

Approving an Expense Report Claim Submitted by a Delegate

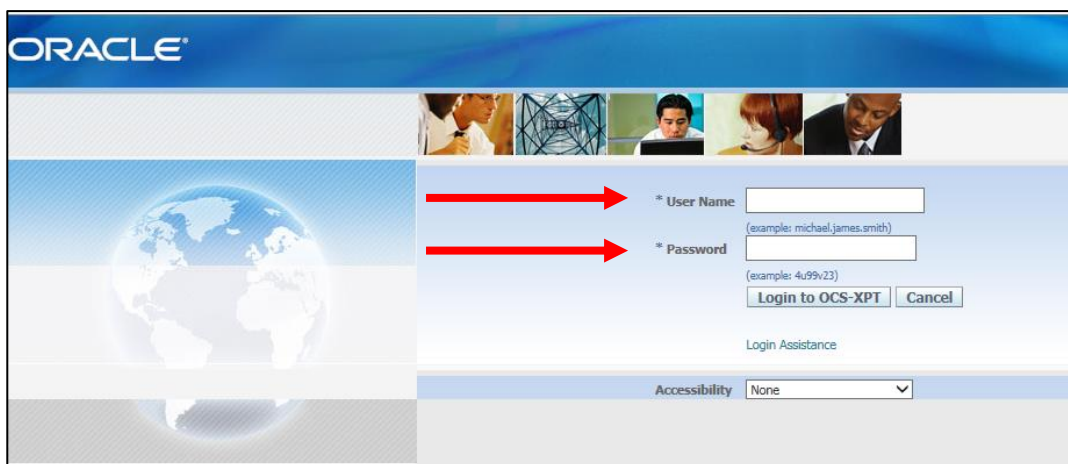
Medical Officer: To approve an expense report claim submitted by a nominated delegate via a desktop computer, please follow the steps below

Quick Check

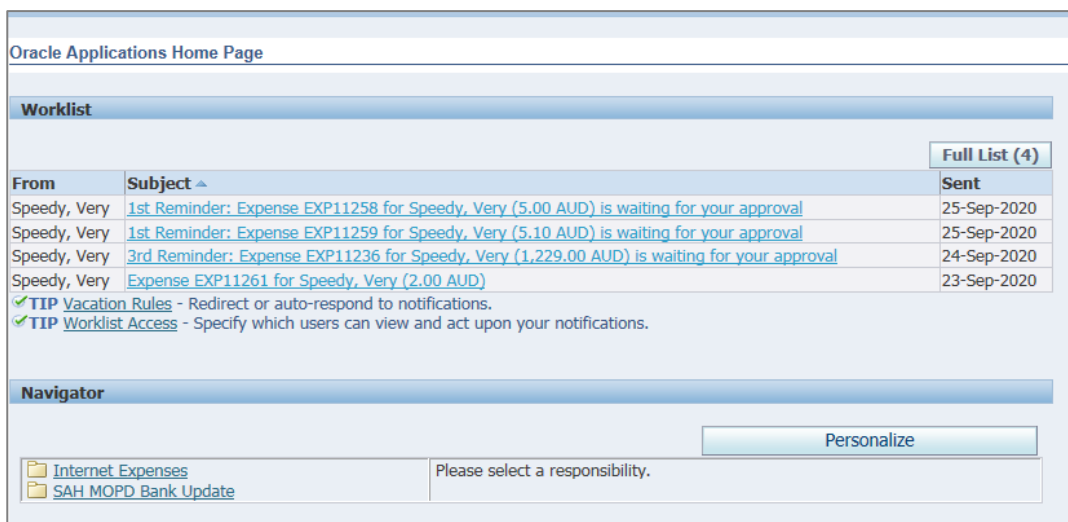
- Step 1: [Find Expense Reports submitted by a Delegate](#)
- Step 2: [Check entitlements, declarations, invoices and/or receipts](#)
- Step 3: [Approve and submit to Direct Line Manager](#)

Process

- > To log onto Oracle Corporate Systems use your HAD ID and Password



- > Once logged on, you will be taken to the *Oracle Applications Home Page* as shown below



Step 1: Find Expense Reports submitted by a Delegate

- > All expense reports submitted by your Delegate waiting for approval will appear under the *Worklist* heading
- > To view an expense report select the relevant hyperlink located under the *Subject* heading to proceed

Oracle Applications Home Page

Worklist

From	Subject	Sent
Speedy, Very	1st Reminder: Expense EXP11258 for Speedy, Very (5.00 AUD) is waiting for your approval	25-Sep-2020
Speedy, Very	1st Reminder: Expense EXP11259 for Speedy, Very (5.10 AUD) is waiting for your approval	25-Sep-2020
Speedy, Very	3rd Reminder: Expense EXP11236 for Speedy, Very (1,229.00 AUD) is waiting for your approval	24-Sep-2020
Speedy, Very	Expense EXP11261 for Speedy, Very (2.00 AUD)	23-Sep-2020

[TIP Vacation Rules](#) - Redirect or auto-respond to notifications.
[TIP Worklist Access](#) - Specify which users can view and act upon your notifications.

Navigator

[Internet Expenses](#) | Please select a responsibility. | [SAH MOPD Bank Update](#)

Personalize

Step 2: Check entitlements, declarations, invoices and/or receipts

- > Select, the *Expense Report Details* hyperlink as shown below

ORACLE E-Business Suite - XPT - Clone of Prod at: 20-feb-2020 at 07:53. Next Refresh:

Oracle Applications Home Page >

1st Reminder: Expense EXP11258 for Speedy, Very (5.00 AUD) is waiting for your approval

[Approve](#) [Reject](#) [Reassign](#) [Request Information](#)

From: Speedy, Very
 To: Approver, Ivan
 Sent: 25-Sep-2020 09:36:20
 Due: 29-Sep-2020 09:36:20
 ID: 37557716

Expense Report for Individual's Cost Center: Speedy, Very 1063
 Expense Report Total: 5.00 AUD
 Attachments: receipt

Cash and Other Expenses: Business Expenses

Line	Date	Expense Type	Reimbursable Amount (AUD)	Justification	Imaged Receipt Required	Attachments
1	01-Sep-2020	IT Accessories Ind/Set <= \$300	5.00	5.00	✓	
Total			5.00			

Action History

Num	Action Date	Action	From	To	Details
1	25-Sep-2020 09:36:20	Submit	Speedy, Very	Approver, Ivan	

Related Applications

[Expense Report Details](#)

Response

Note:

Return to Worklist

[Approve](#) [Reject](#) [Reassign](#) [Request Information](#)

- > In the *Expense Report Details* page you will be able to check details such as expense total, FBT total related to the expense report, invoice and/or receipt attachments, declarations and approval notes (refer overleaf for visual)

ORACLE E-Business Suite - XPT - Clone of Prod at: 20-feb-2020 at 07:53. Next Refresh:

Expense Report EXP11258

Amount: \$5
 FBT Amount: \$0
 Less Tax: \$0
 PD Claim Amount: \$5
 PD Leave Amount: 0
 Exam Leave Amount: 0

General Information

Name	Speedy, Doctor Very (16938)	Attachments	View
Expense Dates	01-SEP-2020 - 01-SEP-2020	PD \$ Balance	41712
Cost Center	1063	PD Leave Balance	17
Purpose		PD Exam Leave Balance	0
Approver	Approver, Doctor Ivan	FBT Declaration	Yes
Original Receipts Status	Not Required	Employee Certification	Yes
Imaged Receipts Status	Received	Report Total	5.00 AUD
Report Submit Date	22-SEP-2020	Reimbursement Amount	5.00 AUD

Expense Lines | Expense Allocations | Weekly Summary | **Approval Notes [2]**

Note	Author	Date
Provide Information now attached	Speedy, Doctor Very	23-Sep-2020 14:00:28
Request Information Please attach a clear receipt	Approver, Doctor Ivan	22-Sep-2020 11:34:35

- > There are two ways in which you can check further declarations and invoice and/or receipt attachments in the Expense Report page:
 1. Via the *Attachments* heading (to view select the *View* hyperlink)
 2. Via the *Expense Lines* tab at the bottom of the page

PD Claim Amount: \$5
 PD Leave Amount: 0
 Exam Leave Amount: 0

General Information

Name	Speedy, Doctor Very (16938)	Attachments	View
Expense Dates	01-SEP-2020 - 01-SEP-2020	PD \$ Balance	41712
Cost Center	1063	PD Leave Balance	17
Purpose		PD Exam Leave Balance	0
Approver	Approver, Doctor Ivan	FBT Declaration	Yes
Original Receipts Status	Not Required	Employee Certification	Yes
Imaged Receipts Status	Received	Report Total	5.00 AUD
Report Submit Date	22-SEP-2020	Reimbursement Amount	5.00 AUD

Expense Lines | Expense Allocations | Weekly Summary | Approval Notes [2]

Business Expenses

Cash Expenses

Date	Receipt Amount	Expense Type	Justification	Merchant Name	Original Receipt Required	Imaged Receipt Required	Reimbursable Amount (AUD)	Details	Attachments
01-Sep-2020	5.00 AUD	IT Accessories Ind/Set <= \$300				✓	5.00		
Total							5.00		

- > When you have completed the check, you can return to the main *Expense Report Details* page by selecting the *Return* button which is located at the top right hand corner of the page

Step 3: Approve and submit to Direct Line Manager

- > In the main *Expense Report* page, you will be able to either, *Approve*, *Reject* or *Request Information*. Please refer the below visual for details:

1st Reminder: Expense EXP11258 for Speedy, Very (5.00 AUD) is waiting for your approval

From **Speedy, Very** Expense Report for **Speedy, Very**
 To **Approver, Ivan** Individual's Cost Center **1063**
 Sent **25-Sep-2020 09:36:20** Expense Report Total **5.00 AUD**
 Due **29-Sep-2020 09:36:20** Attachments [receipt](#)
 ID **37557716**

Cash and Other Expenses: Business Expenses

Line	Date	Expense Type	Reimbursable Amount (AUD)	Justification	Imaged Receipt Required	Attachments
1	01-Sep-2020	IT Accessories Ind/Set <= \$300	5.00		✓	
Total			5.00			

Action History

Num	Action Date	Action	From	To	Details
1	25-Sep-2020 09:36:20	Submit	Speedy, Very	Approver, Ivan	

Related Applications

[Expense Report Details](#)

Response

Note

[Return to Worklist](#) [Approve](#) [Reject](#) [Reassign](#) [Request Information](#)

- > To reject an expense report, add a response in the free text box at the bottom of the page then select the *Reject* button
- > To request further information for an expense report select the *Request Information* button at the bottom right hand corner of page and check that the workflow participant is correct
- > Add your comment in the *Information Requested* field and click the *Submit* button in the bottom right hand corner of the screen
- > To approve an expense report select the *Approve* button at the bottom right hand corner of the page
- > When the expense report has been approved, you will be returned to your *Oracle Applications* Home Page and the expense report will have been moved from your worklist
- > Your claim has now been submitted to your Direct Line Manager for approval.

For more information

Medical Officer Professional Development
 Reimbursement System (MOPDRS)
 Clinical System Support & Improvement, SA Health
Health.PDRReimbursement@sa.gov.au
sahealth.sa.gov.au/reimburseme

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