Create a Claim

Last Modified on 06/10/2023 1:41 pm BST

- 1. From the Homepage, click My Claims.
- 2. Click the **Current Claims** option. The number of current claims you have is displayed in brackets. If you do not have any current claims **(0)**, you can skip to **step 4** of this guide.

Current Claims						
7	×	Claim Number 🔺	Claim Name	Claim Description	Number of Items	Claim Total
2	×	3	<u>Claim1</u>		2	£85.03
2	×	5	Claim3		1	£150.00

3. Click **New Claim** from the Page Options menu. This page also displays a list of your current claims which you can View, Edit or Delete.

Page Options	
New Claim	

Note: Depending upon your system configuration you may only be able to have one current claim at a time. If this is the case, the New Claim option will not be displayed within the Page Options menu. This is controlled by your system administrator.

- 4. This will direct you to the Add/Edit Claim page where you can specify:
 - The Claim Name (a default is provided).
 - The **Description**.

Add / Edit Claim							
General Details							
Claim Name: Description:	Claim4						
save cancel							

Note: You will be re-presented with this screen prior to submission of your claim, where you can enter additional information, if required at that time.

- 5. Click **Save** and your claim will be created; you will then be directed back to the Current Claims screen. This will provide a list of all of your current claims.
 - For information on how to start claiming expenses, viewAdd an Expense.
 - For information on how to submit a claim, viewSubmit a Claim.