

Withdrawing Expense Reports

This guide outlines the process of withdrawing an expense report submitted in error for the purpose of making changes for resubmittal.


Additional Resources:

- ap@gmhec.org
- (802) 443-2321

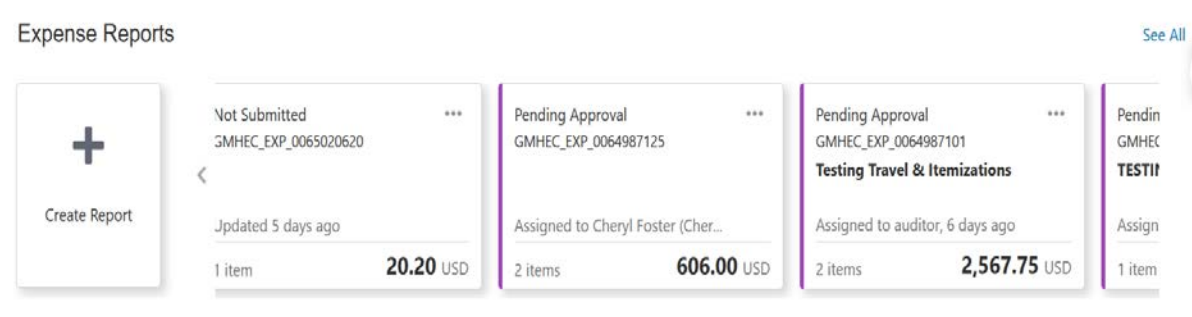
Process Step & Description	Action
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1.1
Navigate to **Expense Reports**

Navigation Path:
 ➤ Me → Expenses

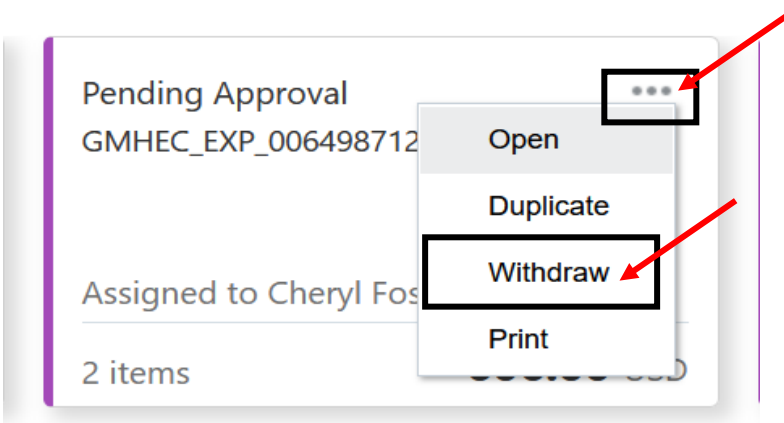


Navigate to the expense reports screen to view all expense reports. Locate the report needing to be withdrawn.

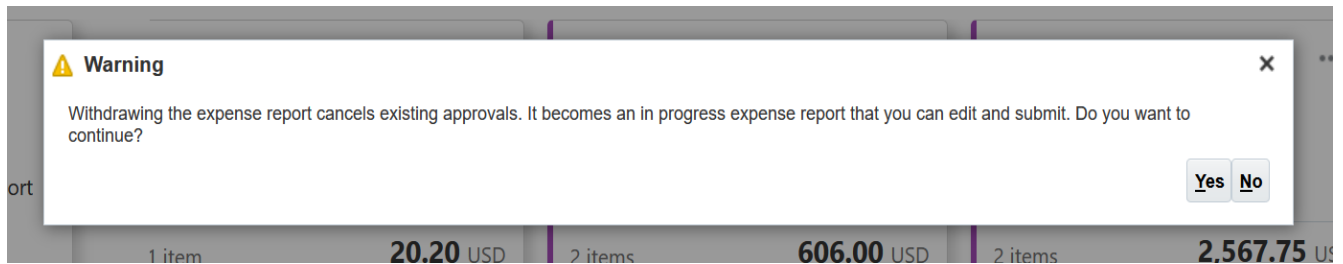


1.2
Withdraw the **Expense Report** using actionable tiles

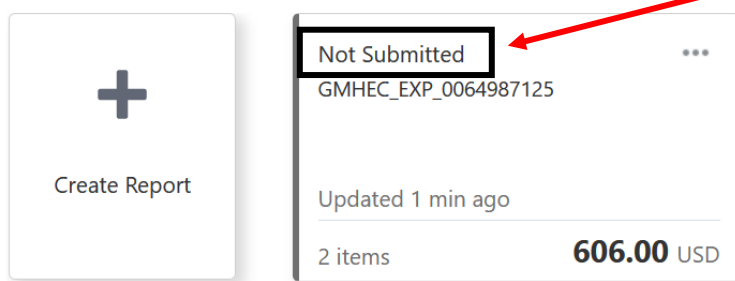
Click on the **...** icon in the tile of the report needing to be withdrawn, and select **Withdraw**



Click **Yes** on the pop-up box confirming the withdrawal of the expense report.



Expense Reports

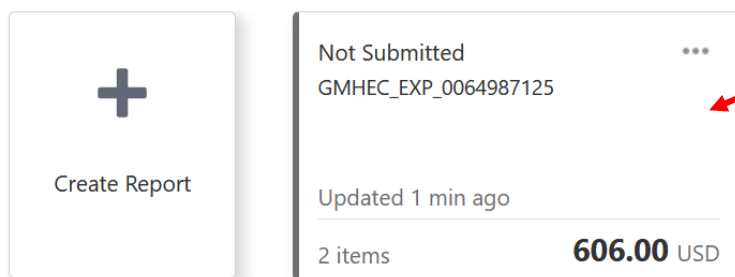


Note: The ability to withdraw is *only* available for expense reports in **Pending Manager Approval** status

After withdrawing the report, it will move back into **Not Submitted** status. This allows the ability to make changes as necessary and resubmit the report for approval; or delete the report completely.

After the expense report has been withdrawn, click on the tile to open the report to make changes as needed, then resubmit for approval.

Expense Reports



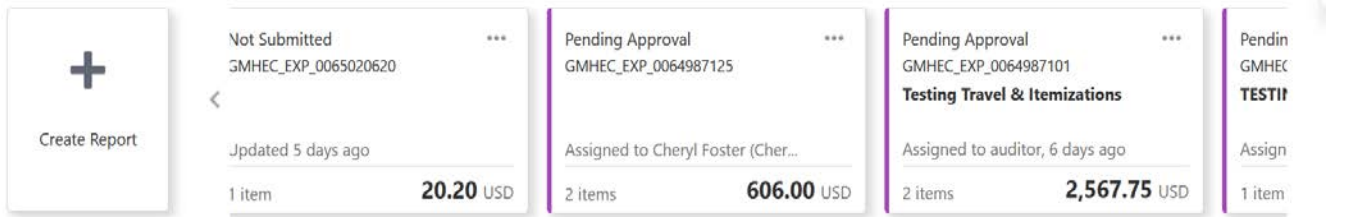
For instructions on how to make changes to items in an Expense Report see the help guides at www.GMHEC.org/Support in the Finance Knowledge Base.

1.2 (Cont.)

1.2 If making changes, edit and resubmit the **Expense Report**

Select **See All** to view all your expense reports.

Expense Reports

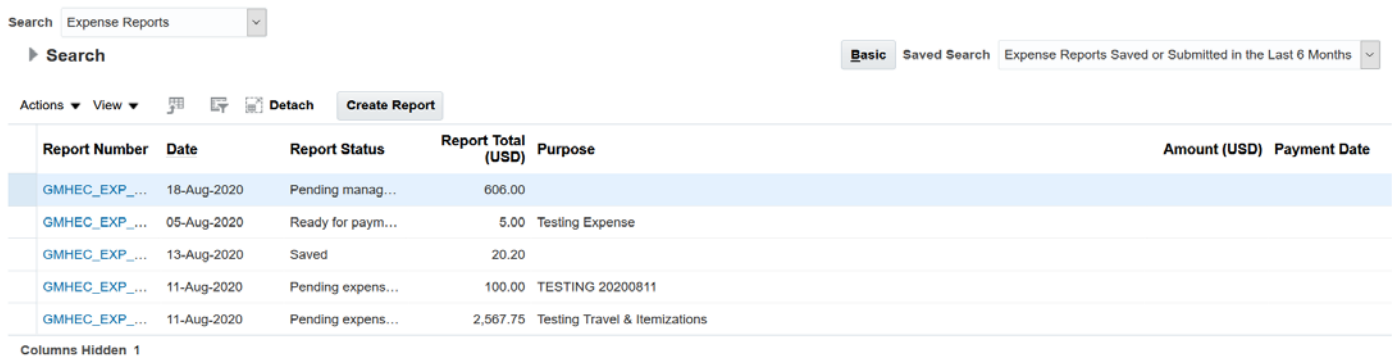


The dashboard shows a 'Create Report' button on the left and five report cards. A red arrow points to a 'See All' button in the top right corner.

Report Status	Report ID	Report Total (USD)	Items
Not Submitted	GMHEC_EXP_0065020620	20.20	1 item
Pending Approval	GMHEC_EXP_0064987125	606.00	2 items
Pending Approval	GMHEC_EXP_0064987101	2,567.75	2 items
Pending Approval	GMHEC_EXP_0064987101	2,567.75	2 items
Pending Approval	GMHEC_EXP_0064987101	2,567.75	2 items

Click **Next** to the report that needs to be withdrawn so that it highlights blue.

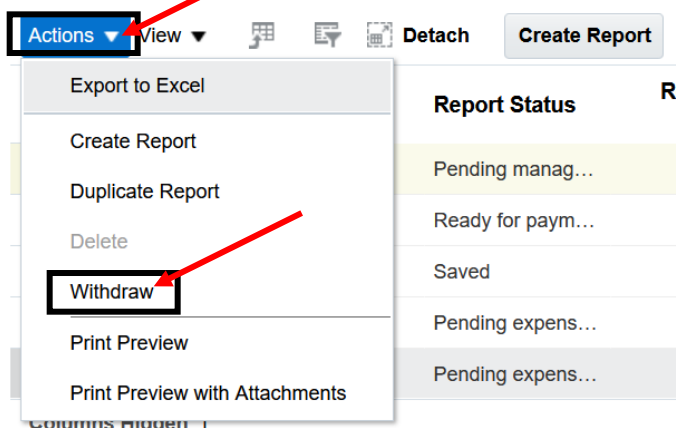
Manage Expense Reports



The table shows a list of expense reports with columns for Report Number, Date, Report Status, Report Total (USD), Purpose, Amount (USD), and Payment Date. The first row is highlighted in blue.

Report Number	Date	Report Status	Report Total (USD)	Purpose	Amount (USD)	Payment Date
GMHEC_EXP_...	18-Aug-2020	Pending manag...	606.00			
GMHEC_EXP_...	05-Aug-2020	Ready for paym...	5.00	Testing Expense		
GMHEC_EXP_...	13-Aug-2020	Saved	20.20			
GMHEC_EXP_...	11-Aug-2020	Pending expens...	100.00	TESTING 20200811		
GMHEC_EXP_...	11-Aug-2020	Pending expens...	2,567.75	Testing Travel & Itemizations		

With the expense report highlighted, click on **Actions**, and then **Withdraw**.



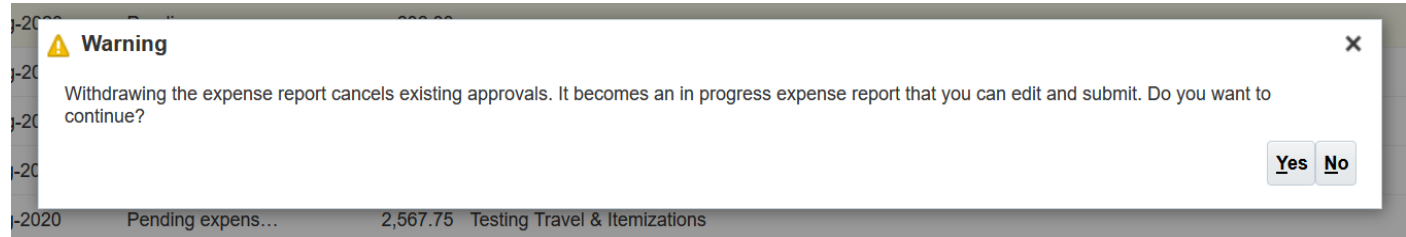
The 'Actions' dropdown menu is open, showing options like 'Export to Excel', 'Create Report', 'Duplicate Report', 'Delete', 'Withdraw', 'Print Preview', and 'Print Preview with Attachments'. A red arrow points to the 'Withdraw' option.

Note: The ability to withdraw is **only** available to expense reports in **Pending Manager Approval** status.

1.3 Alternative method to withdrawing Expense Reports

1.4 Locate Expense Report to withdraw

Click **Yes** on the pop-up box confirming withdrawal of the expense report.



The status of the expense report will display as **Withdrawn**.

GMHEC_EXP_...	18-Aug-2020	Withdrawn	606.00
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After withdrawing the report, changes may be made as needed, then the report can be resubmitted for approval; or it may be deleted completely.

For instructions on how to make changes to items in an Expense Report see the help guides at www.GMHEC.org/Support in the Finance Knowledge Base.

1.4 (Cont.)