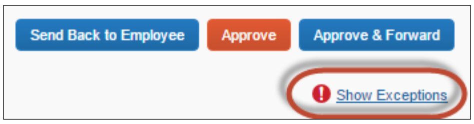
4. When the review is complete, Click Save or Cancel to return to Reports page

4. Review Exceptions

An exception is a warning or message to the person creating the expense claims, related to a specific entry they have made. Often, there is a message associated with an exception indicating the recommended action.

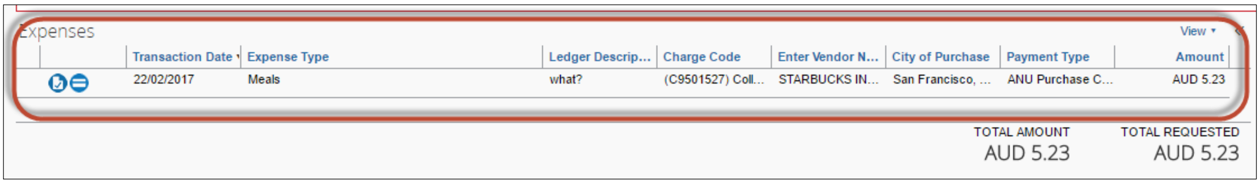


1. There is a Hide Exceptions/Show Exception link on the right side of the screen

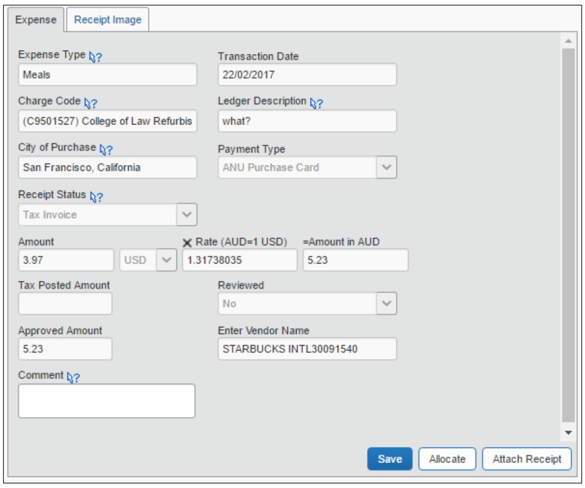


5. Review Detailed Expenses

1. On the left side of the Expense Claim, click on the line you want to review



2. On the Right hand side review the expense details

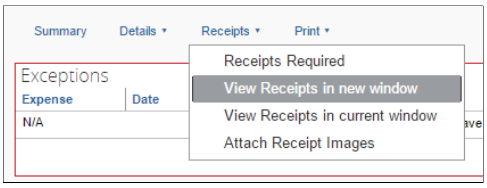


Note: Any additional information can be entered into comments field. If any changes are made click on 

3. Review the receipt for the expense:

   a. If there is a blue receipt icon , the receipt is attached directly to the expense, and you can view it by clicking on the Receipt Image tab.

   b. All other receipts on the claim can be reviewed by clicking the Receipts link located under the name of the Expense Claim and then selecting View Receipts.

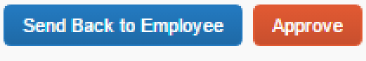


4. Confirm the charge code for the expense:

   a. Expenses that have been allocated to multiple charge codes can be reviewed by hovering over or clicking on the Full Allocation icon 

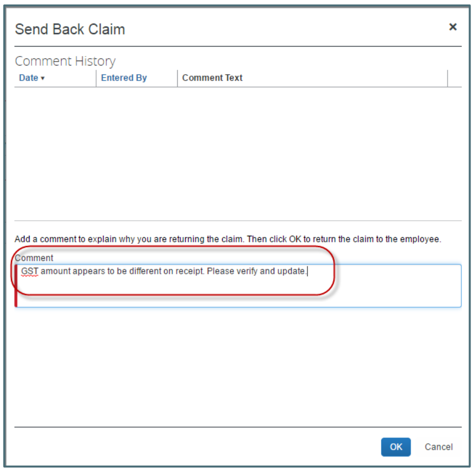
6. Approve or Send Back to User Expense Claim

Once the Expense Claim has been reviewed you have two options:



Send Back

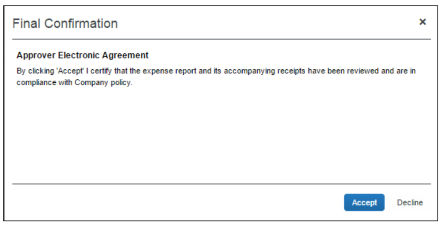
1. Select  if you require further information or there is a problem with the expense claim, such as incorrect charge code, or an expense not within policy, or if you just require any further clarification.
2. In the popup box, provide a description of why the expense claim has been sent back
   a. Example: GST amount appears to be different on receipt. Please verify and update.



3. Click 
4. The user will be notified of the expense claim being sent back for further clarification.

Approve

1. Click on 
2. Read the agreement and click  or Decline



Clicking on Accept will approve the Expense Claim and Clicking on Decline will just leave the Expense Claim as unapproved and will remain in your queue for approval

7. Additional Information

For additional information and user guides please visit the Concur Expense Management page:

https://services.anu.edu.au/information-technology/software-systems/concur-expense-management