

Redirect Claims - Feature Overview

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Overview

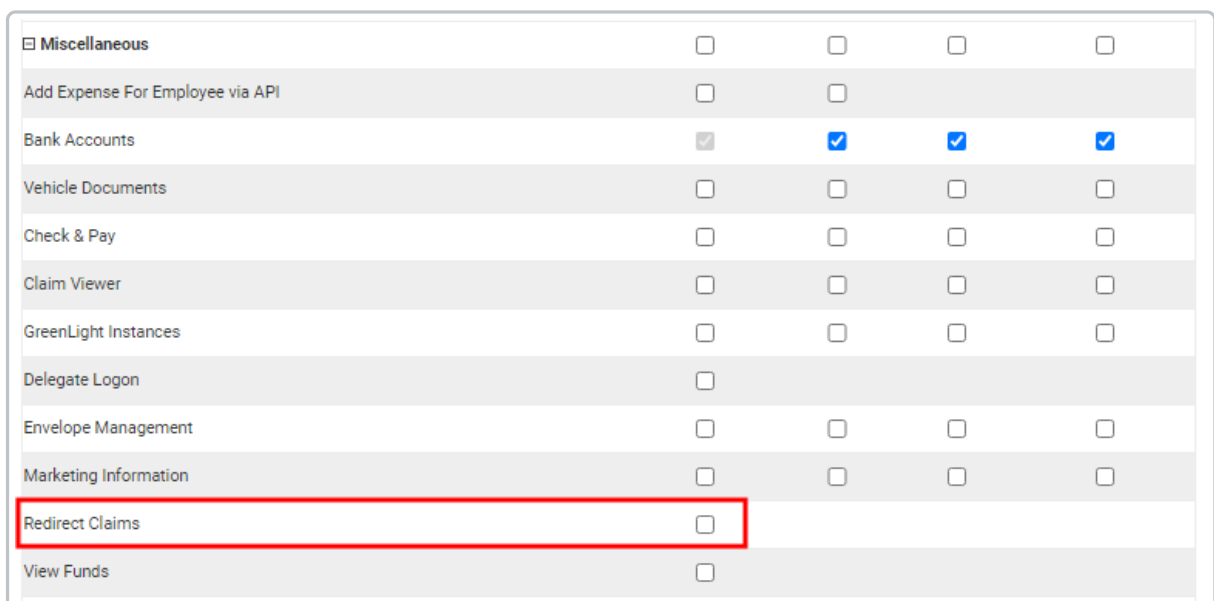
Redirect Claims is a powerful feature that allows you to browse claims by approver and then redirect those claims to a new approver. This was primarily designed for situations where an approver is not available in the short term such as sickness or holidays, where a delegate has not been set. A user with the correct permissions is able to search for the approver and then move their claims onto other available approvers so that the claim can be processed as fast as possible.

Features & Benefits

Feature/Benefit	Description
Remove bottlenecks	Remove bottlenecks by redirecting claims to available approvers so that your claimants are reimbursed on time
Flexibility	Select one or multiple claims to move to a new approver
No impact on Signoff Group	Redirecting claims between approvers using this feature does not affect the Signoff Group which has been defined
Email Notifications	Email notifications will be sent to the old approver, new approver and claimant detailing the changes which have been made, including the justification.
Detailed Auditing	Entries will be made into the Claim History and Audit Log when this feature is used to redirect claims

Implementation/Best Practice

1. Configure the appropriate Access Roles to include the **Redirect Claims** permission, located under the **Miscellaneous** heading. Every user with this Access Role will be able to access the menu, so be careful to only add the permission to the correct roles.



<input type="checkbox"/> Miscellaneous	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Expense For Employee via API	<input type="checkbox"/>	<input type="checkbox"/>		
Bank Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vehicle Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check & Pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Claim Viewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GreenLight Instances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delegate Logon	<input type="checkbox"/>			
Envelope Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Redirect Claims	<input type="checkbox"/>			
View Funds	<input type="checkbox"/>			

2. Users with this permission can then access the **Redirect Claims** menu from the homepage. For information on how to redirect claims, view [Redirect Claims to a New Approver](#)
