Rejected Expense Claims

What to do if you have a claim rejected
If your approver rejects an expense line or the whole claim you will receive an email notification that your expense claim (or line) has been rejected. The rejected transaction will appear under Your Tasks, as below:

Click on the transaction number in the task list and the transaction will open, as below:

What to do if you have a claim rejected
To maximise the screen, click on the chevrons on the Your Tasks toolbar, as follows:

To re-open the Your tasks section of the screen click on the chevrons in the top left hand on the screen, as below:

How do I know why my claim was rejected?

To see the reason that your approver has rejected your expense claim (or line), there is a section of the screen that is called the Workflow Log, see below:
The box is quite small so to see the rest of the comments/actions you will need to use the down arrow on the left hand side to scroll down the comments until the last one is displayed which will be the one from the person who has rejected it. See below:

The action you take will be dependent on the comment that your approver has made.

**How to Amend your claim**

You will need to access the expense lines to make any changes so click on the Expenses tab, see below:

The following screen will appear:
If the expense claim has been rejected in total then the word “Rejected” will appear against every line; if only one line has been rejected that the word “Rejected” will only appear against that one line in the Workflow State Column.

If there is only one line rejected the screen will default to that line.

Depending upon the comment that the approver gave, you will now be able to amend the amount, change the sub-project, attach further receipts, etc. However, if the line is no longer required for whatever reason you need to make the amount zero and save the expense claim. This has the effect of “killing” the expense line. Please see below:
Enter zero in field and this will change the line in the summary to zero as well. The total has also been adjusted.

Click on the button on the toolbar on the top of the screen.

The following message will appear:

Successfully saved. The item is now sent for approval. Transaction number: 50000307.

The other lines that had been approved will now go forward for payment.

What to Do if your claim was rejected in total and you want to terminate it
If the claim had been rejected in total and you cannot or don’t want to re-submit it, then you need to set each line to zero as shown above until the total for the claim was zero.

Then save and the claim will terminate.