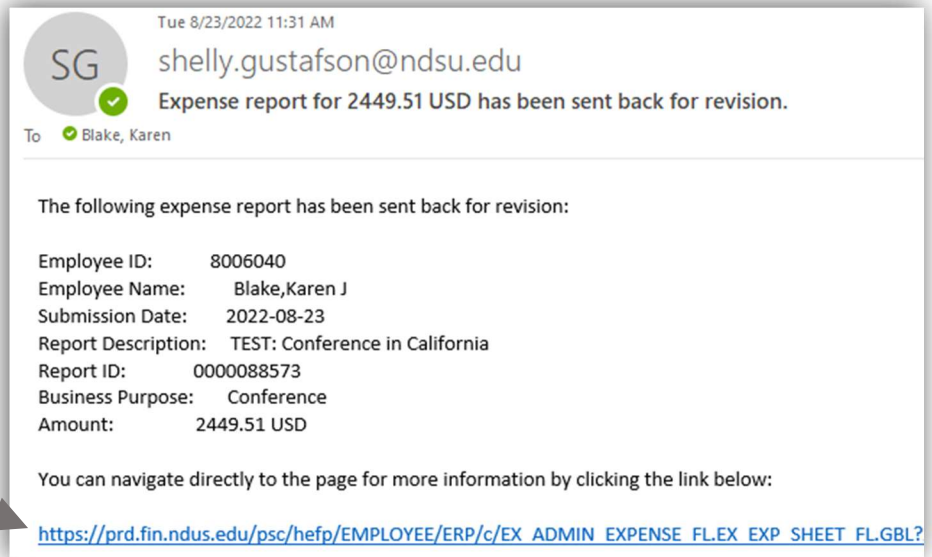


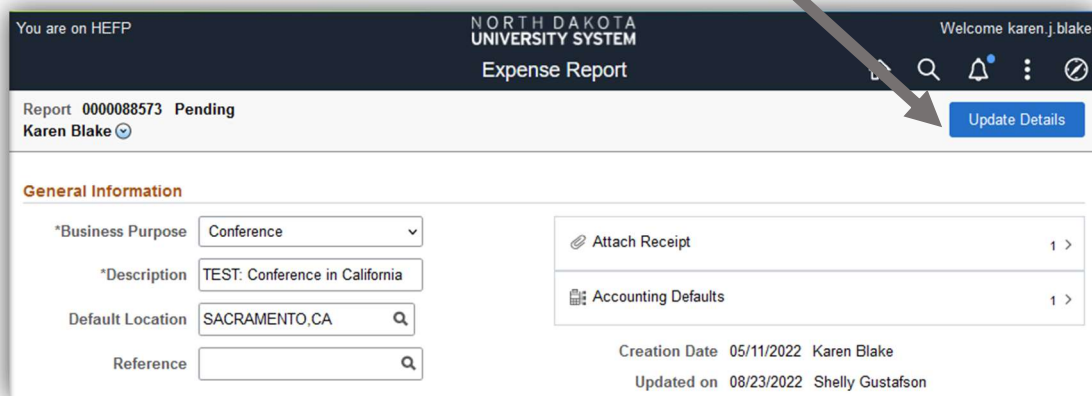
What to Do When Your Expense Report is Returned

Expense reports go through several layers of approval. At each level, the report will either be approved or sent back for revision. If a revision is needed, you will receive an email alerting you that your expense report has been sent back. The email gives the report number, date, amount and description, as shown here, along with a clickable link to take you directly to your report:



To review the errors, click the email link. You will go directly to the General Information section of the report, also known as the report header, but in order to see the reason for the return, you will need to dig a bit deeper.

First, click the "Update Details" link on the top right corner of your screen:



Once you are in the expense report, you'll see a list of the individual components of the report, *but you will still not see the approver's comments on this screen*. In order to see the corrections that are necessary, you will need to proceed to the Expense Report Summary screen, where you can review the report. Click the "Review and Submit" link, as shown:



Once you are on the Expense Report Summary, you will be able to see the full approval history of the report, including red text – this is the most recent and the reason for the return of the report.

Expense Report Summary

Total (9 Items)	2,449.51 USD
Due to Employee	2,449.51 USD

Additional Information

- View Analytics
- Notes** 2 >
- View Printable Report

Approval Status

Report ID 0000088573 Pending

- Submitted
Karen Blake
Employee
08/23/2022 9:42:02AM
- Sent Back For Revision
Shelly Gustafson
HR Supervisor
08/23/2022 9:51:16AM
- Resubmitted
Karen Blake
Employee
08/23/2022 10:02:31AM
- Sent Back For Revision**
Shelly Gustafson
HR Supervisor
08/23/2022 10:29:32AM
Need additional documentation for purpose of travel to include the purpose, destination and dates of the event.

You may not see full text of the note. **Always click the "Notes" section**, found under "Additional Information" as shown above. You will see a pop-up window with ALL notes added to the expense report, not just the most current notes.

Notes

2 rows

Add Notes Edit

Date/Time	Name	Role	Notes
08/23/2022 10:29 AM	Shelly Gustafson	HR Supervisor	Sent Back For Revision - Need additional documentation for purpose of travel to include the purpose, destination and dates of the event.
08/23/2022 9:51 AM	Shelly Gustafson	HR Supervisor	Sent Back For Revision - Returning

Notes

Once you have established the needed corrections or clarifications, you can make needed changes. Notes can be added at the top of the pop-up window, if needed. Close the window and use the "Update Details" and "Submit" buttons to navigate back and forth in the report. General attachments can also be added on the left side of the Summary.

Expense Report Summary

Total (9 Items)	2,449.51 USD
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Approval Status

Report ID 0000088573 Pending