What to do if your approver is incorrect/null

This guide is for use by medical officers who have identified that their direct line manager (DLM) is not appearing as their 'Approver' in Oracle iExpense.

Contents

Who is your 'Approver'?

As a medical officer (MO) logging into Oracle on a computer (as opposed to a mobile device), clicking *Internet Expenses* and selecting *Create Expense Report* takes you to 'Step 1' of creating a PDR claim.

On this page, you should see the word '**Approver**' and to the immediate right of this word (at the location of the pink rectangle in the picture below) should be the name of your **direct line manager** (or 'DLM', for short; this is the person who will be reviewing your PDR claims for approval). The data to inform this 'Approver' field is drawn from your position's 'Reports To' (REL01) field in the HR database '**CHRIS21**' every Sunday morning.

If you have multiple MO contracts/employee numbers with SA Health, click here for an explanation on how your Approver is determined.

If your DLM is due to take leave, it is expected they set vacation rules (following these steps) prior to going on leave so any claims you submit to them are automatically diverted to the person acting in their position.

If your Approver is incorrect or there is no name to the right of 'Approver', see How to change your Approver.

If you do not know who your DLM should be, [lookup your DLM according to CHRIS21](#), or contact your local admin, HR or business unit for advice.

How to correct your Approver

If you know who your direct line manager (DLM) should be, and this name does not appear to the right of the 'Approver' field at Step 1 of 4 in Oracle iExpense, follow these steps (for governance reasons, you are unable to select your own Approver):

1. [Create a new expense report](#)
2. [Check your DLM according to CHRIS21](#)
3. [Check your Oracle Expense Report Preferences](#)

Create a new expense report

A common reason for an expense report showing an incorrect or former DLM as your Approver is *referring to an expense report that was drafted prior to your DLM being updated in CHRIS21*. This is because when you create an expense report, it takes a snapshot of your Approver at that time and this value remains static.

Go to Oracle (https://erp.had.sa.gov.au) > Internet Expenses > Create Expense Report.

If creating a new expense report does not change your Approver, [check your DLM according to CHRIS21](#).

If your Approver is now correct, consider using this new expense report to draft and progress your claim – this will likely be the quickest way to progress your claim. If you do not wish to create a new expense report, perhaps because you have a pending expense report with many items that quotes an incorrect Approver, contact Health.PDReimbursement@sa.gov.au for assistance.

Check your DLM according to HR/CHRIS21

To ensure your direct line manager (DLM) is correct in CHRIS21, log in with your CHRIS Employee Number at https://selfservice.hrms.sa.gov.au/PROD2/, click the head/shoulders icon (as pictured in the pink circle below) to the right of your name/title/email and refer to the 'Reports To:' value.

If the 'Reports To:' value in HR21 matches the name of your DLM, while in Oracle your Approver is incorrect despite creating a new expense report, please check your Oracle Expense Report Preferences before escalating the matter further.

If the 'Reports To:' value does not match the name of your DLM (but does match the name of your Approver in Oracle), or is blank, we recommend waiting until the following Monday and if your Approver is still incorrect after creating a new expense report, contact your manager or local admin/HR/business support to correct your CHRIS21 record to reflect your reporting relationship to your DLM.

Check your Oracle Expense Report Preferences

1. Log in to Oracle
2. Go to 'Preferences' (in the top right corner of the screen)
3. Select 'General' under 'Expense Preferences' in the left menu
4. Select 'Expenses Preferences'
5. Click either the 'Save' or 'Apply' buttons
6. Go to Home > Internet Expenses > Create Expense Report

If your Approver is still incorrect when creating a new expense report despite your DLM being correct in HR21, and your Oracle Expense Report Preferences Defaults Source being set to 'Expenses Preferences', then please contact Health.PDReimbursement@sa.gov.au for support stating the name of your correct DLM and that you have performed the troubleshooting steps outlined in this document.

Common questions & error messages

Who is my Approver if I have multiple contracts?

Please note that as an MO accessing Oracle iExpense to apply for professional development reimbursement (PDR) you will have a single login (HAD ID/username) regardless of the number of contracts you have with SA Health.

Your PD balances are held with your **primary** LHN/agency, which is determined by which contract has the following attributes by comparison with the other contract/s:

1. **Greatest FTE**;

2. If FTE is equal, then the **position you have been in the longest** (not necessarily the agency/LHN you have been with the longest) is your primary;

3. If 1 & 2 are equal, it is the contract with the **lowest employee number** that is your primary.

As such, only one direct line manager (DLM) is able to approve claims on Oracle – this being the DLM at your primary LHN/agency.

By design, Oracle iExpense does not allow for approval by multiple DLMs, however MOs with multiple contracts/DLMs are to obtain approval from their non-primary DLM(s) by using the Multi contract medical professional development reimbursement form (DOCX 852KB) and attaching it to the claim to inform the primary DLM (who will review the claim for approval on Oracle).

Can I choose my Approver?

Your Approver is based on the reporting relationship reflected in CHRIS21, the exception being where your direct line manager (DLM) is on leave and Vacation Rules are set.

In alignment with the Enterprise Agreements there is no process for changing an individual's 'Approver' in Oracle iExpense based on preference.

How long will it take for my claim to be approved?

Your Approver (DLM) has 10 days to approve your expense report before it is returned to you to resubmit / follow up with your DLM.

Error Message: "Approver: The specified approver is not defined as a user of the application. Please enter another approver, or select one from the list of values."

Contact Health.PDReimbursement@sa.gov.au for assistance.

For more information

Incorrect or Null Approver.docx
Last updated 12-Sep-23

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