**Amend an expense claim**

**Introduction**
This guide explains how to amend an expense claim.

A. Amend an expense claim in draft, or **before** it has been actioned by the Expense Approver (i.e. in the Expenses window).
B. Amend an expense claim in workflow, **after** it has been actioned by the Expense Approver (i.e. rejected and now in task manager).
C. Withdraw a whole expense claim

Expense claims can have three states. They can be amended while they are **Draft** or **In Progress**:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Expense claim has been saved but not yet submitted for approval</td>
</tr>
<tr>
<td>In Progress</td>
<td>Expense claim has been submitted for approval. Covers the period from submission to actual payment. Includes both those awaiting approval (by the Expense Approver or Payments Team), and those that have been approved by the Payments Team but not yet paid.</td>
</tr>
<tr>
<td>Completed</td>
<td>Expense claim fully approved and payment made.</td>
</tr>
</tbody>
</table>

**Audience**
Any employee who has incurred personal expenses in the course of their work for the College.

A. **Amend an expense claim in draft or before it has been actioned by the Expense Approver**

1. On the **Your employment** tab click **Start pages > Expenses**

2. In the **Expense overview** click the relevant state (Draft or In progress)

3. Select the claim from the list. The **Expenses** window opens.
To edit an expense item, click the line then make the changes (e.g. description, amount). To copy or delete an expense item, check the box on the left then click Copy expense or Delete expense.

Note: you can also add a new expense item if required.

To correct errors in receipts, click Show receipts.

Click Actions>Delete receipt.

Click Delete to confirm. You can then upload the correct receipt.

When you have finished making your changes click Send for approval.

What happens next?
The revised expense claim is routed to the Expense Approver for approval.

B. Amend an expense claim in workflow after it has been actioned by the Expense Approver (i.e. rejected and now in task manager)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Task icon in the toolbar and select the relevant task (Claimant to review and correct expense claim TransNo: 30000XXX). <strong>The Travel expenses approval</strong> window opens.</td>
</tr>
</tbody>
</table>

2. Review the Approver’s comment in the Workflow log.
3. To ADD a line:
   
a. Click **Add** in the **Expenses** section
   
   ![Add Expense](image1.png)
   
b. Enter the details in the blank **Expenses details** section below
   
   ![Expense Details](image2.png)
   
c. Click **Save**. The new line is submitted to the expense approver.

4. To AMEND a line:
   
a. Highlight the line in the **Expenses** section then amend the details in the **Expense details** section below (all fields other than **Tax system** are editable):
   
   ![Expense Details](image3.png)
   
b. In the **Expenses** section, check the box to select the line, then click **Approve**. The line is marked as "Approve"
   
   ![Expense Selection](image4.png)
   
c. Click **Save** at the bottom. The amended line is re-submitted to the Expense Approver.

![Save](image5.png)
5. **To DELETE a line**

   a. Highlight it in the Expenses section then click **Delete**.

   ![Expense Details](image)

   b. Click **Save** at the bottom. The line is deleted.

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**C. Withdraw a whole expense claim**

Follow these steps to withdraw an expense claim (i.e. the Expense Approver has rejected all the lines in the claim).

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Follow the steps to delete a line in the previous section.</td>
</tr>
<tr>
<td>2.</td>
<td>Delete all the lines in the expense claim.</td>
</tr>
<tr>
<td>3.</td>
<td>Click <strong>Save</strong>.</td>
</tr>
</tbody>
</table>

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**What happens next?**

When you delete all lines in the expense claim, the claim is posted for payment as a £0.00 amount.

![Mass Posting Travel Invoices](image)

There is no approval required. The claim remains **In Progress** until the next payment run, at which point the status changes to **Completed**.

**Where to go for help**

Contact the Payments Team in Finance on 020 7380 3140 or email payments@bbk.ac.uk.