

Approve a Claim

Last Modified on 19/10/2023 3:53 pm BST

Permissions

You will require an Access Role with the following permissions:

- Check & Pay

After a claimant has submitted their claim, their approver will receive an email informing that they need to review the claim and then either approve or reject the claim.

1. Navigate from the **Home** page to **Check & Pay Expenses**. The number in brackets shows how many outstanding claims require your attention. If you do not have the Check & Pay Expenses option on your Home screen, but are an approver, contact the administrator at your organisation.
2. Click **Check Expenses** next to the claim which you will review.

Current Claims																		
	Approve Claim	Claim Number	Stage	Employee	Claim Name	Date Submitted	Status	Items with Receipts Submitted	Items with Receipts Attached	Number of Flagged Items	Total Claim Amount	Cash Claimed	Credit Card Claimed	Purchase Card Claimed	Amount To Pay	Split Approval Stage	Number Items	Approved Items
Check Expenses		1	2 of 4	Syke3, Mr Claimant	CSykes1	05/11/2020	Sent to next stage, awaiting action	1	1	0	£10.00	£10.00	£0.00	£0.00	£0.00	<input type="checkbox"/>	2	0

- Claims which appear in the **Un-allocated Claims** section are not allocated to a specific approver, but a group of approvers, who can then assign it to themselves for approval. This may be apparent in a scenario where you are part of a team, and that team has been set as an approval stage within a claimant's Signoff Group. To assign an un-allocated claim to yourself, select the check box adjacent to the claim and then click **Allocate To Me**. This will move the claim into your Current Claims section.

Un-allocated Claims													
Allocate To Me													
<input type="checkbox"/>	Claim Number	Stage	Employee	Claim Name	Date Submitted	Status	Items with Receipts Submitted	Items with Receipts Attached	Number of Flagged Items	Total Claim Amount	Cash Claimed	Credit Card Claimed	Purchase Card Claimed
There are currently no claims to display.													

3. The Expense Claim Details page displays a high level overview of the claim. As an approver, it is your responsibility to check each expense thoroughly before deciding to approve or reject each individual item or the full claim. The grid will display concise information about each expense and by using the icons, you can further investigate.

Claim: CSykes1
Expense Claim Details

Previous Claims:

General Information

Claim Name	CSykes1	Date Submitted	05 November 2020
Claim Amount	£10.00	Current Stage	2 of 4
Claimant	Syke3, Mr Claimant		

Claim History

1 2 3 4 5 6 7 8 9 10 filter

Date Stamp	Entered By	Comment	Stage	Reference Number
14/10/2019 17:03	Mr Claimant Syke3	Claim submitted.	0	
14/10/2019 17:03	System	Claim No 1 submitted. The claim has been sent to the next stage and is awaiting approval by Mr Kieron Sykes	1	

Items Waiting Approval

	Number of Miles	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	Amount Payable
<input type="checkbox"/>		14/10/2019	Course Fees (External Training)			£4.17	£0.83	£5.00	£5.00
<input type="checkbox"/>		04/11/2020	Internet Access			£5.00	£0.00	£5.00	£5.00
	0					£9.17	£0.83	£10.00	£10.00

Returned Items

	Returned	Corrected	Number of Miles	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	Amount Payable
No items have been returned for amendment on this claim.											
			0					£0.00	£0.00	£0.00	£0.00

Approved Items

	Number of Miles	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	Amount Payable
No items have been approved on this claim.									
	0					£0.00	£0.00	£0.00	£0.00

Option	Description
	Click to open the expense for further information not currently displayed on screen. You can also amend any details you think are incorrect.
	Click to remove the expense from the claim. This will send an email to the claimant explaining that the expense has been deleted.
 	Click to reveal a detailed explanation of why the expense has been flagged. This information will help you identify whether or not to approve the expense.
	Indicates that an expense has been split. This might be a Lunch expense where a portion will be charged to subsistence, and a portion will be charged to entertainment.
	Attach a scanned receipt.
	View a scanned copy of an attached receipt.
	Show all of the journey steps for the mileage being claimed.

Note: Assure Expenses Expedite Validation licenced customers will see . For more information, view [Validation Results - Approvers](#).

4. Once you have reviewed the claim, you need to **approve** or **reject** it.

- **Approving a claim or Expense Items:** If you are satisfied that the entire claim is correct

you can select all of Expense Items by clicking the check box in the column header. If you only want to approve individual Expense Items, select the check box next to those items you wish to approve. You can then click Allow Selected from the Page Options menu. These Expense Items will then appear in the Approved Items section.

Items Waiting Approval														
Select all expense items	<input type="checkbox"/>					Number of Miles	Date of Expense	Expense Item	Reason	Other Details	NET	VAT	Total	Amount Payable
Select single expense item	<input type="checkbox"/>						14/10/2019	Course Fees (External Training)			£4.17	£0.83	£5.00	£5.00
	<input type="checkbox"/>						04/11/2020	Internet Access			£5.00	£0.00	£5.00	£5.00
						0					£9.17	£0.83	£10.00	£10.00

Note: For more information on how to return a claim, view [Return an incorrect Claim or Expense Item](#).

- Once all of the expenses have been allowed, a notification will display which asks if you would like to approve the claim.

Approve Claim
✕

You have allowed all of the expense items, would you like to approve the claim now?

approve claim
cancel

Once you approve the claim, you may be required to accept the **declaration** which appears. This action will send an email to the next approver in the Signoff Group and the claim will disappear from your list of claims to approve.

- If you are the last stage in the Signoff Group and have One Step Authorisation enabled, clicking **Approve Claim** will approve the claim and allocated the claim for payment. No further action will need to be taken.
- If you are the last stage in the Signoff Group and do not have **One Step Authorisation** enabled, you will have one more step to complete before the claim is marked for payment. After you have clicked **Approve Claim**, you will be returned to the Check & Pay Expense page. You will then need to submit the claim for payment by clicking **Allocate For Payment**.

Current Claims

Approve Claim	Claim Number	Stage	Employee	Claim Name	Date Submitted	Status	Items with Receipts Submitted	Items with Receipts Attached	Number of Flagged Items	Total Claim Amount	Cash Claimed	Credit Card Claimed	Purchase Card Claimed	Amount To Pay	Split Approval Stage	Number Items	Approved Items
Allocate For Payment	260	1 of 1	Thomson, Mr Luke	boo	22/03/2021	Claim has been approved, awaiting payment	0	0	0	£23.27	£23.27	£0.00	£0.00	£23.27	<input type="checkbox"/>	1	1