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Expense

# Disapproving an Expense Report

 **Courtney O'Reilly**  
March 10, 2020 07:54

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Occasionally, you may need to disapprove an expense report due to policy violations or other issues. A disapproved expense report is sent back to the submitter's **Drafts** folder where they can make edits and resubmit their expense report.

**Step 1:** On your account home page, select the number of items under **My Approval Requests**.

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My Approval Requests

Dan Manager

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My Certify Wallet

0

Your wallet is empty

Add receipts or expenses to your Wallet.

Cash Advance Balance

\$0.00

0 ITEMS

My Expense Reports

New Expense Report

Drafts

Pending Approval

Pending Payment

Archived

Approval Requests

1

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**Step 2:** On the next page, you will see all of the expense reports awaiting your approval. To view a specific expense report, click the **Employee** name or the view (document) icon under the **View** column. This will open the expense report in a new browser window.

My Approval Requests

The following expense reports have been sent to you for approval.

View	Policy	Status	Employee	Submit Date	Start Date	End Date	Expense Report	Total
		Pending	Meredith Employee	10/31/2016	9/1/2016	9/15/2016	ReportExecutive - 9/1/2016 - 9/15/2016	\$410.73
Total								\$410.73

**Step 3:** To disapprove the entire expense report, select **Disapprove Expense Report** next to **Actions**. When you select **Disapprove Expense Report**, a popup will advise you that the expense report will be sent back to the submitter, and will ask you to confirm the disapproval. Click **Yes** to continue the disapproval process.

## Approve Expense Report

Status Pending Approval

Current Approver Dan Manager

Department General & Admin (01)

Summary Meredith Employee [\[v\]](#)

Report Executive - 10/1/2016 -  
10/15/2016

10/1/2016 - 10/15/2016

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### Approval History

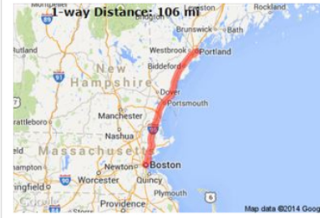
11/10/2016 Submitted Meredith Employee

Pending Dan Manager

[Send Email to All](#)

[Full Approval History](#)

### Receipt Image



### Expenses

[Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
<a href="#">Approve</a> <a href="#">[v]</a>		10/1/2016	Mileage	<a href="#">[check]</a> <a href="#">[v]</a>	119.84	Yes	119.84	No	<a href="#">[receipt]</a>	<a href="#">[v]</a>
<a href="#">Approve</a> <a href="#">[v]</a>		10/3/2016	Lodging	<a href="#">[check]</a> <a href="#">[v]</a>	191.96	Yes	191.96	No	<a href="#">[receipt]</a>	<a href="#">[v]</a>
<a href="#">Approve</a> <a href="#">[v]</a>		10/3/2016	Coffee, Tea, Snacks	<a href="#">[check]</a> <a href="#">[v]</a>	5.82	Yes	5.82	No	<a href="#">[receipt]</a>	<a href="#">[v]</a>
<a href="#">Approve</a> <a href="#">[v]</a>		10/4/2016	Meals - Large Group	<a href="#">[check]</a> <a href="#">[v]</a>	93.11	Yes	93.11	No	<a href="#">[receipt]</a>	<a href="#">[v]</a>

Total Non-Reimbursable \$0.00

Total Personal \$0.00

Total Reimbursable \$410.73

Total Disapproved \$0.00

Total Company Expenses \$410.73

### Confirmation

Disapproving this expense report will send it back to the submitter. Notes added to expenses will be preserved.

Are you sure you wish to disapprove this expense report?

[Yes](#)

[No](#)

**Step 4:** By selecting **Disapprove Expense Report**, an email preview will be displayed where you can enter text for the submitter in the **Enter your comments** in the field provided. Click **Next** to complete the disapproval process.

## Disapprove Expense Report

This is the message that will be sent to the expense report submitter, as well as any previous approvers of this expense report. You may add your own comments if you like. Click Next to disapprove this expense report.

To memloyee@circp1.com

CC dmanager@circp1.com

Subject Expense Report Disapproval From Dan Manager (dmanager@circp1.com)

Body Hello Meredith,

Dan Manager (dmanager@circp1.com) has disapproved an expense report that you submitted.

Enter your comments:



Expense Report Summary

Expense Report Name: ReportExecutive - 9/1/2016 - 9/15/2016  
Dates: 9/1/2016 - 9/15/2016  
Disapproved Total: \$410.73

Login to Certify to view this report.  
Login at: <https://www.certify.com/Login.aspx>

Back

Next

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