

## **ER - Review, Submit and find the status**

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## STEP 1

### Click Review and Submit.

Once you've reviewed all expense lines for accuracy, you're ready for one last review before submitting.

Click Review and Submit.

The screenshot shows the 'Expense Entry' form. On the left, there is a list of items with a total of 82.820 USD. The items are:

- Monday, November 07, 2022
- Domestic TR-PerDiem - In State (breakfast lunch and dinner) - 26.000 USD
- Domestic TR-Mileage (trip to Patoka Lake for audit) - 56.820 USD

The main form area is for 'Domestic TR-PerDiem - In State - 11/07/2022'. It includes fields for Date (11/07/2022), Expense Type (Domestic TR-PerDiem - In St), and Description (breakfast lunch and dinner). Under 'Payment Details', the Payment is 'Employee Paid' and the Amount is 26.000 USD. Under 'Additional Information', the Billing Type is 'In State-Billable', the Originating Location is 'Indianapolis, IN', and the Expense Location is 'Birdseye, IN'. There are also sections for 'Per Diem Deductions', 'Attach Receipt' (3 items), and 'Accounting' (1 item). A 'Receipt Split' button is at the bottom.

## STEP 2

### Review the Expense Summary page.

The Expense Summary page will be displayed. The General Information (Header) can be updated by clicking the pencil icon to the right of the ER Description and the expense lines can be updated by clicking Update Details.

The screenshot shows the 'Expense Summary' page. The header includes 'Expense Entry' and 'Expense Summary'. The user is '080 Auditing in Birdseye' and 'Misti Thornton'. There is a pencil icon next to the user name and an 'Update Details' button. The 'Last Saved' time is 11/18/2022 7:18AM.

The 'Expense Report Summary' section shows:

Total (2 Items)	82.820 USD
Due to Employee	82.820 USD

The 'Approval Status' section shows:

Report ID	0000172674	Pending
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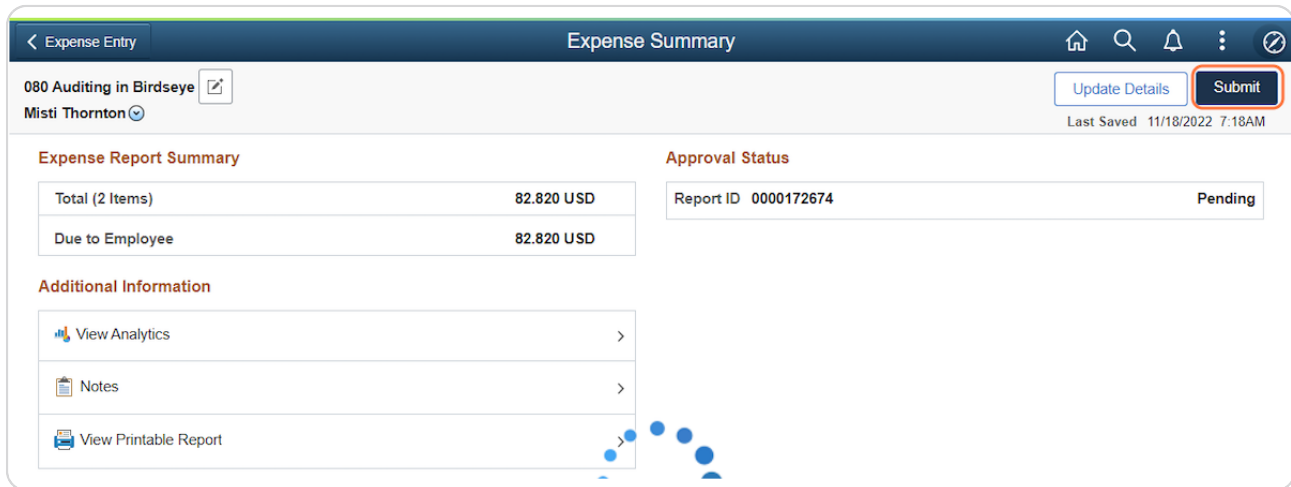
The 'Additional Information' section includes:

- View Analytics
- Notes (4)
- View Printable Report

### STEP 3

#### Click Submit.

Once you've reviewed everything and you're satisfied, you're ready to click Submit.

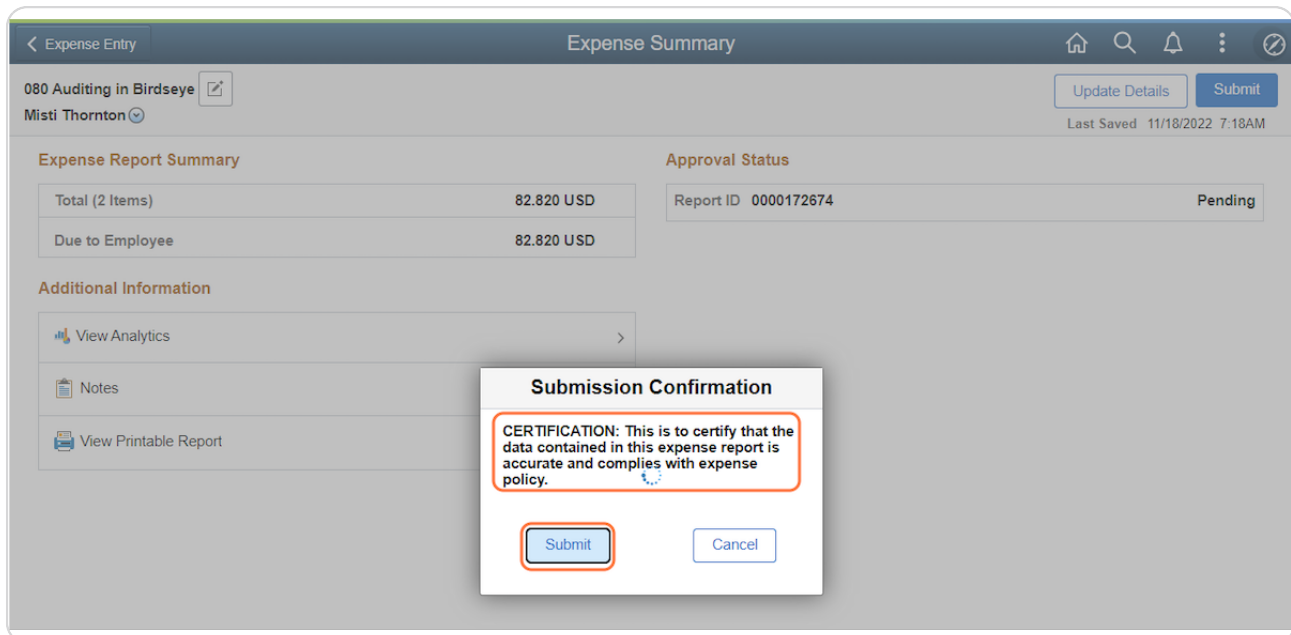


### STEP 4

#### Click Submit on the Submission Confirmation warning pop-up.

Read the Submission Confirmation warning and click Submit.

A brief confirmation message will be displayed.



## STEP 5

### Open the ER from the Awaiting Approval tab.

After the process completes, it'll take you to the Awaiting Approval tab of the My Expense Reports page. On the appropriate Report ID line, you'll see "Submission in Process" under the Status column; click anywhere on the line to open it.

**My Expense Reports**

Misti Thornton  
10000002811  
SBA - FLD DIV

Returned: 0  
Not Submitted: 0  
**Awaiting Approval: 3**  
Pending Payment: 0  
View All: 3

**Awaiting Approval** 3 rows

Create Expense Report

Actions	Description	Report ID	Status	Approver	Role	Updated Date	
	080 Auditing in Birdseye	0000172674	Submission in Process			11/18/2022	USD >
	00080 OOS ER	0000172671	Submitted for Approval	Michael Rhoads	Fiscal Approver	11/17/2022	USD >
	00080 Instate ER	0000172670	Submitted for Approval	Michael Rhoads	Fiscal Approver	11/17/2022	USD >

## STEP 6

### Review the Expense Summary page.

Review the Expense Summary page as desired.

Under Approval Status, you'll see the required approval steps and the status on each one. The icons to the left of each step will give you a quick update: a checkmark means that step is completed, an hourglass means that step is in progress, and an exclamation point means that step hasn't been started yet.

**Expense Summary**

080 Auditing in Birdseye  
Misti Thornton

View Details Withdraw  
Last Saved 11/18/2022 7:19AM

**Expense Report Summary**

Total (2 Items)	82.820 USD
Due to Employee	82.820 USD

**Additional Information**

- View Analytics >
- Notes >
- View Printable Report

**Approval Status**

Report ID 0000172674 Submitted for Approval

	<b>Submitted</b>	Misti Thornton
	Employee	11/18/2022 7:19:11AM
	<b>Pending Approval</b>	Michael Rhoads
	Fiscal Approver - Expense	
	<b>Not Routed</b>	Jeffrey Arthur
	HR Supervisor	
	<b>Not Routed</b>	(Pooled)
	Agency Travel Dept - Expense	
	<b>Not Routed</b>	(Pooled)
	AOS Expense	
	<b>Not Routed</b>	Payment