Return an Expense

Last Modified on 20/10/2023 10:47 am BST

Permissions

You will require an Access Role with the following permissions:

- Check & Pay

As an approver, you may feel it is necessary to query or return an expense to the claimant. You have the option to return individual expenses or un-submit the whole claim.

1. Navigate from the **Home** page to **Check & Pay Expenses**.

2. Click **Check Expenses** next to the relevant claim.

3. The **Expense Claim Details** page lists each expense which has been added to the claim. You can then do the following:

   - Return an Expense - Select the check box next to to each item that you want to return to the claimant.

   - Unsubmit Claim - Click the **Unsubmit Claim** button within the Page Options menu. You will then need to enter a reason for unsubmitting the claim.

4. Click **Return Selected** from the Page Options menu.
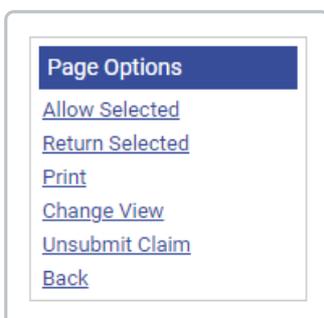
5. Enter the reason for returning the expense(s). It is useful to provide the claimant with the information that they need to amend their expense before it can be approved.

Return Expense(s)

Reason for returning*

[   ]

OK   cancel

6. Click **OK**. This will move the expense from the **Items Waiting Approval** section into the **Returned Items** section.

> **Note:** The claim cannot be progressed to the approver until each expense has been allowed or incorrect expenses have been deleted.