Introduction
This guide explains how Expense Approvers approve or reject expense claims.

If an expense claim needs correcting the Expense Approver can either make the amendment themselves, or they can reject it back to the Initiator for them to correct and re-submit.

The role of the Expense Approver is to check:

- Is the expense appropriate as per the Expenses Policy?
- Is the coding correct (category, subproject)
- Does the description make sense?
- Is the receipt attached?

Audience
Nominated staff who have been assigned the “Expense Approver” role.

Process
This diagram shows the workflow for a standard expense claim:

A. Steps to approve an expense claim

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Tasks icon in the application toolbar.</td>
</tr>
</tbody>
</table>

2. Click the task to open it. The Travel expenses approval screen opens.

3. Each line in the Expenses section needs to be approved or rejected.

   a. Click line one to select it.
   b. Check the expense is appropriate as per the Expenses Policy
   c. Review the Expense details section below.
      a) Are the details correct, particularly the coding (Expense type, subproject).
      b) Does the description make sense?
d. Click the Document archive icon to view the receipt for this expense.

4. If no amendments are required, approve the line:
   a. Check the box on the left
   b. Click Approve. “Approve” is displayed in the Action column (c).

5. If amendments are required, you can either correct the errors yourself (go to Section B) then approve the line, or reject the line back to the initiator for them to amend and re-submit (go to Section C).

6. Now click line two and repeat the process, from step 3.

7. When you have approved or rejected all lines click Save at the bottom.
**B. Steps to correct an expense claim yourself**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Depending on what the error is, you can:  
|      |   o Add/Delete lines in the **Expenses** section  
|      |   ![Expense screenshot](image)  
|      |   o Edit fields in the **Expense details** section (e.g. change Expense type or Subproject). Note:  
|      |   Any field in this section NOT greyed out can be edited.  
|      |   o Upload the correct receipt to the **Document archive**.  
| 2.   | Enter a comment in the **Comment box** (e.g. to record your amendments)  
|      | ![Comment screenshot](image)  
| 3.   | Approve the line as in step 4 in the previous section.  
| 4.   | When you have corrected and approved all lines click **Save** (see step 7 in the previous section)  

**C. Steps to reject an expense claim back to the initiator**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | To reject the line  
|      |   a. Check the box on the left  
|      |   b. Click **Reject** “Reject” is displayed in the **Action** column (c).  
|      | ![Reject screenshot](image)  
| 2.   | Enter a comment in the comment box to explain why you are rejecting the expense:  
|      | ![Comment screenshot](image)  
| 3.   | Click **Save** at the bottom.  
| 4.   | When you have approved or rejected all lines click **Save** at the bottom.  

**What happens next?**
- When all lines are approved, the expense claim is moved on to the Payments Team for final approval and payment processing. Payment will be made within 7 days, at which point the claim status changes to **Completed**.
- If **any** of the lines have been rejected and sent back to the Initiator for amendment, the expense claim remains In **Progress**.

**Where to go for help**
Contact the Payments Team on 020 7380 3140 or email payments@bbk.ac.uk.