How to Modify/Withdraw an Expense Report

*While creating your expense report click **Save** if you want to come back to the report to modify it again. Once you click **Submit**, it is sent to your supervisor and you will no longer be able to modify unless you **Withdraw** the report.*

Important:
If a supervisor or prepay auditor finds an issue in a report they will send it back to the employee, and the employee will need to modify it. There will be NO adjustments made by supervisors or Payroll Coordinators. Expenses will not be paid to the employee until the expense report is approved by the supervisor and Payroll Coordinator.

Contents

Navigation to Modifying a Saved Expense Report

Access PeopleSoft Finance using the following link: https://starfin.wi.gov

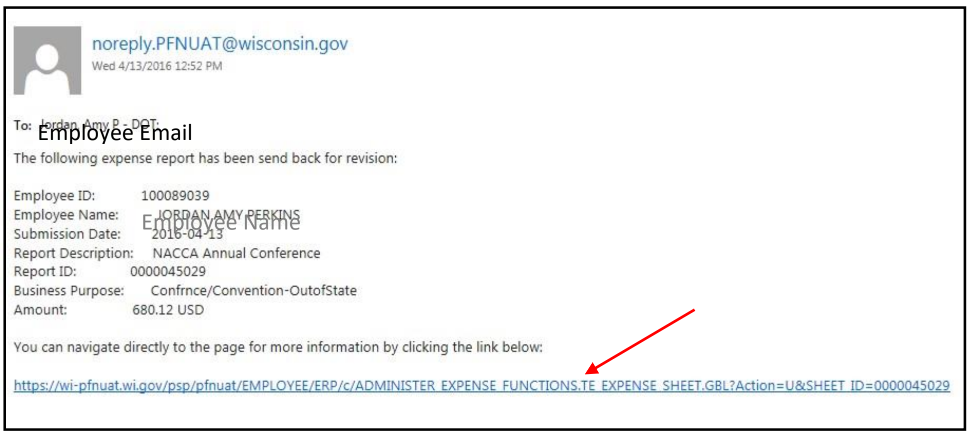
Log in to PeopleSoft Finance using your IAM account.

MODIFYING AN EXPENSE REPORT

This process is used to make changes to expense reports that have been returned for correction or have not been submitted.

Returned Expense Reports

You will receive a system generated e-mail notifying you that your expense report has been sent back for modifications. Click on the link to go directly to your report.


noreply.PFNUAT@wisconsin.gov
Wed 4/13/2016 12:52 PM

To: Jordan, Amy P - DOT; Employee Email

The following expense report has been send back for revision:

Employee ID: 100089039
Employee Name: JORDAN AMY PERKINS Employee Name
Submission Date: 2016-04-13
Report Description: NACCA Annual Conference
Report ID: 0000045029
Business Purpose: Confrnce/Convention-OutofState
Amount: 680.12 USD

You can navigate directly to the page for more information by clicking the link below:

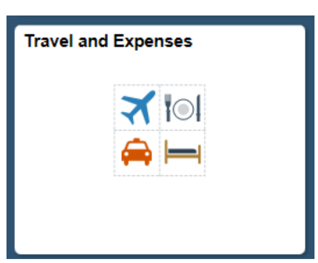
https://wi-pfnuat.wi.gov/psp/pfnuat/EMPLOYEE/ERP/c/ADMINISTER_EXPENSE_FUNCTIONS.TE_EXPENSE_SHEET.GBL?Action=U&SHEET_ID=0000045029

OR

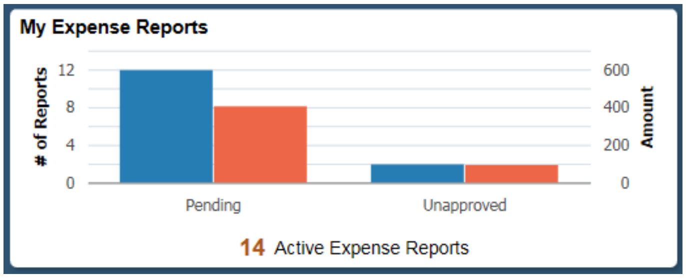
If you did not click on the e-mail link, you can navigate to your report using the steps below.

- **STEP 1:** Navigate to **FSCM Employee Self-Service** Home Page.

- **STEP 2:** Click on the **Travel and Expenses** tile.

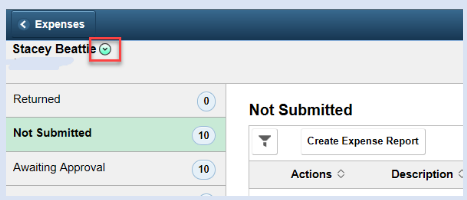


➢ **STEP 3:** Click on the **My Expense Reports** tile.

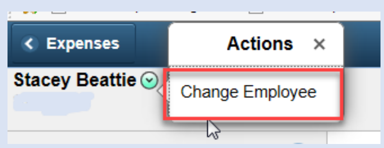


➢ **STEP 4:** Your Name and Employee ID should default in. To continue creating your own Expense Report, please skip to **Step 5**.

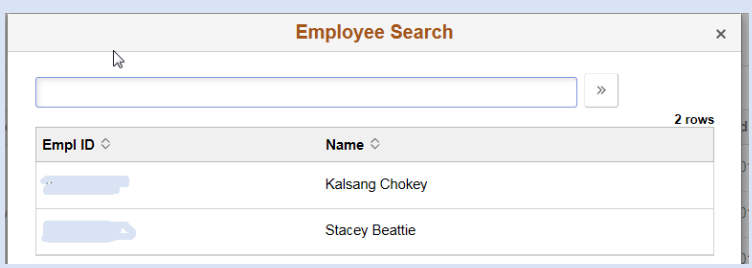
If you are entering as a delegated user for other employees, click on the green circle with the downward arrow.



Click on **Change Employee**.

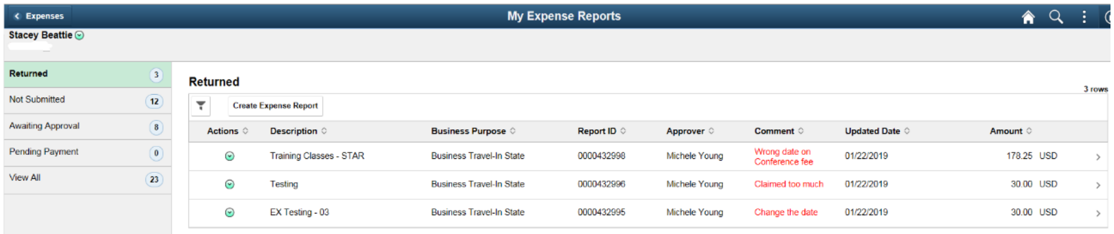


A listing of the employees that you have the authority to enter for will be displayed. You can also search for an employee if you are a delegated enterer for multiple employees by entering the name in the search box.



Select the appropriate name from the listing.

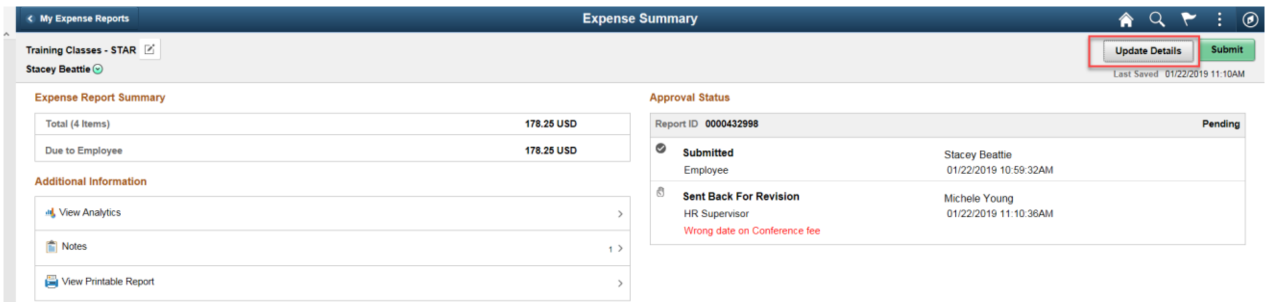
➢ **STEP 5:** If expense reports have been returned, that category will be expanded, and those expense reports will be displayed.



The Comment field will be populated in red with the reason that it was sent back.

- **STEP 6:** Click on the expense report that you wish to modify.

- **STEP 7:** The Expense Summary page will be displayed. You again can see the reason it was sent back, shown in **Red Lettering**. Click on the **Update Details** to go to the details page.

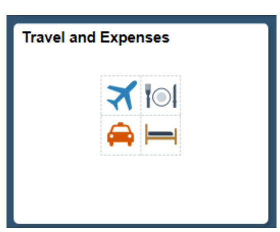


- **STEP 8:** Continue to review your expense report, make any necessary changes/additions and submit the expense report when ready to submit for approval.

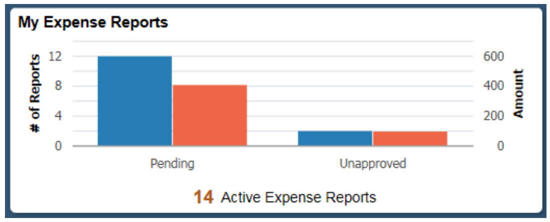
Saved but Not Submitted Expense Reports

- **STEP 1:** Navigate to the **FSCM Employee Self-Service** Home Page.

- **STEP 2:** Click on the **Travel and Expenses** tile.

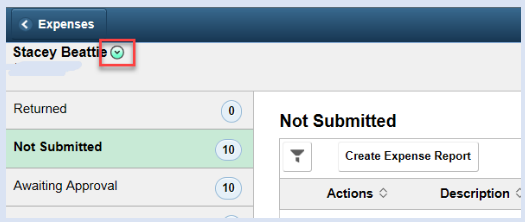


➢ **STEP 3:** Click on the **My Expense Reports** tile.

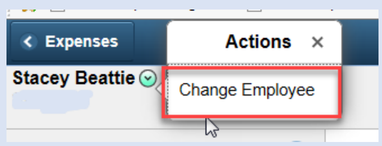


➢ **STEP 4:** Your Name and Employee ID should default in. To continue creating your own Expense Report, please skip to **Step 5**.

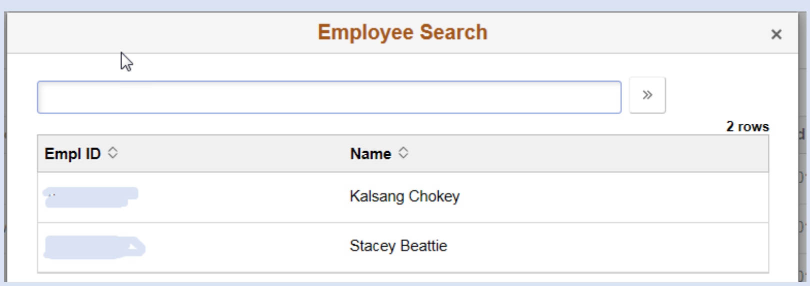
If you are entering as a delegated user for another employee, click on the green circle with the downward arrow.



Click on **Change Employee**.



A listing of the employees that you have the authority to enter for will be displayed. You can also search for an employee if you are a delegated enterer for multiple employees by entering the name in the search box.

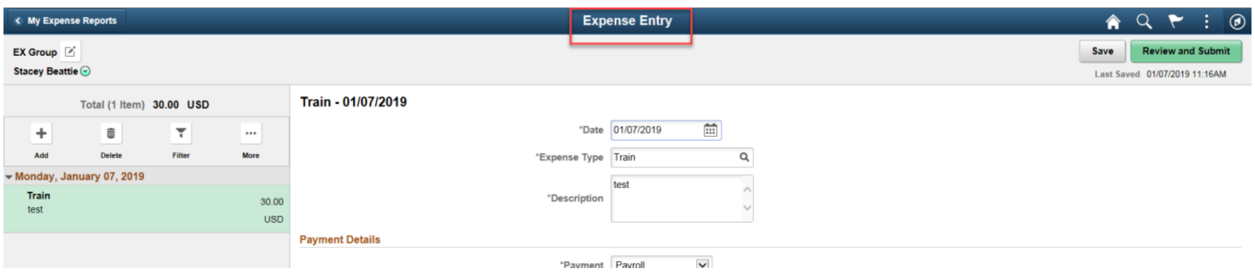


Select the appropriate name from the listing.

➢ **STEP 5:** If the expense report has not been submitted, it will be in the Not Submitted Category. If there are expense reports in the Returned Category, they will display first. To view expense reports in the Not Submitted category, click on the **Not Submitted** Category. That category will be expanded, and those expense reports will be displayed.

- **STEP 6:** Click on the expense report that you wish to modify.

- **STEP 7:** It will take you to the Expense Entry detail page.



- **STEP 8:** Continue to review your expense report, make any necessary changes/additions and submit the expense report when ready to submit for approval.

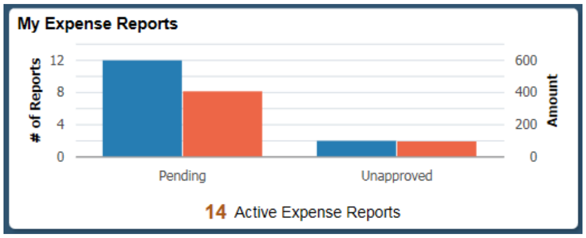
Withdraw a Submitted Expense Report to Modify

If you have submitted an expense report, but the realize you missed something or need to revise something, you can **Withdraw** your report if your supervisor has not approved it yet. Once the report is approved by your supervisor, you will have to contact the Prepay Audit team at DOTTRAVELExpenses@dot.wi.gov to request the report be sent back.

- **STEP 1:** Navigate to the **FSCM Employee Self-Service** Home Page.

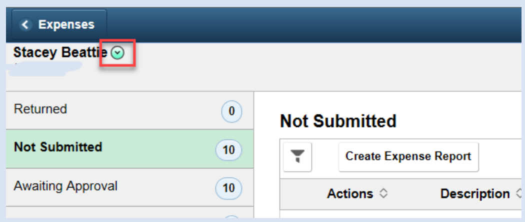
- **STEP 2:** Click on the **Travel and Expenses** tile.

➢ **STEP 3:** Click on the **My Expense Reports** tile.

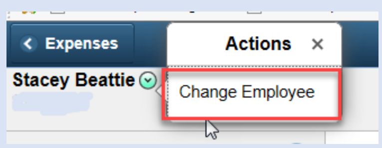


➢ **STEP 4:** Your Name and Employee ID should default in. To continue creating your own Expense Report, please skip to **Step 5**.

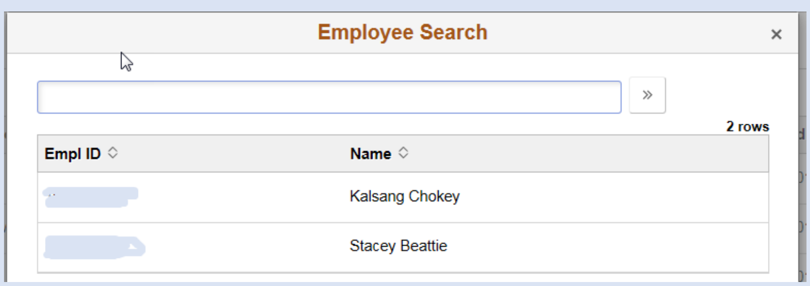
If you are entering as a delegated user for another employee, click on the green circle with the downward arrow.



Click on **Change Employee**.

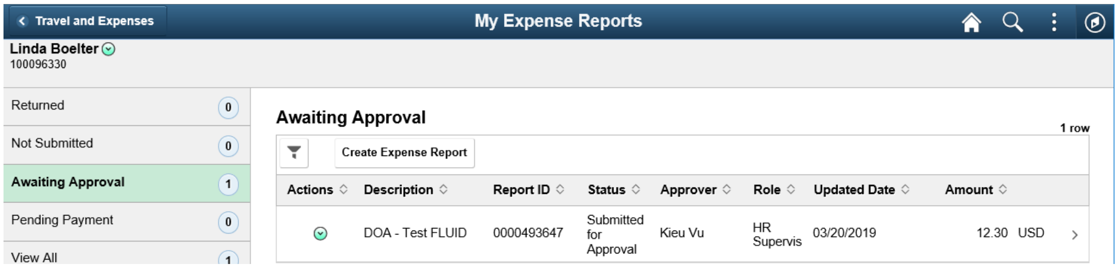


A listing of the employees that you have the authority to enter for will be displayed. You can also search for an employee if you are a delegated enterer for multiple employees by entering the name in the search box.



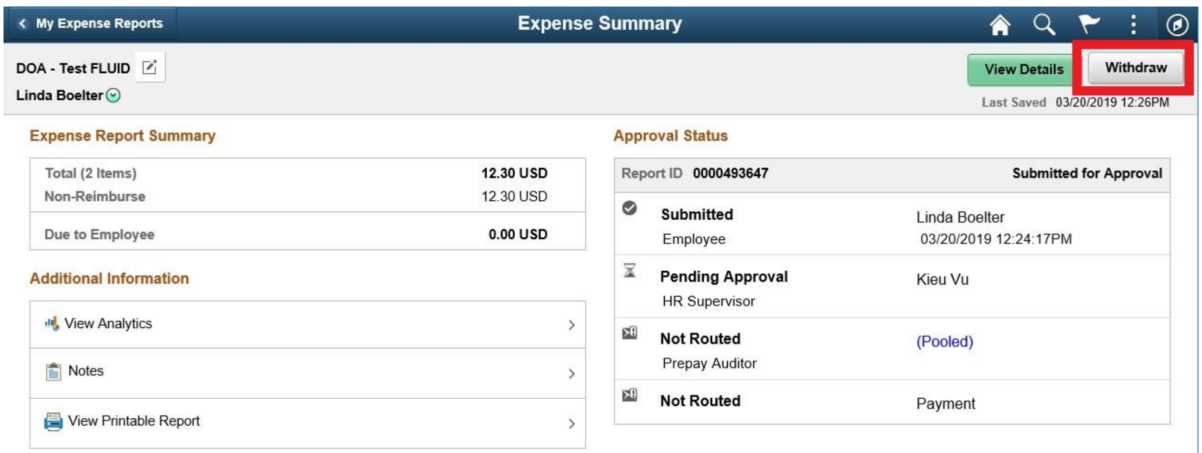
Select the appropriate name from the listing.

➢ **STEP 5:** If the expense report has been submitted but has not been approved by a supervisor, it will be in the **Awaiting Approval** Category. If there are expense reports in the Returned Category, they will display first; followed by those that are Not Submitted. To withdraw a report or to view expense reports in the Awaiting Approval category, click on **Awaiting Approval**. That category will be expanded, and those expense reports will be displayed.

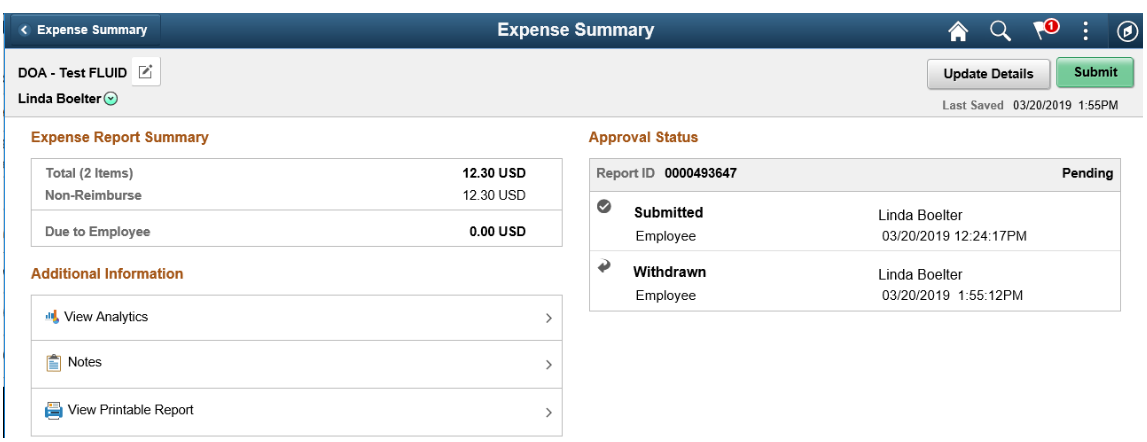


➢ **STEP 6:** Click on the expense report that you wish to withdraw or view.

➢ **STEP 7:** The Expense Summary detail page will appear, where you can choose to **Withdraw** the report or View Details.



➢ **STEP 8:** You will notice the Approval Status area on the right side of the summary page has changed from Pending Approval to Withdrawn and the buttons at the upper right has changed to **Update Details** and **Submit**.



Clicking on the **Update Details** button will take you to Expense Entry page where you will make your modifications and resubmit. Continue to review your expense report, make any necessary changes/additions and **Submit** the expense report when ready to resubmit it for approval.