What is the Overall Process for Approving Expenses?

Employees create and submit expenses online. There is an option to attach any receipts to the request for management review. The request will automatically go to their expense manager upon submission. The expense manager reviews and approves the request online. Once approved, the request is automatically sent to the expense administrator. The expense administrator reviews the approved request and processes the expenses to be paid on an upcoming scheduled paycheck or via an off cycle.
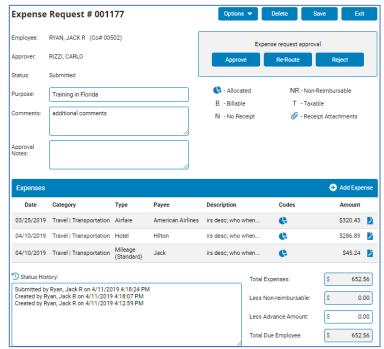
How Do I Know there is an Expense Request to Approve?

You will receive an e-mail notification that an employee has submitted an expense request. You can open it to see the type, dates, purpose, and total amount of the expenses.

How do I Open the Employee's Request?

Wage & Tax > Expense Approval

- Click the Edit Icon on the Expense Line you are reviewing.

Expense Request # 001177

| | Options ▼ | Delete | Save | Exit |

Employee: RYAN, JACK R (Co# 00502)

Approver: RIZZI, CARLO

Status: Submitted

Expense request approval

| Approve | Re-Route | Reject |

Purpose: Training in Florida

Comments: additional comments

- Allocated   NR - Non-Reimbursable
B - Billable   T - Taxable
N - No Receipt   - Receipt Attachments

Approval Notes:

Expenses   ⊕ Add Expense

Date	Category	Type	Payee	Description	Codes	Amount
03/25/2019	Travel | Transportation	Airfare	American Airlines	irs desc; who when…		$320.43
04/10/2019	Travel | Transportation	Hotel	Hilton	irs desc; who when…		$286.89
04/10/2019	Travel | Transportation	Mileage (Standard)	Jack	irs desc; who when…		$45.24

⟳ Status History:

Submitted by Ryan, Jack R on 4/11/2019 4:18:24 PM
Created by Ryan, Jack R on 4/11/2019 4:18:07 PM
Created by Ryan, Jack R on 4/11/2019 4:12:59 PM

Total Expenses:	$	652.56
Less Non-reimbursable:	$	0.00
Less Advance Amount:	$	0.00
Total Due Employee:	$	652.56

How Do I Approve or Reject a Reimbursement Request?

Wage & Tax > Expense Approval

- Click **Edit** Icon on the line of the request you want to open.
- To view an individual expense, click **Edit** Icon on the line of the expense. Then review the expense details and click **Cancel**.
- Type any comments in the Approval Notes text box.
- To approve the request, click **Approve** then click **OK** in the pop-up box.
- **Result:** The approved Expense Request is submitted for final review and processing. When the request is processed by the expense administrator, the status will change to Posted. The employee will be reimbursed on his/her next scheduled paycheck, or via off cycle at which time the status will change to Paid.
- If your company requires a Re-Route, Click the Re-Route Button for additional approval.
- To reject the request, click **Reject** then click **OK** in the pop-up box.

How Can I Update the Expense Prior to Approval?

Wage & Tax > Expense Approval

- On the Expense Reimbursements page, find the expense request you wish you update.
- Click **Edit** on the line of the request you want to edit and make any necessary changes. Then click **Save**.
- To edit an individual expense, click **Edit** on the line of the expense and make any necessary changes. Then click **Save.**

Expense Administrator: How to Pay Out an Expense Request?

Wage & Tax > Expense Approval

- On the Expense Reimbursements page, select the employee who submitted the expense request.
- Click the **Post** Icon on the line of the request you want to have paid
  Result: The expense is posted and ready to be paid through an Off-Cycle or the next scheduled payroll.

How do I ask for Additional Information

If you need further assistance with any part of ExponentHR, contact the ExponentHR Customer Support desk at: (866) 612-3200 or support@exponenthr.com.