Withdraw an expense claim

Introduction
This guide explains how to withdraw an entire expense claim.

A. Withdraw an expense claim BEFORE it has been submitted for approval (status is Draft)
B. Withdraw an expense claim AFTER it has been submitted for approval and all lines have been rejected by the Expense Approver (status is In Progress)

Once an expense claim has been created it cannot be deleted from the system by end users (you will see the button to delete the entire claim is disabled). Hence we talk about withdrawing a 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. **Withdraw an expense claim BEFORE it has been submitted for approval**
If your claim has not yet been submitted (i.e. the status is ‘Draft’) you can either:

- Leave it in Draft and re-use it for your next expense claim
- Submit an ASK query to Business World Support and request it be deleted by the system administrator.

B. **Withdraw an expense claim AFTER it has been submitted and all lines have been rejected by the Expense Approver**
If your claim has been submitted (i.e. the status is In Progress), and all lines have been rejected by the Expense Approver, it can be withdrawn by setting the amount to £0.00.

**Step Action**
1. Click the **Task** icon in the toolbar and select the relevant task (Claimant to review and correct expense claim TransNo: 30000XXX). The **Travel expenses approval** window opens.
2. Review the Approver’s comment in the Workflow log.

3. Check the box(es) to the left of each line then click **Delete**. The lines disappear.

4. Click **Save**. A success message is displayed.

5. Click **OK**.

**What happens next?**
When you delete all lines in a rejected expense claim, the claim is posted immediately for payment as a £0.00 amount. No further action is required by the Expense Approver.

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.