Submit a Claim

Last Modified on 25/01/2023 1:45 pm GMT

Submit a Claim Select an Approver Split a Claim Odometer Readings

Permissions

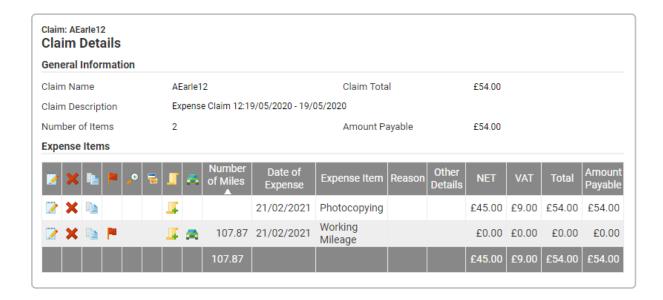
You will require the following permissions:

• You must have a Signoff Group assigned to you in order to submit your claim

Before submitting your claim, if you have additional expenses you need to add, viewAdd an Expense. If you require more information on how to add a receipt, viewAdd a Receipt.

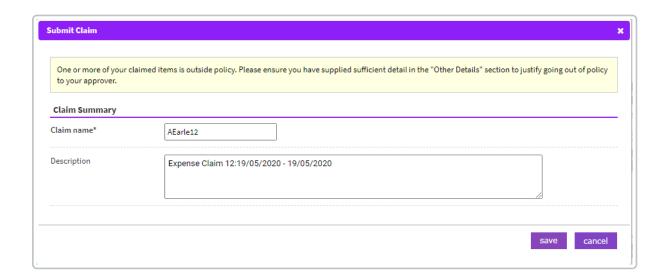
When are ready to submit your claim, follow the steps below:

- 1. Navigate from the **Home** page to **My Claims** | **Current Claims** to display a list of your existing claims.
- 2. From the Current Claims page, locate the claim that you want to submit and then click on the **Claim Name**. This will direct you to the Claim Details page.



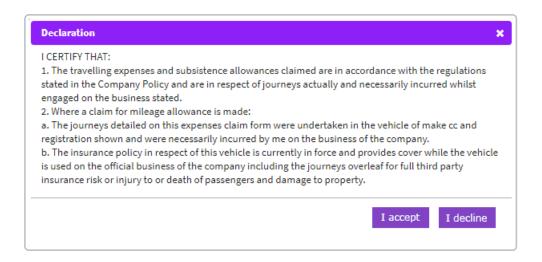
3. Click **Submit Claim** from the Page Options menu. This will display the Submit Claim window which allows you to make amendments to the Claim Name or Description before the claim is submitted into the approval process.

Note: If your organisation is licenced for Expedite services, you will first be presented with a window to confirm if you want to send receipts to RLDatix or not. For more information, view Expedite - Scan.



Note: If any of your Expense Items have been breached your organisation's expenses policy you will be presented with a window to warn you that flags have been set on certain Expense Items. Click the Cancel button to return to your claim to make any necessary amendments. You may also be permitted to enter a justification for the breach of policy. For more information on flags, view View Flag Information.

- 4. Depending on your organisation's system options, you may be required to complete additional fields which will appear within the Submit Claim window. Further information on these options are available in the tabs at the top of this article:
 - Submit a Claim Select an Approver
 - o Submit a Claim Split a Claim
 - o Submit a Claim Odometer Readings
- 5. Once all required information has been completed, click **Save**.
 - (Optional) You may be required to agree to a declaration in order to submit the claim. If a declaration appears:
 - o Click I Agree to submit the claim.
 - o Click I Disagree to return to the Claim Summary page.



6. This claim will now be available to view at the following location: My Claims | Submitted Claims.