MUNIS
END USER GUIDE

EMPLOYEE EXPENSE CLAIMS

Table of Contents

Legend of Munis Buttons 3

Employee Expense Claims 9

Process Flow Overview 9

Estimated Travel Expenses 10

How to Enter Your Estimated Travel Claim 18

Actual Travel Expenses 23

How to Enter Your Actual Travel Expenses 28

How to Attach a Document 33

How to Attach a Document that is Saved to Your Computer 33

How to Attach a Document by Direct Scan 37

Expense Claim Approvals 40

What Approvals are Required on an Estimate Travel Claim? 40

What Approvals are Required on an Actual Expense Travel Claim? 42

How do I Approve a Claim? 42

Legend of Munis Buttons

The following table provides descriptions for the Munis ribbon groups and buttons. If a button is dimmed on a program screen, the selection is not available.

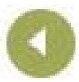
Button	Description
Confirm	
 Accept	Accept saves information after you create or update a record. This button is often highlighted when adding, updating, or searching for records.
 Cancel	Cancel ends an operation, such as adding or updating a record.
Search	
 Search	Search finds records in a program. Search is often used to create an active set of records before proceeding to another step, such as printing a report, purging records, or posting invoices. In many cases, you can use wildcard characters to further define a search.
 Browse	Browse is available when an active set of records exists, or after an active set is created using the Search or Define buttons. The browse screen displays a list of all the records in the active set. You can sort, view, or export data from the browse screen. On a browse screen, the Excel button exports the data directly to a Microsoft® Excel spreadsheet.
 Query Builder	Query Builder creates a query based on an expression or mathematical equation. This option assists in finding records that meet very specific criteria, but that cannot be defined by entering data directly into a field. When you click Query Builder, the Query Wizard screen (similar to the expression builders found in

Button	Description
	Microsoft Excel or Microsoft Access) provides options for creating an expression based on the fields in the active program.
Actions	
 Add	Add enters a new record into the database. When you click Add, entry fields become available with the cursor positioned in the first field. The program may place default values in fields to save you keystrokes, but typically you can replace the default values. Press **Tab** to move from field-to-field or select a field with the pointer. When the cursor is in a field, helpful information often displays at the bottom of the screen. Some fields have an additional help button that lists available field entries.
 Update	Update adds data or changes existing data in a record. You can change data in any active field. Fields that are not active typically are part of the record key. The key is the field or combination of fields that uniquely identifies the record from all other records. If you need to change data in a key field, you must delete the record and enter it again.
 Delete	Delete removes the record currently displayed from the program. If the record is being used by another process, you cannot delete it. Once you delete a record, you cannot recover it.
 Global	Global provides the option for updating or deleting multiple records at one time. Click the down arrow to access the global options available in the active program.
 Duplicate	Duplicate creates a copy of data and creates a new record in the same program using the original data as a base. Once you duplicate data, you can modify the new record.
Output	

Button	Description
Print	Print sends a report directly to your default printer. In many instances, this output option provides the Output dialog box, which provides you with multiple print settings and options. If a program has specific output sort options or types, the program provides the appropriate options box when you click Output Options.
Text File	Text File saves a report to a file in the Munis spool directory. After saving, you can display or print the report from the Saved Reports program. The Saved Reports program is available on the Departmental Functions menu. To use the spool function from the File menu in a specific program, click Output and then select File under Output Type.
PDF	PDF creates the report in PDF format. The program opens the document in the installed PDF reader. **Note:** The PDF button is only accessible if the Output to PDF permission is granted in Munis System Roles for at least one role assigned to your user ID.
Preview	Preview immediately displays a report on the screen. For this option, the program provides the report in HTML format with no page breaks.
Office	
Excel	Excel exports the active set of records to a Microsoft Excel spreadsheet. • If you click Excel from a browse screen, the program immediately exports the data and opens the Microsoft Excel application. • If you click Excel from a master program or subprogram screen, the program displays the Export Filter screen. Use this screen to specify the data field values to export to Microsoft Excel. When you click Save and Exit, the program opens Microsoft Excel with the selected data in the active worksheet.

Button	Description
	In each case, the program inserts hyperlinks to the individual Munis records. The file created during export is automatically saved to your Munis directory; use the Save As feature in Excel to save the file to a new location.
Word	Word creates an active set of records to export into Microsoft Word. It is especially useful for spooled reports. This option enables you to format the report in Microsoft Word prior to printing.
Email	Email creates an email message that contains a hyperlink to the active record. When the email recipient clicks the hyperlink, Tyler Dashboard opens, and in turn opens the Munis program with the linked record as the current record. **Note:** This feature requires that the Tyler Dashboard be enabled.
Schedule	Schedule displays the Appointments screen, which schedules meetings that are associated with the active record. When you click Add on the Appointments screen, the program creates an email message containing meeting start and end times, and a meeting description. You can define the meeting times and modify the description, as appropriate. When the email recipient accepts the meeting, it is automatically added to his or her Exchange calendar.
Tools	
Attach	Attach allows you to view, add, or delete documentation related to the current record. • If your organization uses Tyler Content Manager (TCM), the Attachments option displays a Document Mappings dialog box. When you select an available mapping, the program opens TCM. • If your organization does not use Tyler Content Manager, the Attach option provides a Munis Attachments screen, where you

Button	Description
	can add or access documentation from your Munis server. If you change the original document, the attachment is not automatically updated. To keep attachments current, you must update the original documents and manually attach the updated files. **Note:** This option is accessible only if the View Attachments and Associated Documents check box is selected in the Roles – Munis System program. In addition, the TylerCM for Munis Settings program must get setup to accommodate your attachments preference.
 Notes	Notes provides the option for adding or updating notes for the selected record. If more than one type of Notes options are available, click the down arrow to select the applicable notes option and add or update a note using the Text Editor program.
 Notify	Notify provides integration with the Tyler Notify program, which provides options for contacting Munis customers by telephone, email, or text message using predefined content. **Note:** This feature is only available if your organization has installed and implemented Tyler Notify.
 Audit	Audit provides the audit history for the selected record.
 MapLink	MapLink provides integration of map data sources with Munis programs. The MapLink application is not launched as an interactive application; however, you are able to view a data set in Munis that has been modified during a MapLink session. Click the down arrow for MapLink options.
 Alerts	Alerts allows you to add or view all reminder alerts or reminder alerts for the current record. Reminder alerts distribute emails at specified dates as a reminder of upcoming events or activities that require attention. Reminder alerts are established using the Alert Administration programs on the System Administration menu. The Alert programs are

Button	Description
	not available for use with all Munis programs. Click the down arrow to manage alerts.
Menu	
 More	The Menu group provides options specific to managing data in the active program and options for accessing related programs. The options in this group vary by program; for programs with multiple options, click the More arrow to view the complete list.
Return	
 Return	Return closes the current screen and returns you to the previous screen of the active program.

Employee Expense Claims

Within this section, you will learn:

- ✓ How to your estimated travel expense.
- ✓ How to enter your actual travel expense.
- ✓ How to approve a travel expense claim.
- ✓ How to attach documents to your travel expense claim.

Process Flow Overview

The Employee Expense module is designed to facilitate the entire employee travel, approval and cash advance processes. Employees who have an upcoming work-related trip will need to submit a claim in the Munis system, which will trigger the required workflow approvals.

Prior to the trip, the employee will enter the estimated cost of their trip into Munis screen and when they return home from their trip, they will have 30 days to submit their final expense claim.

When the final expense claim is submitted, one of the following 3 situations will apply:

1. Your actual claim is greater than the cash advance you received

In this scenario, when you finish entering the actual claim it will be sent through workflow for approvals before you receive your check. . (i.e.: review for available budget, AP approval, CFO approval, COO approval if applicable, Chairman approval if applicable, issue payment to employee, etc.)

2. Your actual claim is the same amount as the cash advance

After the Department Admin verifies your actual claim, no further action is required.

3. Your actual claim is less than the cash advance

What this means is you need to submit the difference between the estimate and the actual amount to the County. After the Department Admin reviews your actual claim, the transaction will be forwarded to AP and AP will process an “overpayment” in Munis. You will have 15 days to reimburse the County using cash, check, or money order. If you do not attempt to reimburse the County, then the amount will be deducted from your pay check.

Estimated Travel Expenses

Prior to a trip, please use an existing Excel claim form to estimate costs (hotel, conference, airfare, etc.). In Munis, create an expense claim and attach your Excel claim form as supporting documentation. Once the transaction is saved in Munis, the claim will be in the "estimated created" status mode.

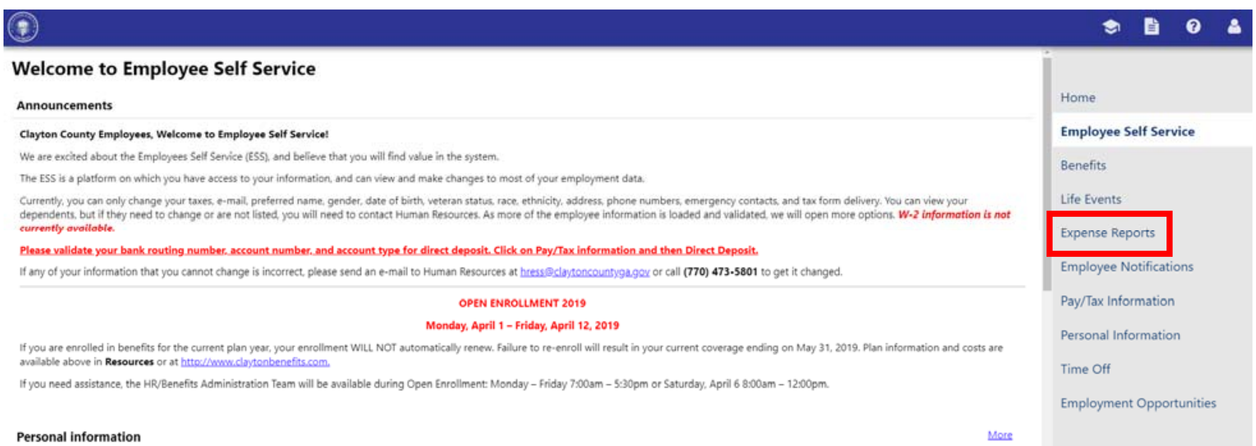
How to Enter Your Estimated Travel Claim in ESS (Employee Self Service)

Employees can now enter their own travel claims through ESS and have administrative personnel in their departments finish the claim and submit them to Finance for payment.

1. Go to ESS at the following website: https://selfservice.claytoncountyga.gov.

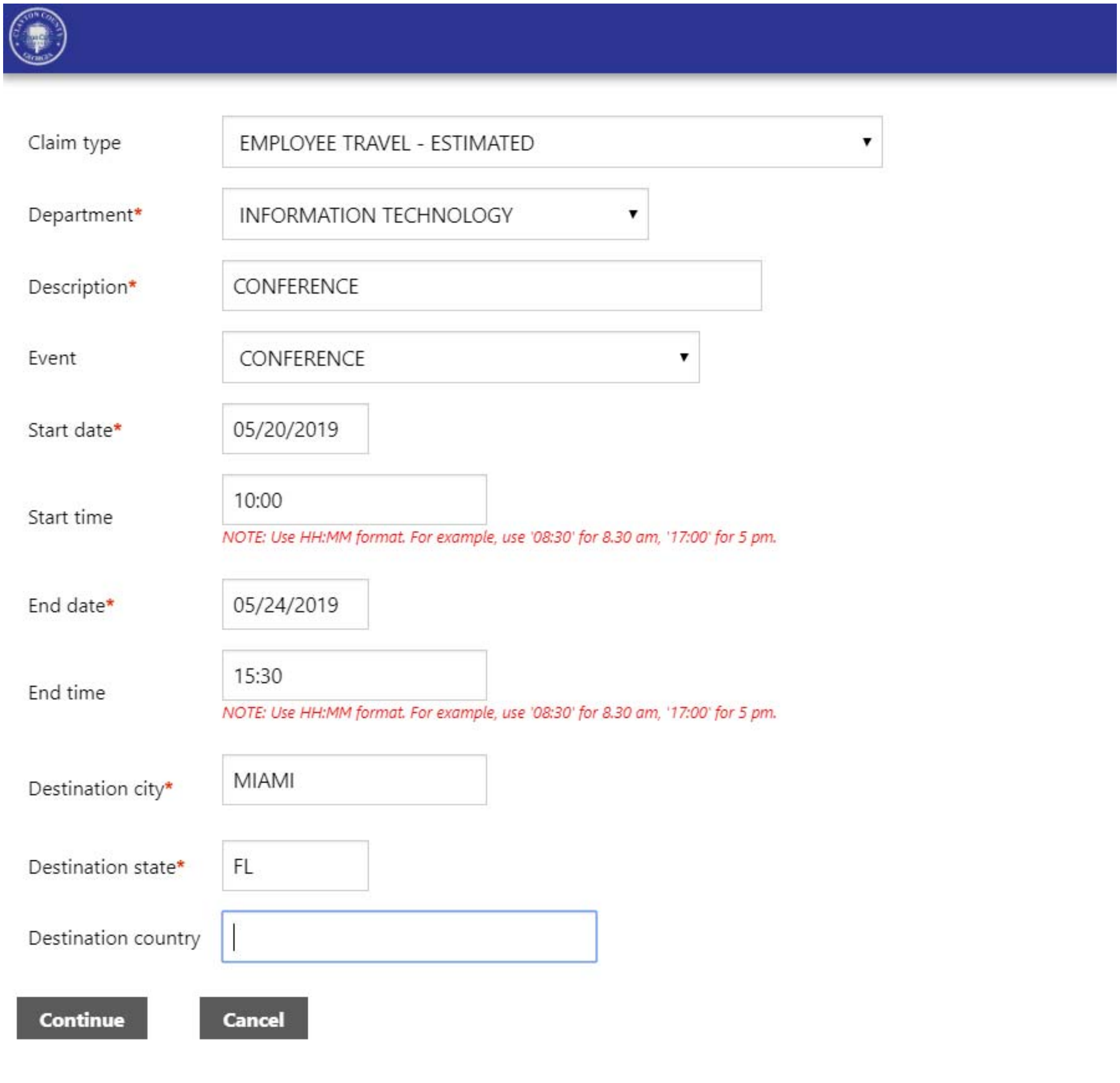
2. Log in using your employee number and password. If this is the first time logging in, your password will be the last 4 digits of your social security number. If you have issues logging on to ESS, please send an e-mail to Human Resources at hress@claytoncountyga.gov or call (770) 473-5801.

3. Click on **Expense Reports**.



4. Click **Add a new claim.**

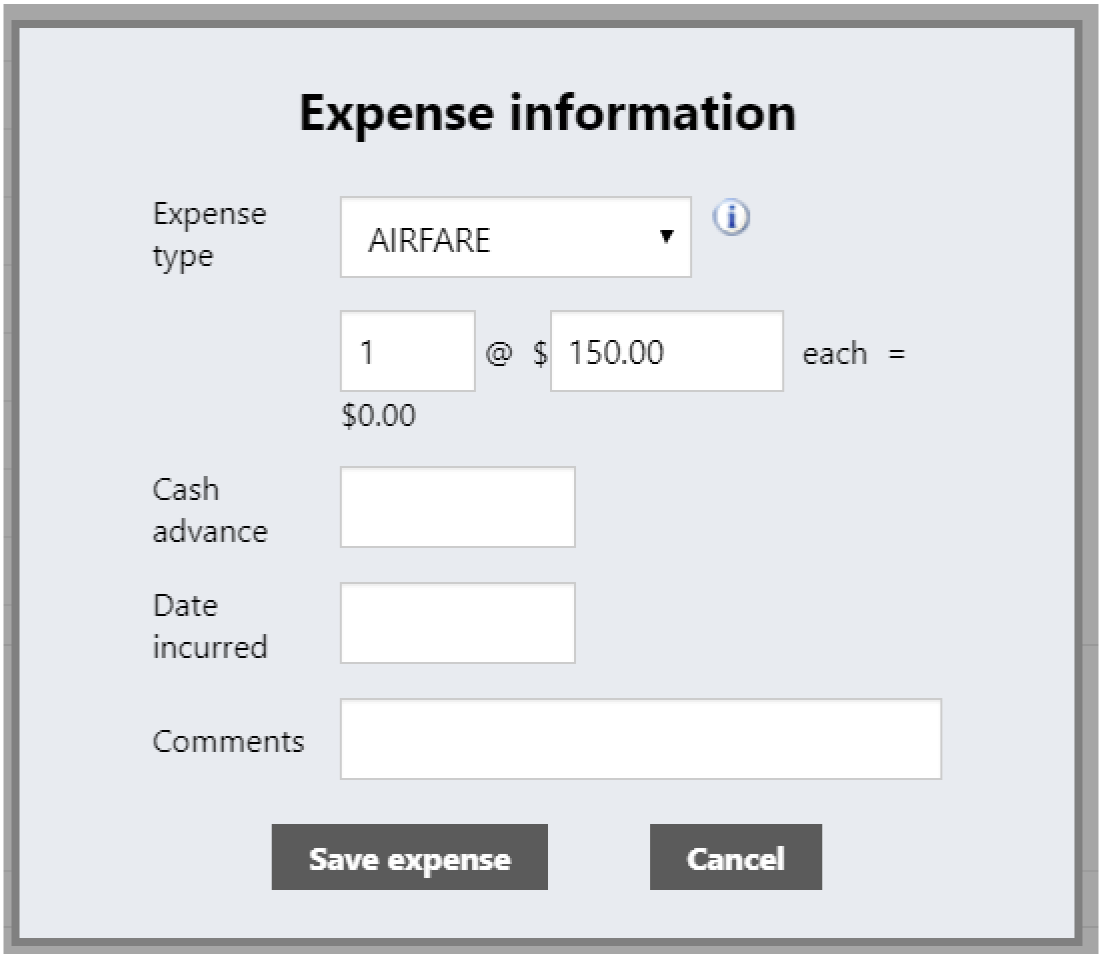
5. Enter your claim type as **EMPLOYEE TRAVEL – ESTIMATED,** your department, a description, Start date of travel, Start time (please be specific if you are flying to your destination), End date of travel, End time, Destination City and State. Click **Continue.**



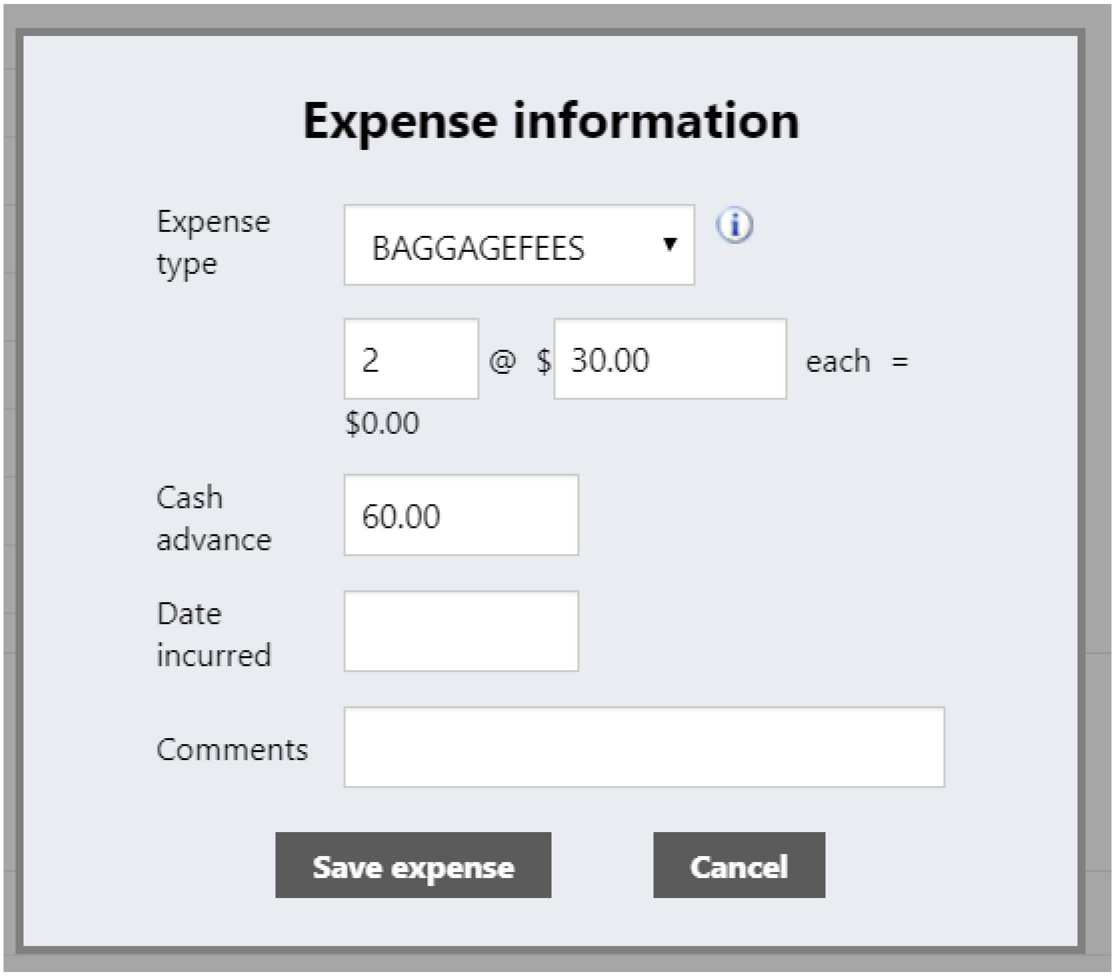
6. Click on the + beside **Unit Expenses.** Then click **Add an expense.**

7. Enter expenses as needed. Click **Save expense** after each type entered.

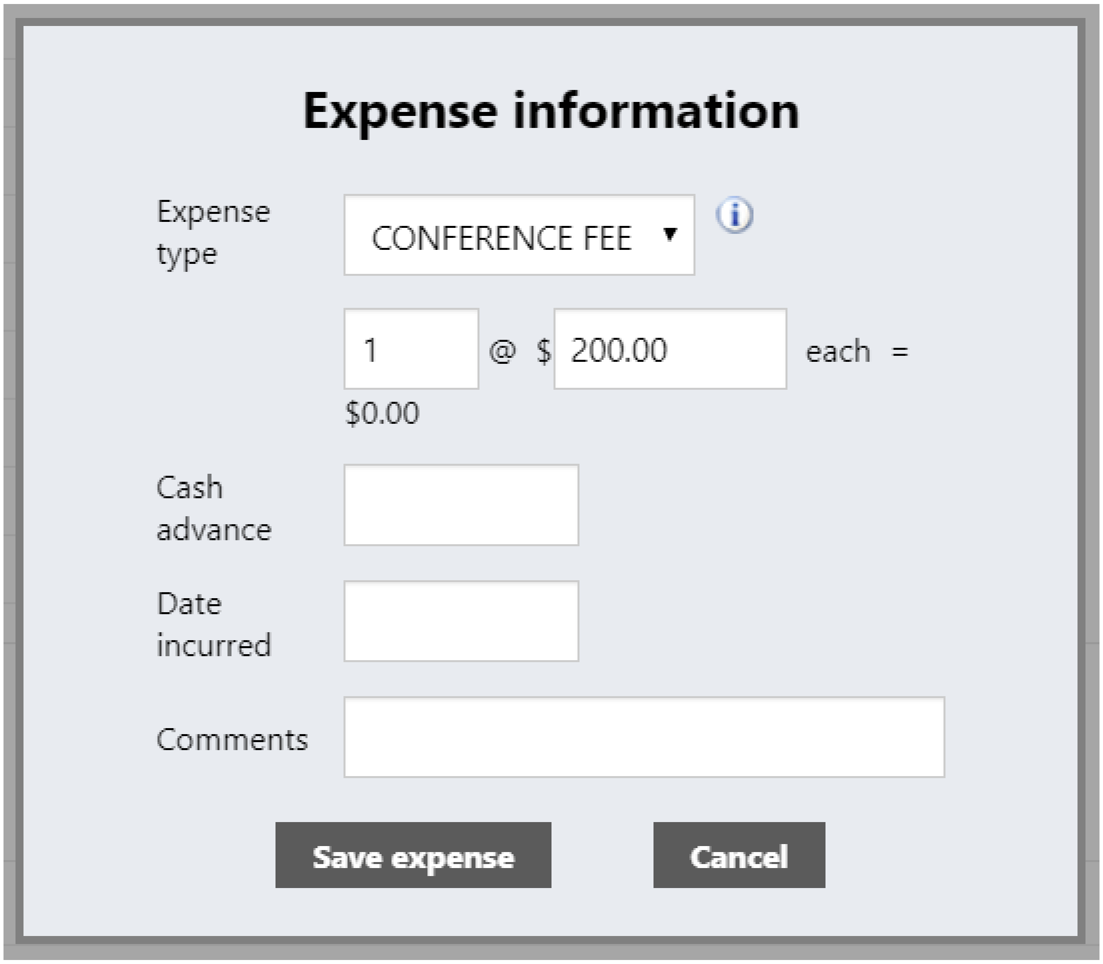
   a. **Airfare:** Should be entered as one expense, with the amount being the cost of the airline ticket.



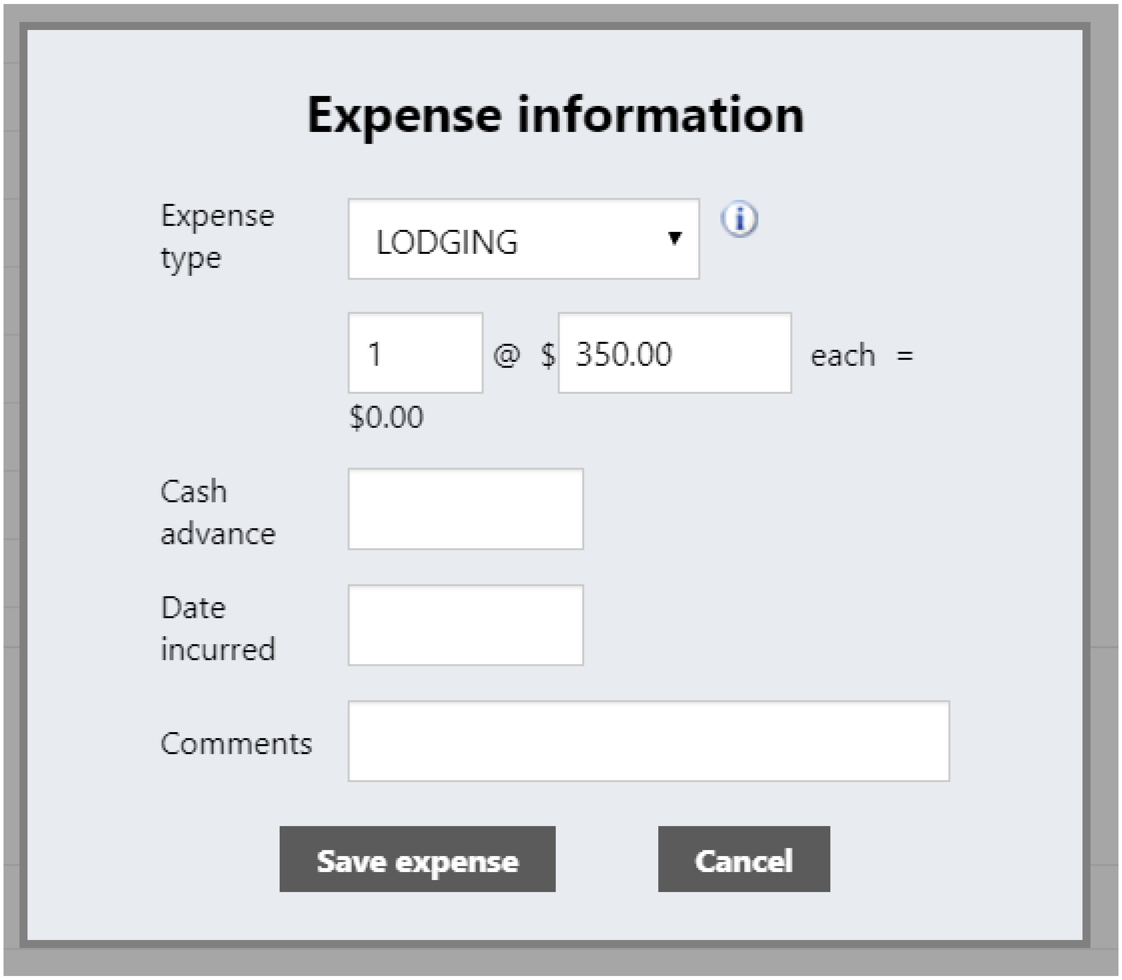
b. **Baggage Fees:** Should be entered as 2 (1 for departure, 1 for returning) at the cost of the airline baggage fee. Enter **Cash Advance** of total amount to be given to the employee.



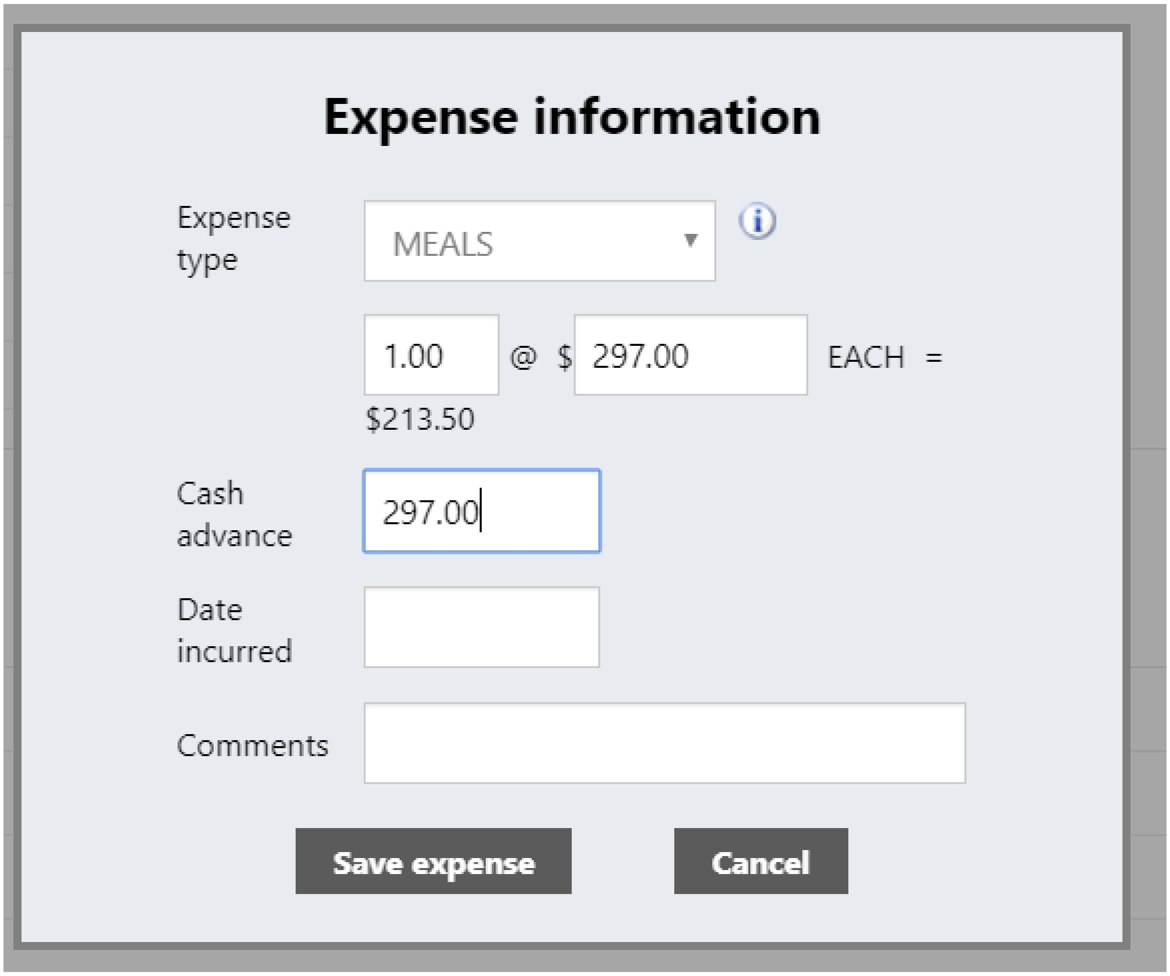
c. **Conference Fee:** Should be entered as one expense, with the amount being the cost of the conference fee.



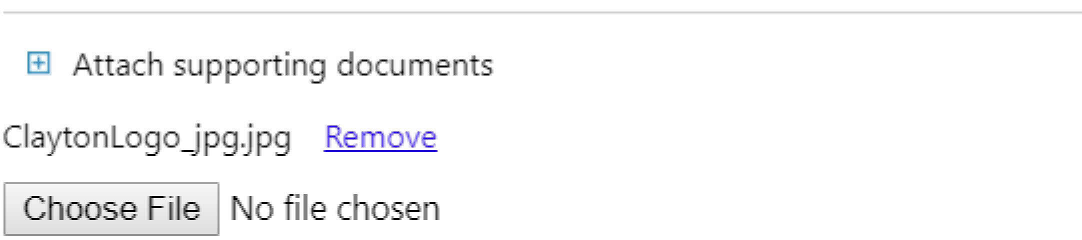
d. **Lodging:** Should be entered as one expense, with the amount being the cost of the lodging.



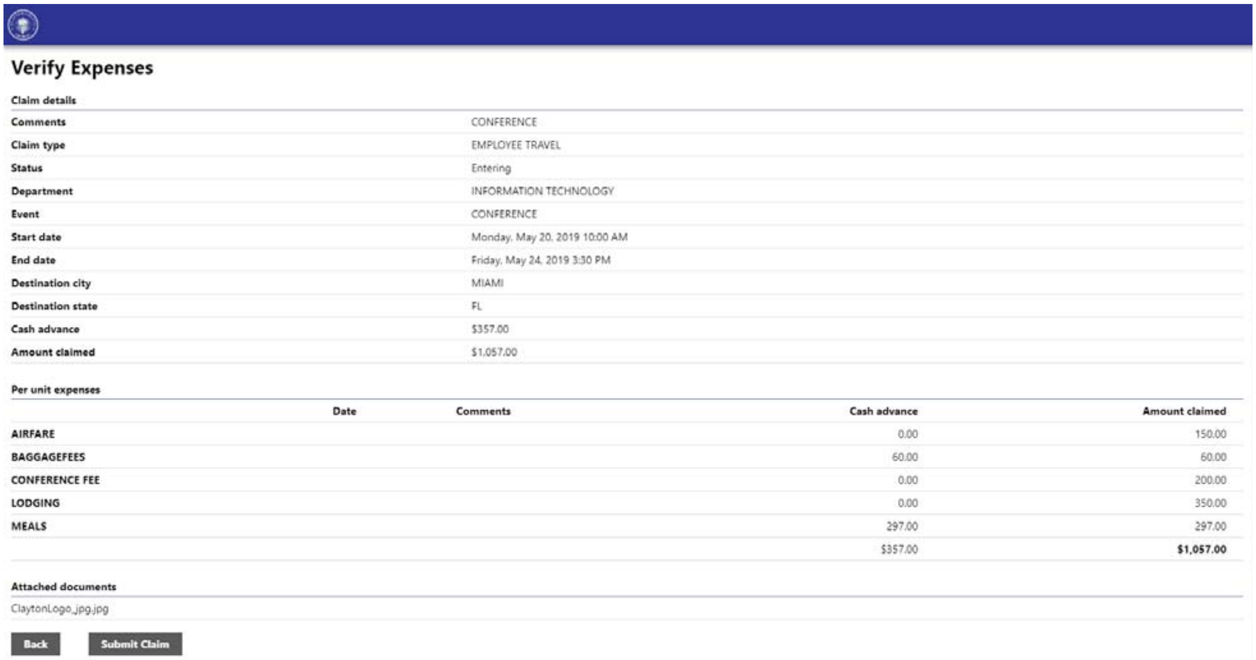
e. **Meals:** Should be entered as one expense, with the amount being the full amount of the per diem. Enter the **Cash advance** of total amount to be given to the employee. This information can be found on the GSA website (https://www.gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-lookup). The employee gets paid 75% of the rate on the first and last day, and subtract $5 from the total amount. In this case Miami's meal per diem is $66 a day with $49.50 on the first and last day (49.50 + 66 + 66 + 66 + 49.50 = 297)



8. Click the **+** beside **Attach supporting documents.** Click **Choose File** to upload your required documents.

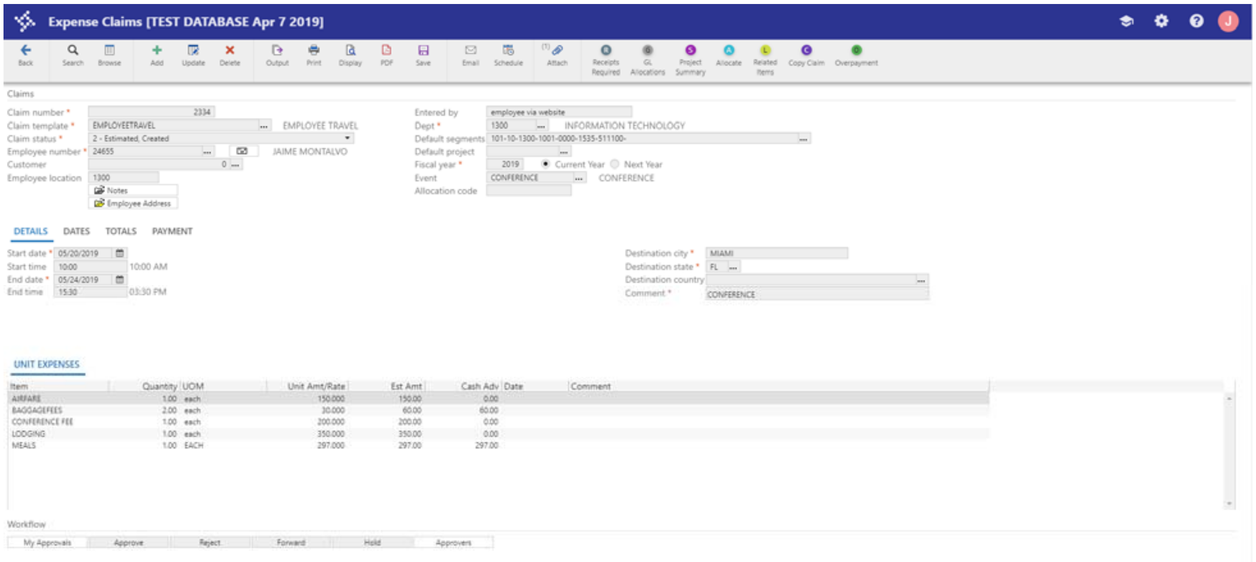


9. Click **Review.** Verify all the information placed in your claim. Once verfied, click **Submit Claim.**



10. Once the claim is submitted, you will receive a confirmation message, with your claim number at the top. Be sure to give this claim number to your administrative personnel who handle the claims in your department.

11. If you are the administrative personnel for your department, login to Munis, search for the employee's claim by entering the claim number, and skip to step 13 below.



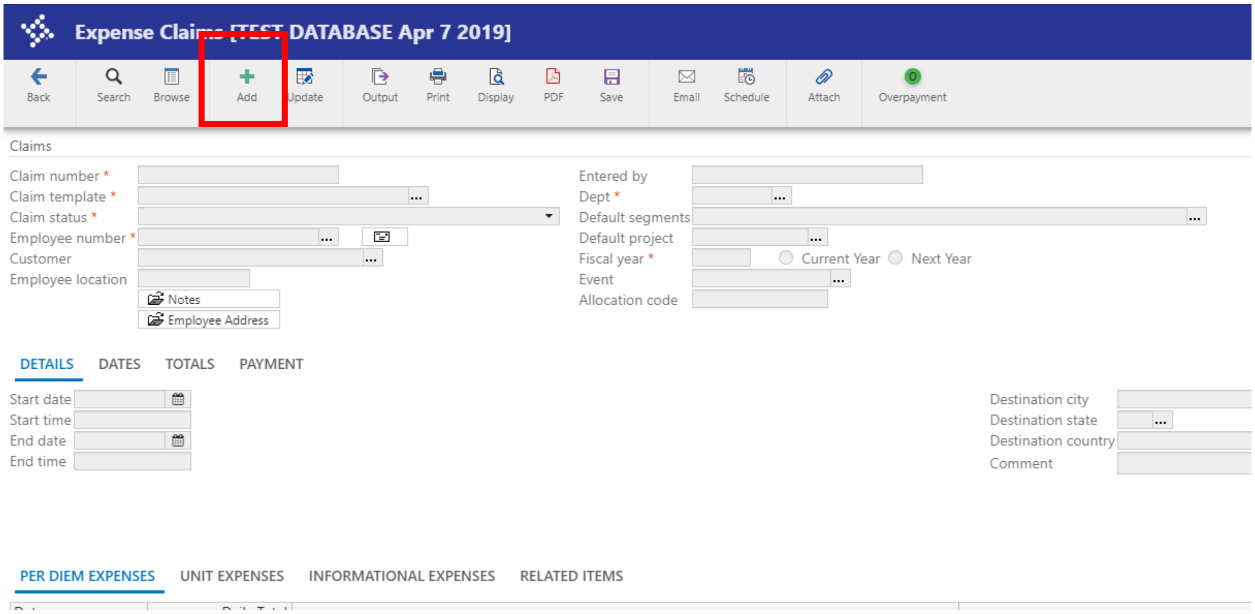
How to Enter Your Estimated Travel Claim in Munis

To enter estimated claims, follow the steps below:

1. Click on the **Tyler Menu.**

2. Click on **Financials > Employee Expense > Expense Claims**.

3. Click on **Add.**



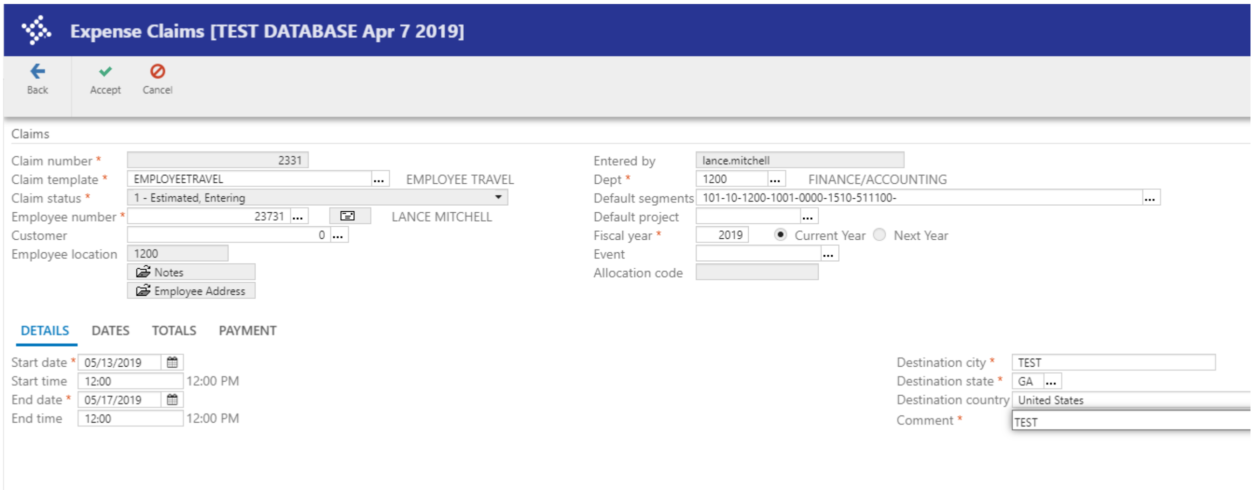
4. Click on the **Field Help** button to the right of the **Claim Template** field**.** There are several templates which have been pre-defined by the County. Each template represents a type of expense you are claiming. Please choose the one that best describes your circumstance. As an example, we are going to select the Travel option.

5. Enter the **Employee Number** for the person who will be traveling**.** If you do not know the Employee Number, you will be able to use the **Field Help** to look it up.

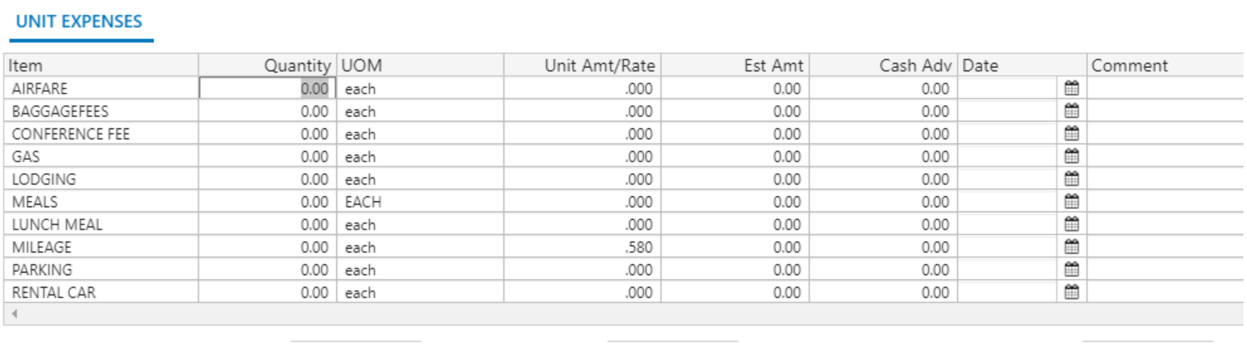
6. Enter **Start Date, Start Time, End Date** and **End Time.**

7. Enter the **Destination City & Destination State.**

8. Include **Comment** (purpose of the trip). If you're traveling to multiple cities in one trip, type "Multiple Cities" and include the destination information. (You can select any one of your destinations to enter into the Destination City and Destination State fields)



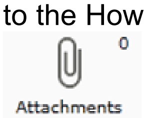
9. Enter estimates and cash advance amounts in the **Unit Expense** section.



UNIT EXPENSES

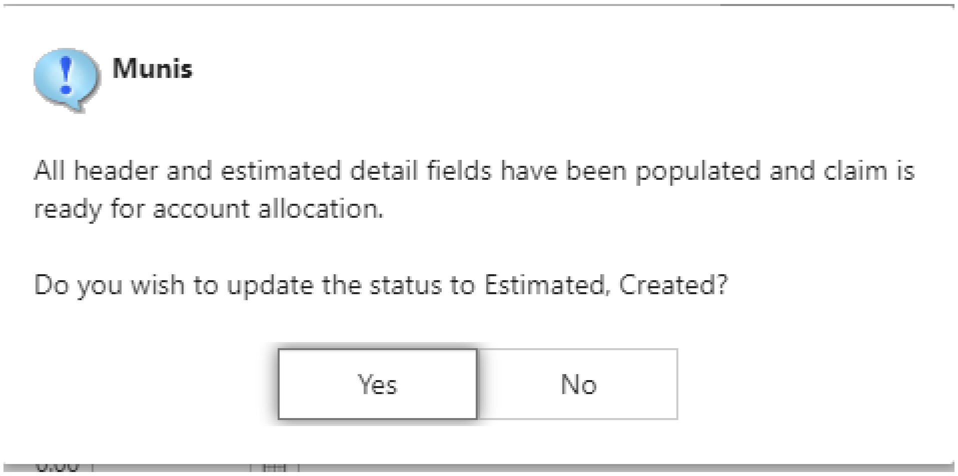
Item	Quantity	UOM	Unit Amt/Rate	Est Amt	Cash Adv	Date	Comment
AIRFARE	0.00	each	.000	0.00	0.00		
BAGGAGEFEES	0.00	each	.000	0.00	0.00		
CONFERENCE FEE	0.00	each	.000	0.00	0.00		
GAS	0.00	each	.000	0.00	0.00		
LODGING	0.00	each	.000	0.00	0.00		
MEALS	0.00	EACH	.000	0.00	0.00		
LUNCH MEAL	0.00	each	.000	0.00	0.00		
MILEAGE	0.00	each	.580	0.00	0.00		
PARKING	0.00	each	.000	0.00	0.00		
RENTAL CAR	0.00	each	.000	0.00	0.00		

10. Click on the **Attach** button to attach your Excel claim form to your Munis expense claim. Refer to the How to Attach a Document section for more information on how to attach a document.



11. Click **Accept**.

12. You will then be asked if you would like to update the status of the claim to 2 – “Estimated, Created”

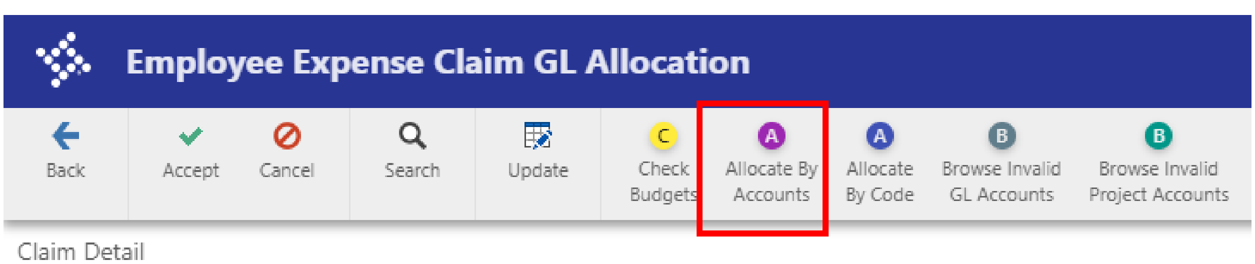


a. If you click "**Yes**" – the claim will move into 2 – "Estimated, Created" status which will notify the designated Departmental Admin that the claim is ready for review. You will no longer be able to make any updates to the claim.

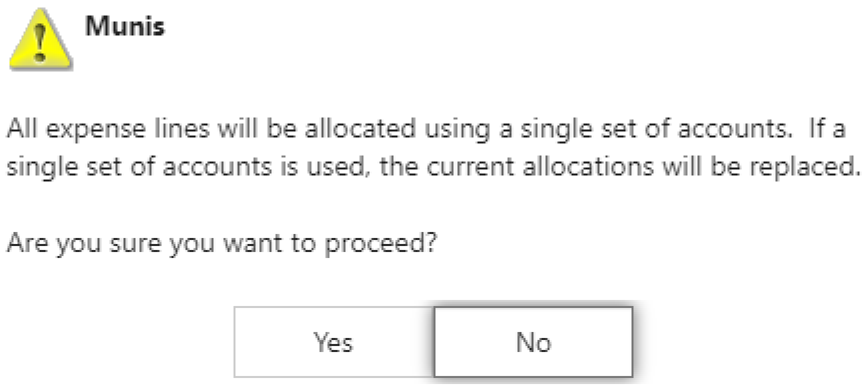
b. If you click "**No**" – the claim will remain in the 1 – "Estimated, Entering" status which will allow you to make more updates until you are ready to notify the designated Departmental Admin. The information already entered by you will be saved so that you can make additional changes.

13. Click **Allocate** in the Ribbon at the top of the screen.

14. Click **Allocate by Account**. Currently, the County does not have any allocation codes set up, therefore, you will not need to use Allocate by Code.



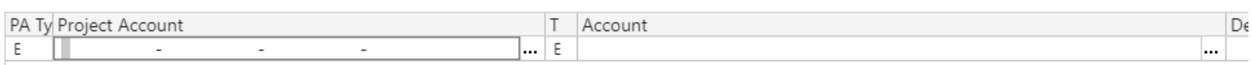
15. You will be asked if you would like to proceed. Click **Yes**



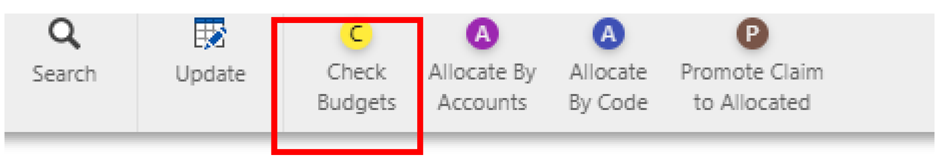
16. Use the Field Help ... menu to either select the **Project Account** or **Account.** You will only use Project Account is your Expense Claim is related to a project.

    a. If you are entering a project account, ensure that the PA Type is set to E for Expense. Once the project account is entered, the General Ledger account will default.

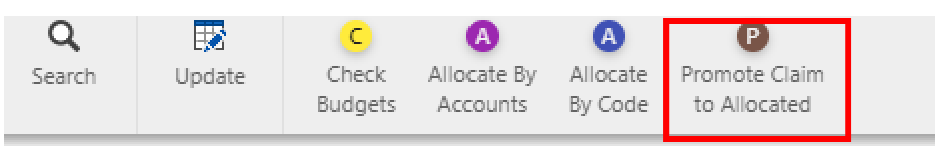
    b. If you are not entering a project account, you will only need to complete the General Ledger account information. Ensure that the T (Type) field is set to E for Expense.



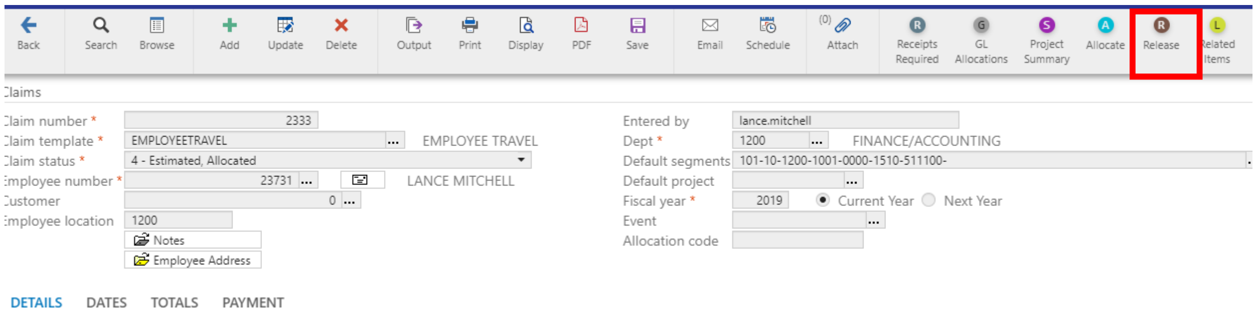
17. Click on **Check Budgets**



18. Click **Promote Claim to Allocated** to allocate the claim.



19. Select **Release.**



20. If you verify "**Yes**" to release the expense claim, the workflow will automatically forward the transaction to the designated Departmental Admin for verification.

Actual Travel Expenses

After you return from your trip, you have 30 days to submit the final claim. You will open your existing claim in Munis, which in in a status mode of "estimate complete" and update it with the actual expenses. You will then need to attach your receipts using Tyler Content Management (TCM) tools.

Once you save you Claim, the system will change the status to "actual entered".

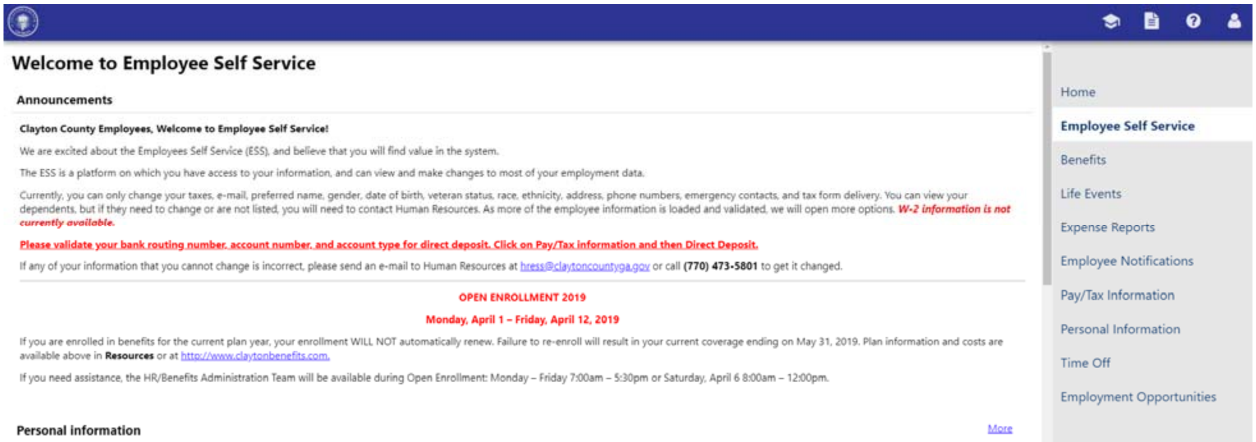
How to Enter Your Actual Travel Expenses in ESS

Employees can now enter their own travel claims through ESS and have administrative personnel in their departments finish the claim and submit them to Finance for final payment.

1. Go to ESS at the following website: https://selfservice.claytoncountyga.gov.

2. Log in using your employee number and password. If this is the first time logging in, your password will be the last 4 digits of your social security number. If you have issues logging on to ESS, please send an e-mail to Human Resources at hress@claytoncountyga.gov or call (770) 473-5801.

3. Click on **Expense Reports**.



4. Your entered claims will be displayed. Once you have found the claim you would like to enter the actuals for, click on the Claim number under the **Id** column.

5. Click on **Update** and then click on the **+** beside **Unit Expenses.**

⊟ Unit expenses $729.50

Add an expense

Expense	Comments	Date	Amount	
AIRFARE			$0.00	update | delete
BAGGAGEFEES			$0.00	update | delete
CONFERENCE FEE			$500.00	update | delete
GAS			$0.00	update | delete
LODGING			$0.00	update | delete
MEALS			$229.50	update
LUNCH MEAL			$0.00	update | delete
MILEAGE			$0.00	update | delete
PARKING			$0.00	update | delete
RENTAL CAR			$0.00	update | delete

⊞ Attach supporting documents

6. For any County paid items (example: Airfare, Conference Fee, Lodging, etc.), click **Delete** to remove these items.

⊟ Unit expenses $729.50

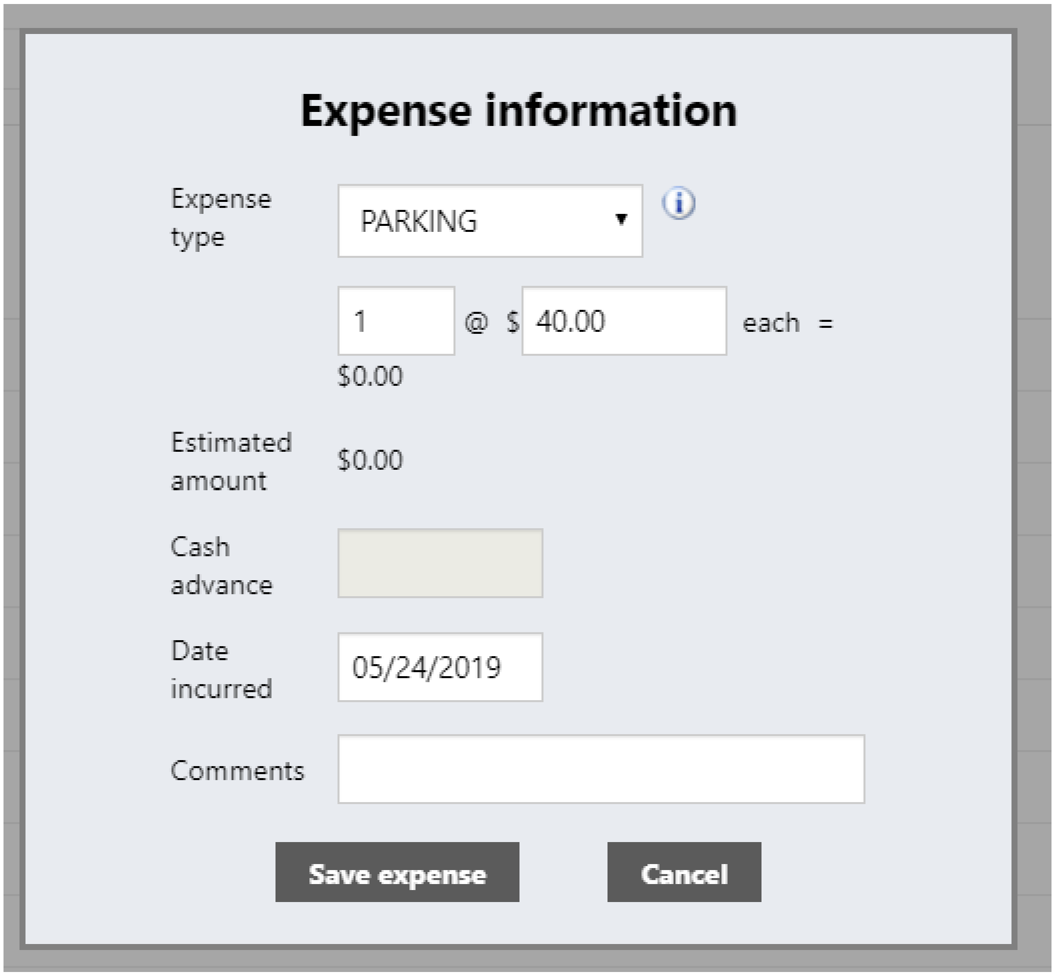
Add an expense

Expense	Comments	Date	Amount	
AIRFARE			$0.00	update | delete
BAGGAGEFEES			$0.00	update | delete
CONFERENCE FEE			$500.00	update | delete
GAS			$0.00	update | delete
LODGING			$0.00	update | delete
MEALS			$229.50	update
LUNCH MEAL			$0.00	update | delete
MILEAGE			$0.00	update | delete
PARKING			$0.00	update | delete
RENTAL CAR			$0.00	update | delete

⊞ Attach supporting documents

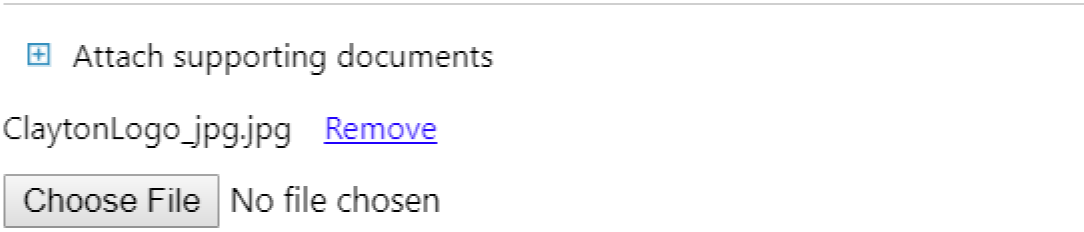
7. Enter any additional expenses occurred while traveling.

- **Parking:** Should be entered as one expense, with the amount being the total amount of parking tickets and/or Uber, Lyft, taxi, etc. Enter the **Date incurred.**



8. Click the **+** beside **Attach supporting documents.** Click **Choose File** to upload your required documents. Required documents upon returning include:

    - Hotel receipts
    - Baggage fee slips
    - Parking receipts
    - Uber/Lyft/Taxi receipts
    - Meal receipts **ARE NOT REQUIRED.**



9. Click **Review** and once all information has been verified click **Submit Claim. 10.**

Verify Expenses

Claim details

Comments	Spring GMIS 2019
Claim type	EMPLOYEE TRAVEL
Status	Entering
Department	INFORMATION TECHNOLOGY
Event	CONFERENCE
Start date	Sunday, April 28, 2019
End date	Thursday, May 2, 2019
Destination city	Athens
Destination state	GA
Destination country	UNITED STATES
Cash advance	$229.50
Amount claimed	$269.50

Per unit expenses

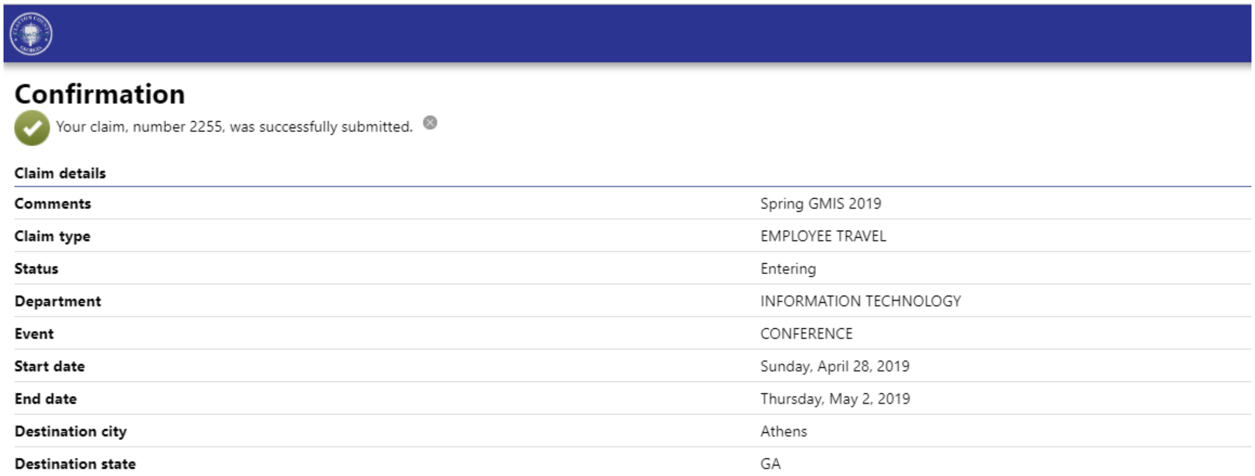
	Date	Comments	Cash advance	Amount claimed
MEALS	5/24/2019		229.50	229.50
PARKING	5/24/2019		0	40.00
			$229.50	**$269.50**

Attached documents

ClaytonLogo_jpg.jpg

Back Submit Claim

10. Once the claim is submitted, you will receive a confirmation message, with your claim number at the top. Be sure to give this claim number to your administrative personnel who handle the claims in your department.


Confirmation

Your claim, number 2255, was successfully submitted.

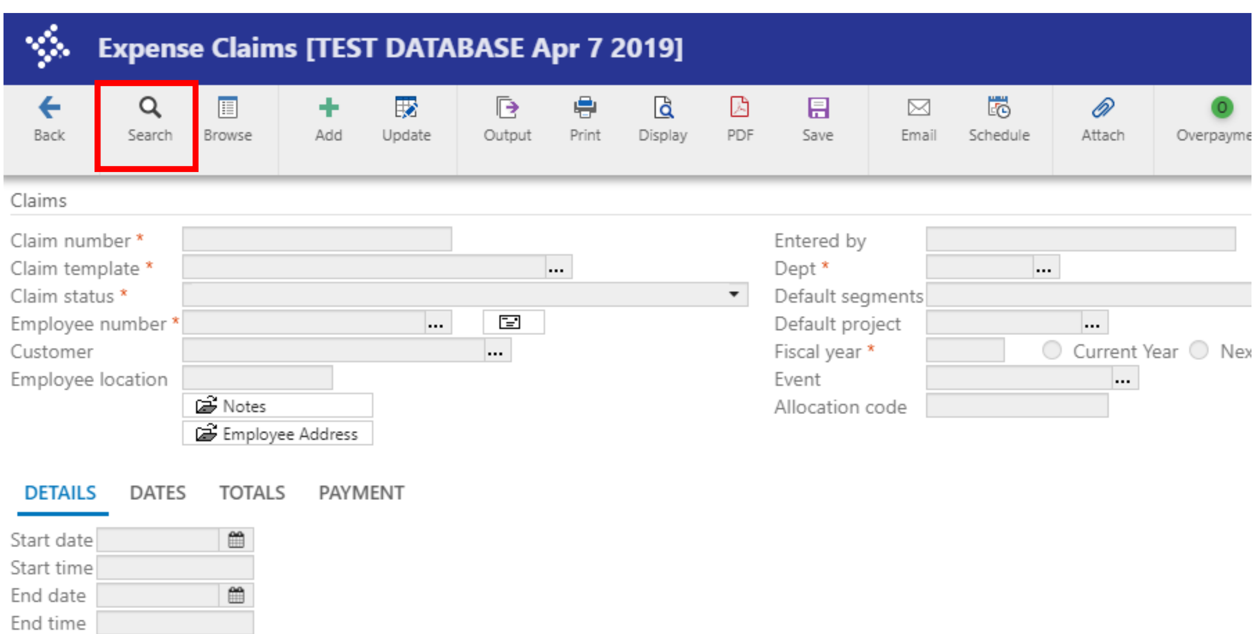
Claim details	
Comments	Spring GMIS 2019
Claim type	EMPLOYEE TRAVEL
Status	Entering
Department	INFORMATION TECHNOLOGY
Event	CONFERENCE
Start date	Sunday, April 28, 2019
End date	Thursday, May 2, 2019
Destination city	Athens
Destination state	GA

11. If you are the administrative personnel for your department, login to Munis, search for the employee's claim by entering the claim number, and skip to step 10 below.

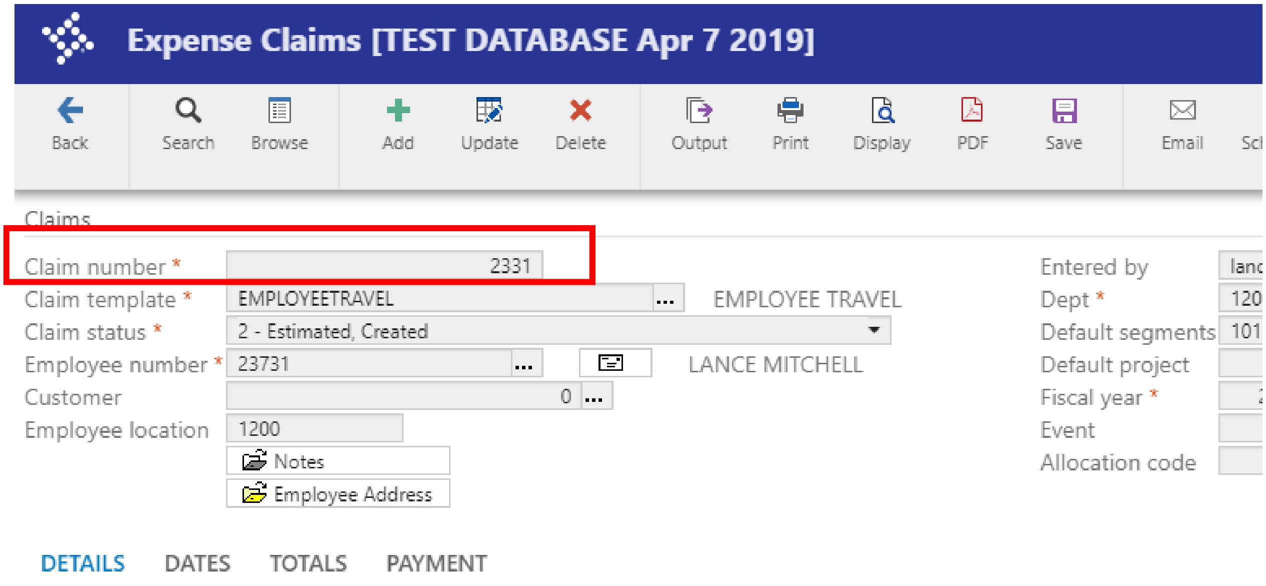
How to Enter Your Actual Travel Expenses in Munis

To enter actual expenses incurred, you will perform the following:

1. Click on **Financials > Employee Expense > Expense Claims.** Search for your claim number by clicking the **Search** button.

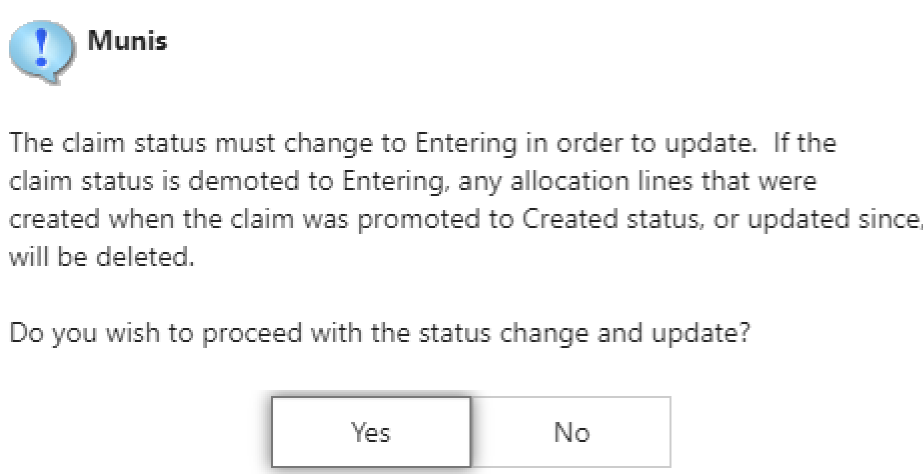


2. Enter your **Claim Number** then press Enter

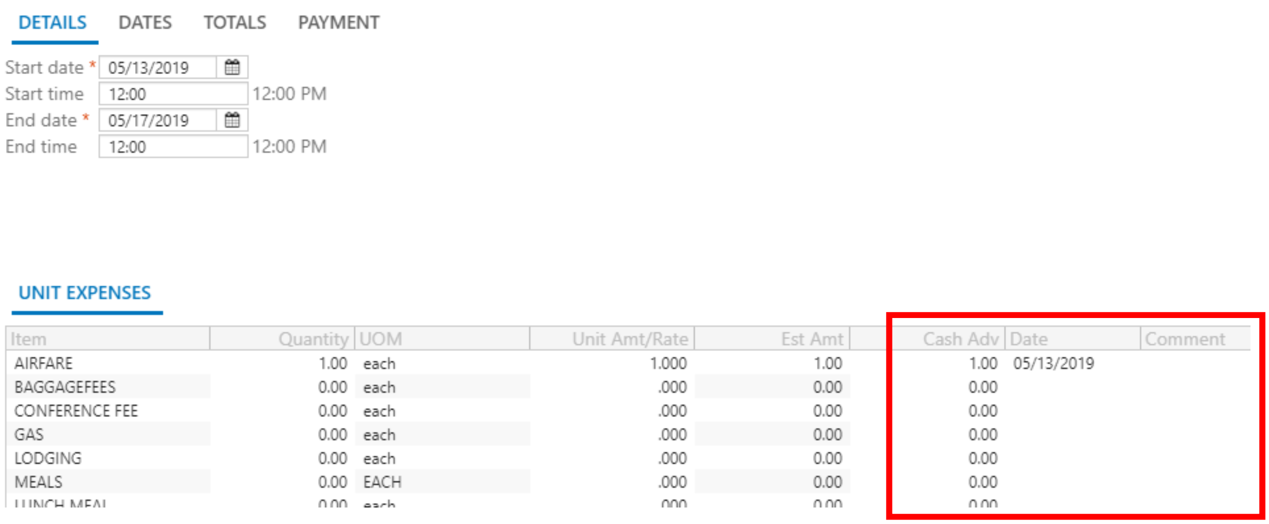


3. Select **Update** in the Ribbon at the top of your page.

4. A box will pop up letting you know that you are now entering into Actuals, Click **Yes**.

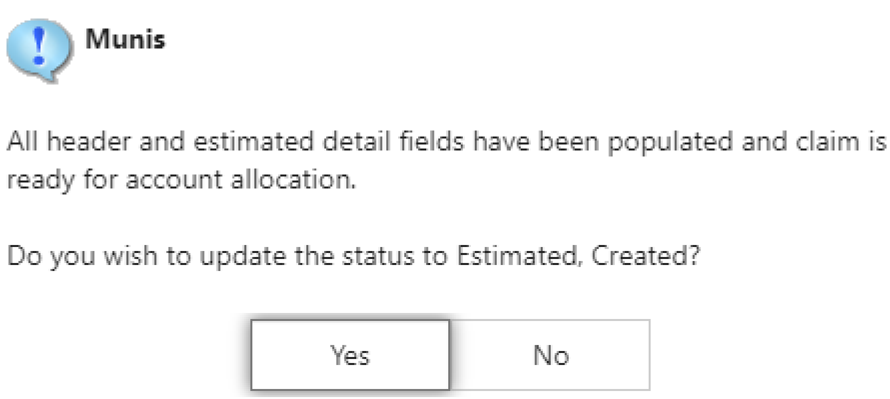


5. On the Unit Expense portion of the screen, enter your **Cash Advance, Dates** and any **Comments**. If you click on the calendar icon, you will see that the system defaults to today's date. You can override this if you don't think this transaction is going to be completed today.



6. Once Actuals are entered, click **Accept.**

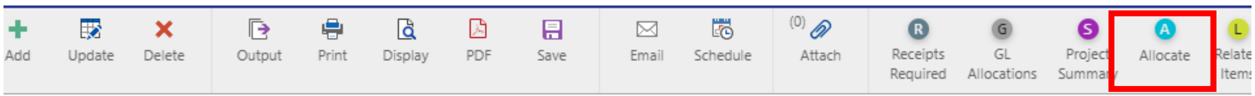
7. A confirmation window will display. Select **Yes**, to update the status.



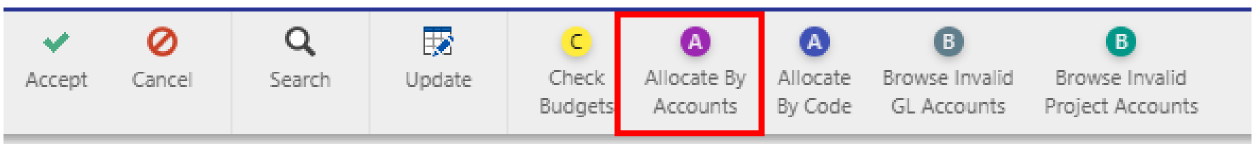
8. If you have receipts to attach, you will be using TCM. Detailed instructions are provided in the How to Attach a Document section of this user manual.

9. Once your attached the receipts and closed the TCM, you'll be returned to the screen where you can allocate the expense.

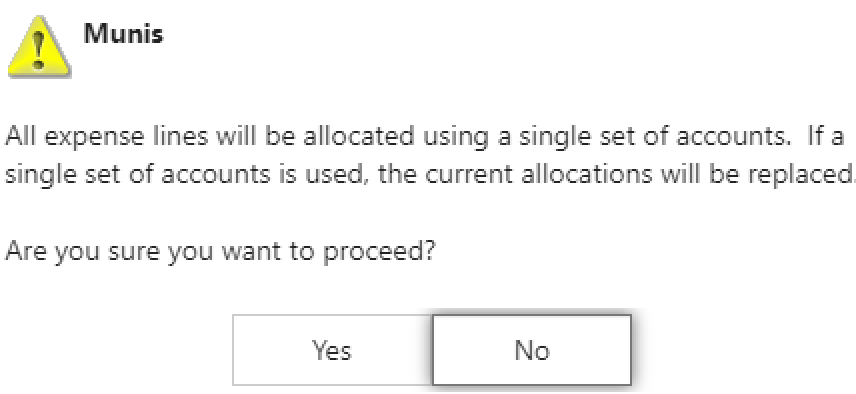
10. Click **Allocate.**



11. Click **Allocate by Account.**



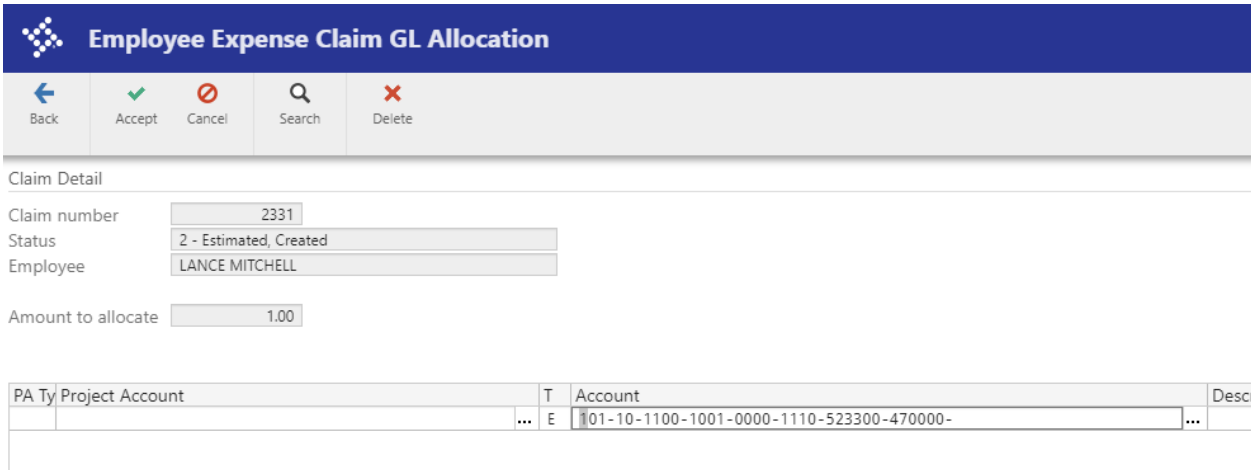
12. A window will display confirming that you want to proceed. Click **Yes**.



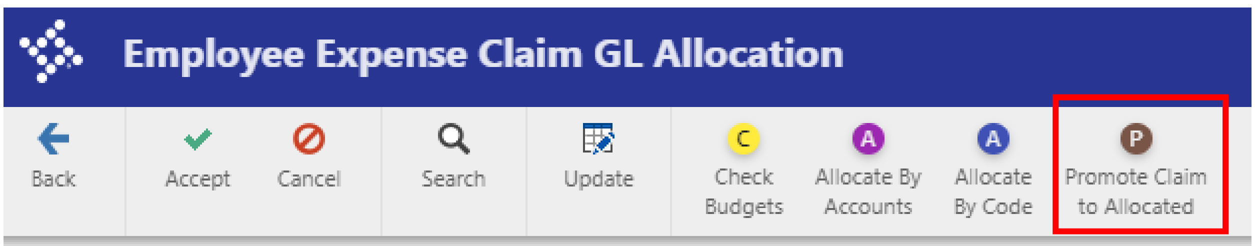
13. Use the Field Help  menu to either select the **Project Account** or **Account.** You will only use Project Account is your Expense Claim is related to a project.

    a. If you are entering a project account, ensure that the PA Type is set to E for Expense. Once the project account is entered, the General Ledger account will default.

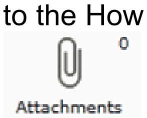
    b. If you are not entering a project account, you will only need to complete the General Ledger account information. Ensure that the T (Type) field is set to E for Expense.



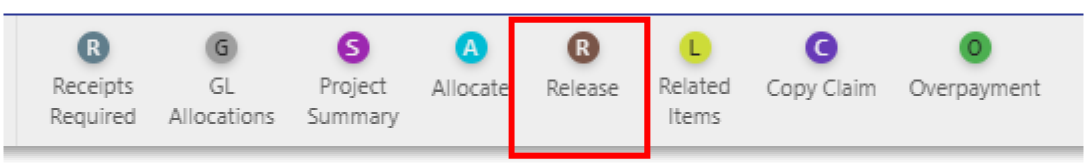
14. Click **Promote Claim to be Allocated**



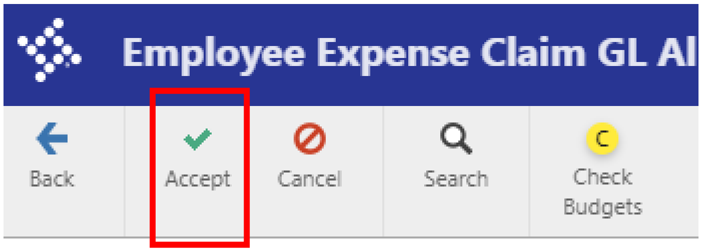
15. Click on the **Attach** button to attach your Excel claim form to your Munis expense claim. Refer to the How to Attach a Document section for more information on how to attach a document.



16. Click **Release.**



17. Click **Accept**.



18. You will be prompted to update the status of the claim to 2 – "Actuals, Created". Click **Yes**.

Note: The claim will move into the 2 – "Actuals, Created" status which will notify Departmental Admin that the claim is ready for review. You can no longer make any updates to the claim at this time.

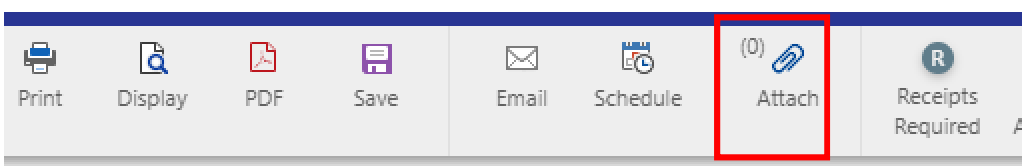
How to Attach a Document

Various modules throughout Munis allow you to attach supporting documents to individual transactions, as indicated by the Attach button in the ribbon.

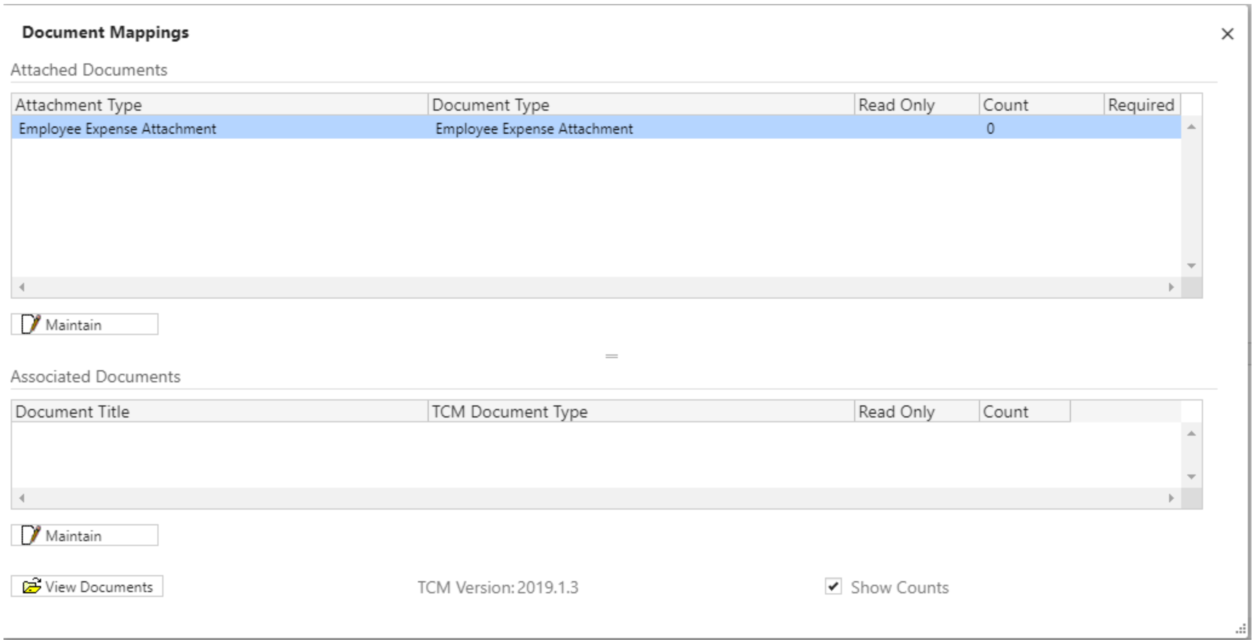
To attach a document, your document must be accessible on your computer, or you must have a scanner attached to your computer.

How to Attach a Document that is Saved to Your Computer

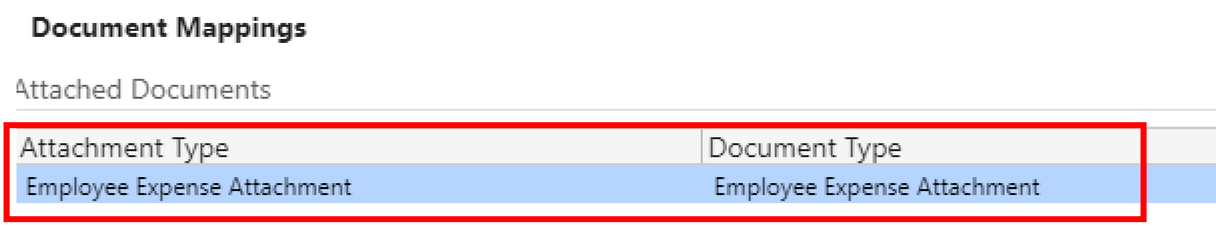
1. From the active record in Munis, click the Attach button to launch TCM.



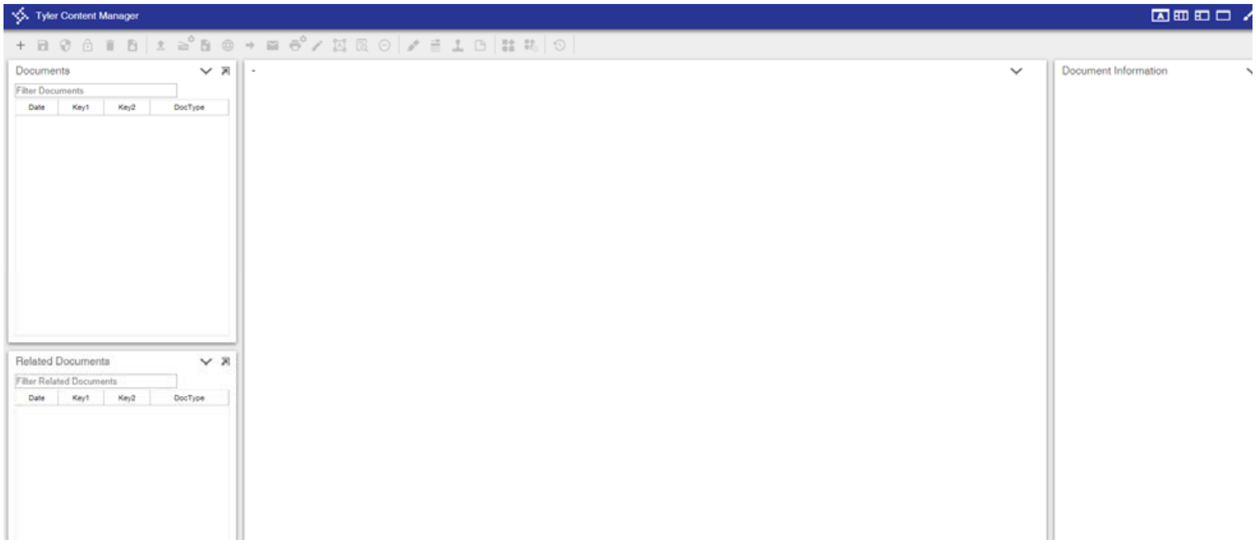
2. The system will bring you to the Document Mappings screen.

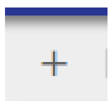


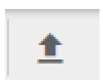
3. Click on the Employee Expense Attachment row.



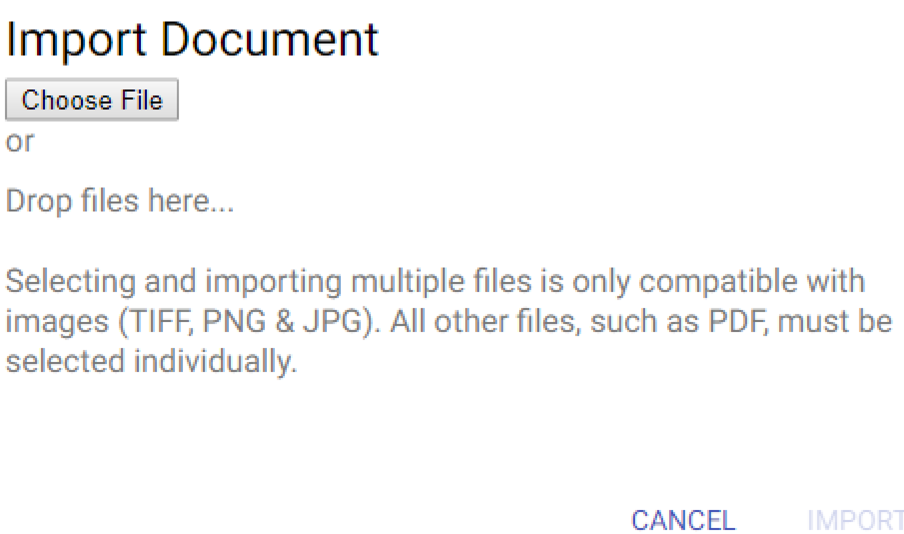
4. You will be brought to the Tyler Content Manager.



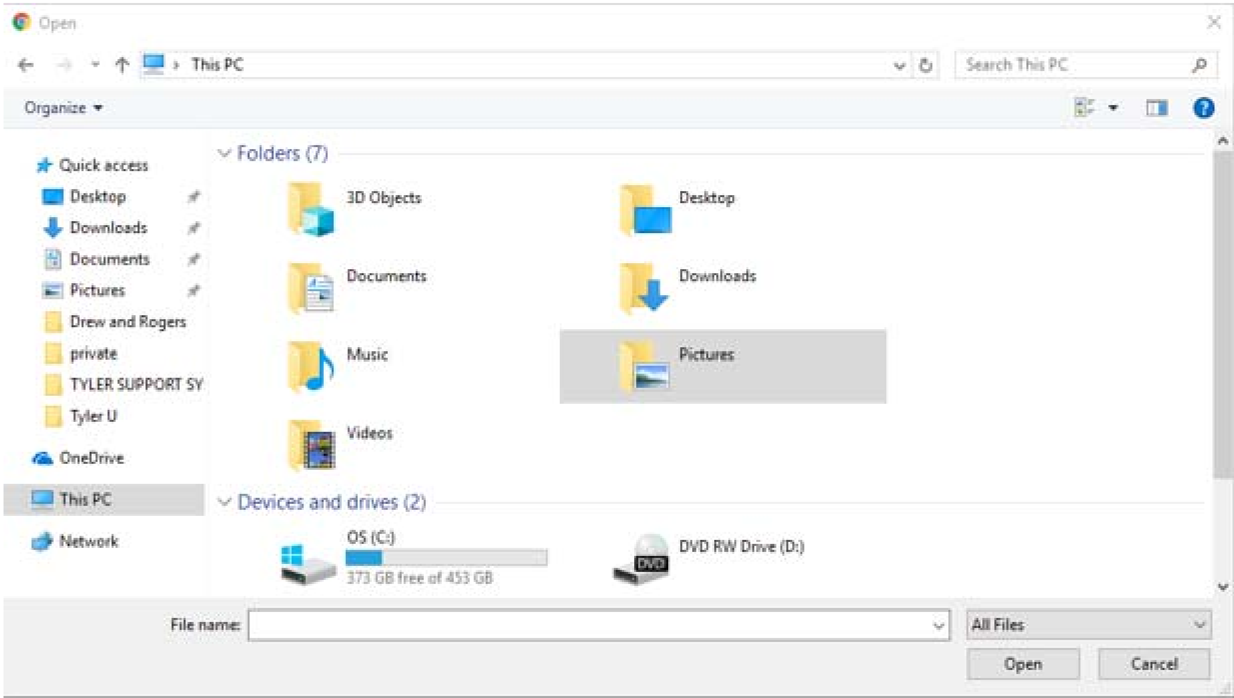
5. Click the **Plus** button.  to attach a new document to your expense claim.

6. Click on the **Import** button.  to find the file to attach to your expense claim.

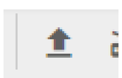
7. A pop-up window will display. Click on **Choose File**



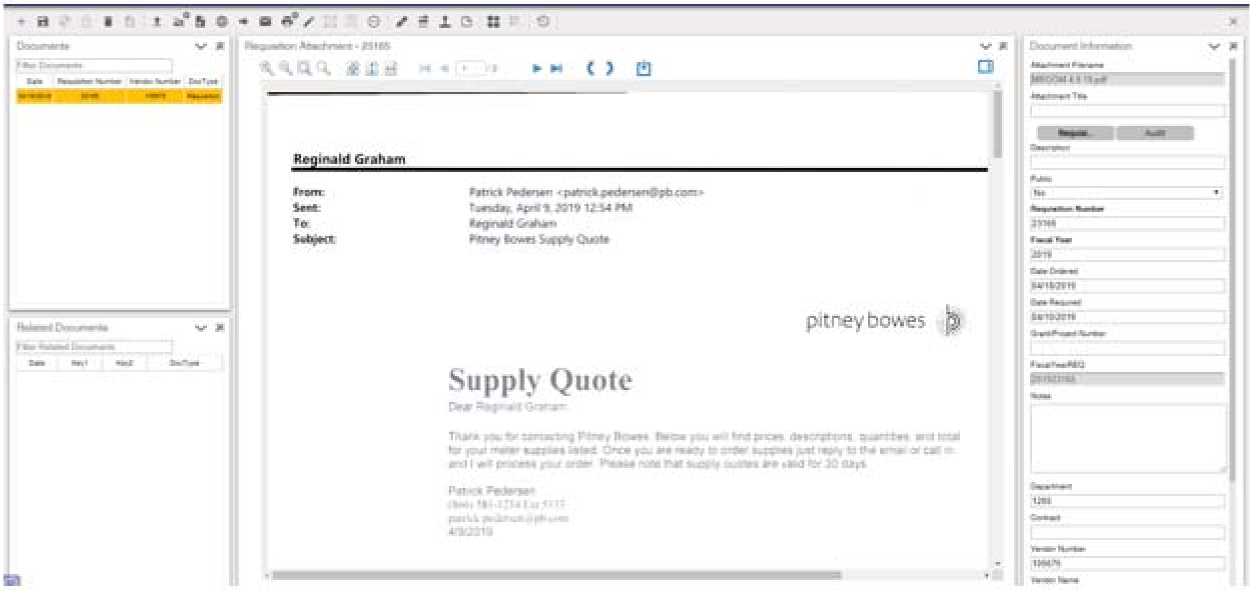
8. A file explorer window will display. Find the file that you would like to attach and select it.



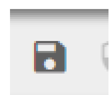
9. Once you have selected the file that you would like to attach, click on the **Import** button.



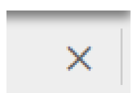
10. Your attachment will display in the center of the window. Complete the required information under the Document Information section on the right panel to describe your document.



11. Click on the **Save** button to save the document attachment.

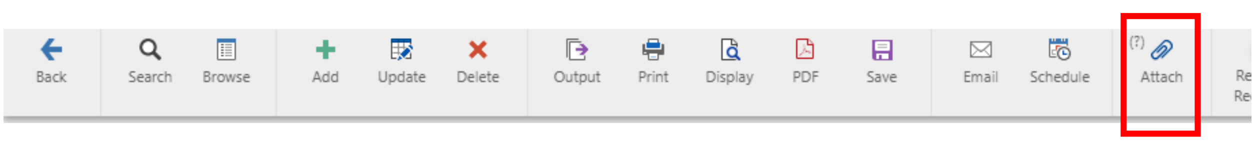


12. Click the **Close** button.

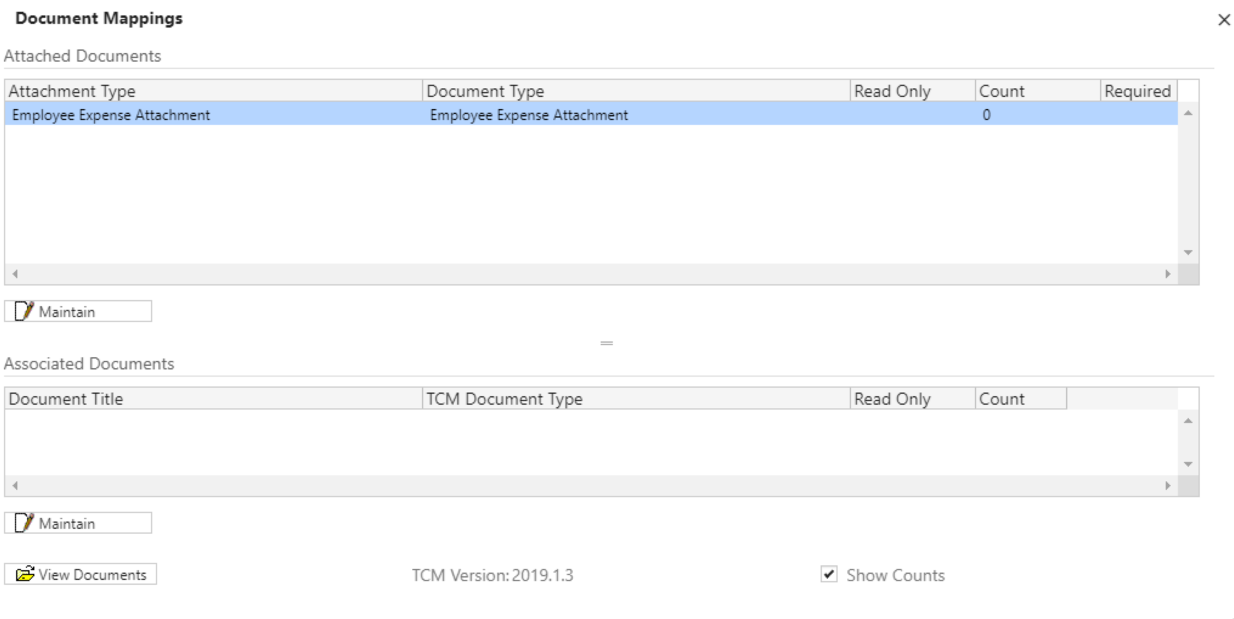


How to Attach a Document by Direct Scan

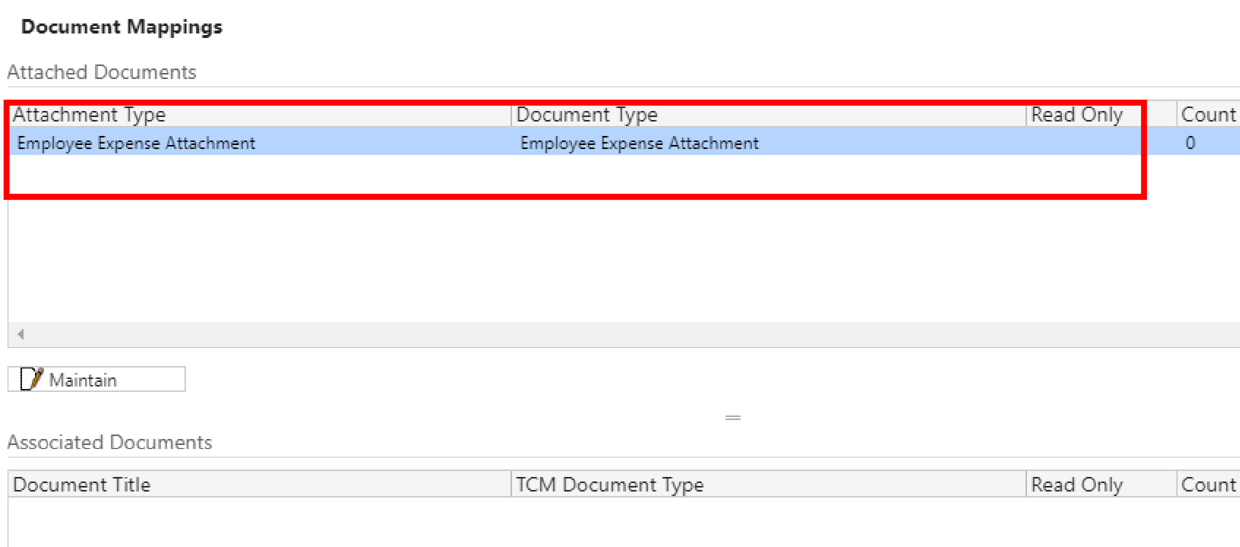
1. From the active record in Munis, click the **Attach** button to launch TCM.



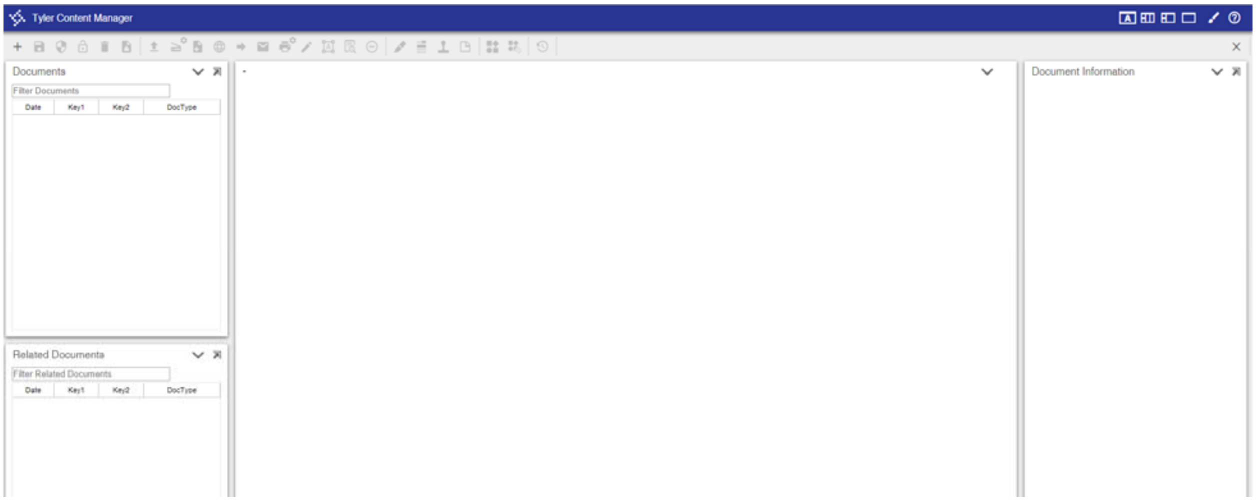
13. The system will bring you to the Document Mappings screen.

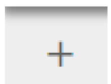


14. Doublle Click on the Employee Expense Attachment row

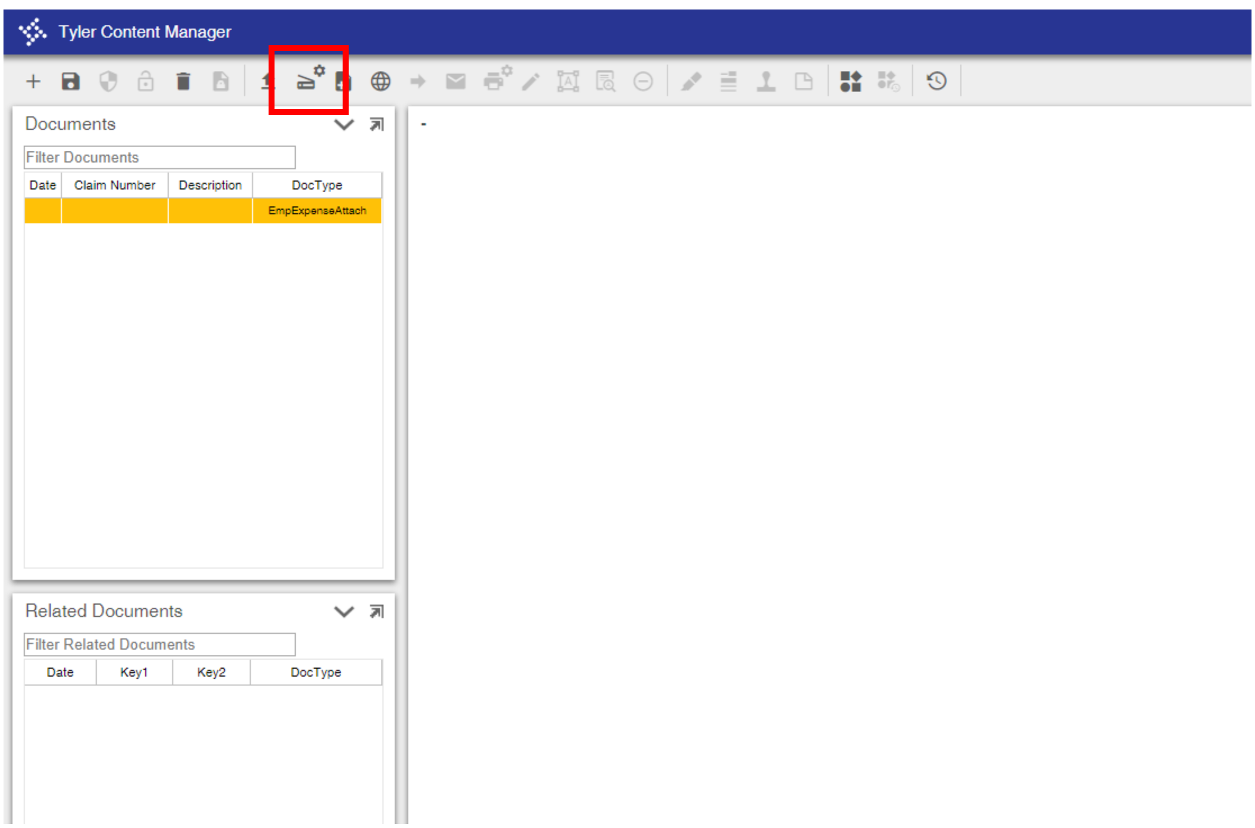


15. You will be brought to the Tyler Content Manager.

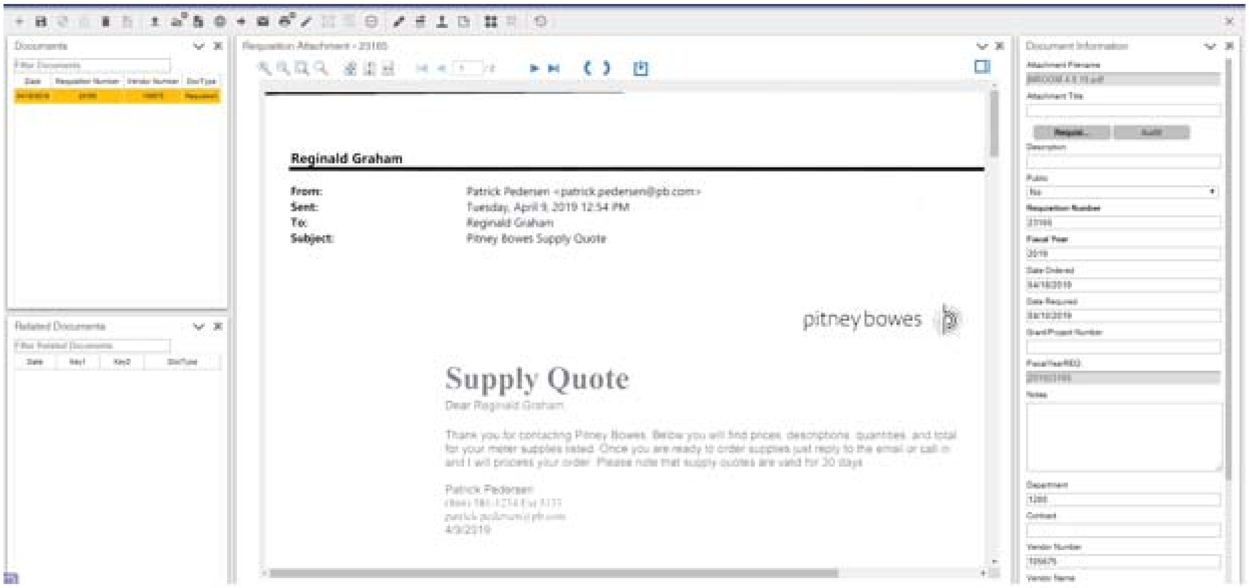


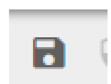
16. Click the **Plus** button.  to attach a new document to your expense claim.

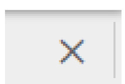
17. The following screen will display. Be sure you are attached to the scanner and click the **Scan** button to direct scan the attachment into TCM.



18. Your attachment will display in the center of the window. Complete the required information under the Document Information section on the right panel to describe your document.



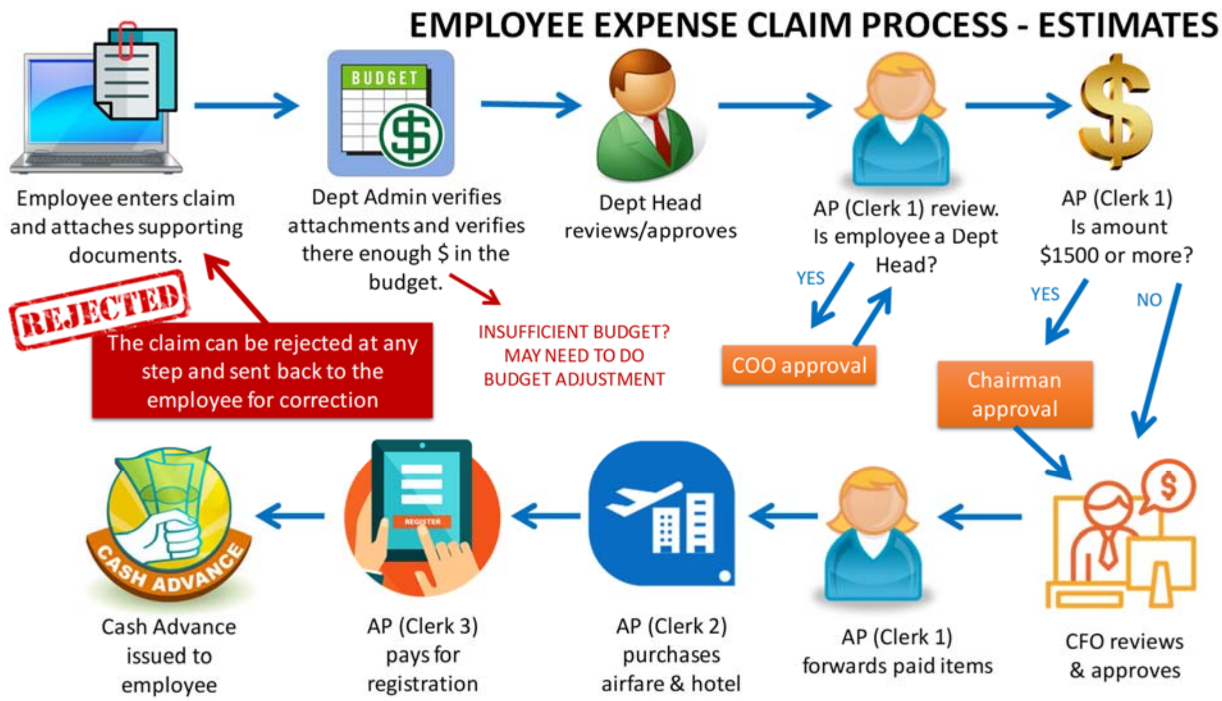
19. Click on the **Save** button to save the document attachment. 

20. Click the **Close** button. 

Expense Claim Approvals

What Approvals are Required on an Estimate Travel Claim?

Once you Release your requisition request, it will enter an automated workflow which will forward it to the appropriate parties for approval. When approvals are pending, required approvers will receive a notification through an e-mail, Tyler Dashboard, or both, indicating that there are records awaiting approval. Each approver will review the transaction for validity and ensure that all supporting documentation has been attached through Tyler Content Manager. The approver can then choose to approve, reject, hold, or forward a transaction to another user for additional review.



After departmental approval, the Claim will be forwarded to AP Clerk 1 who will verify who is traveling.

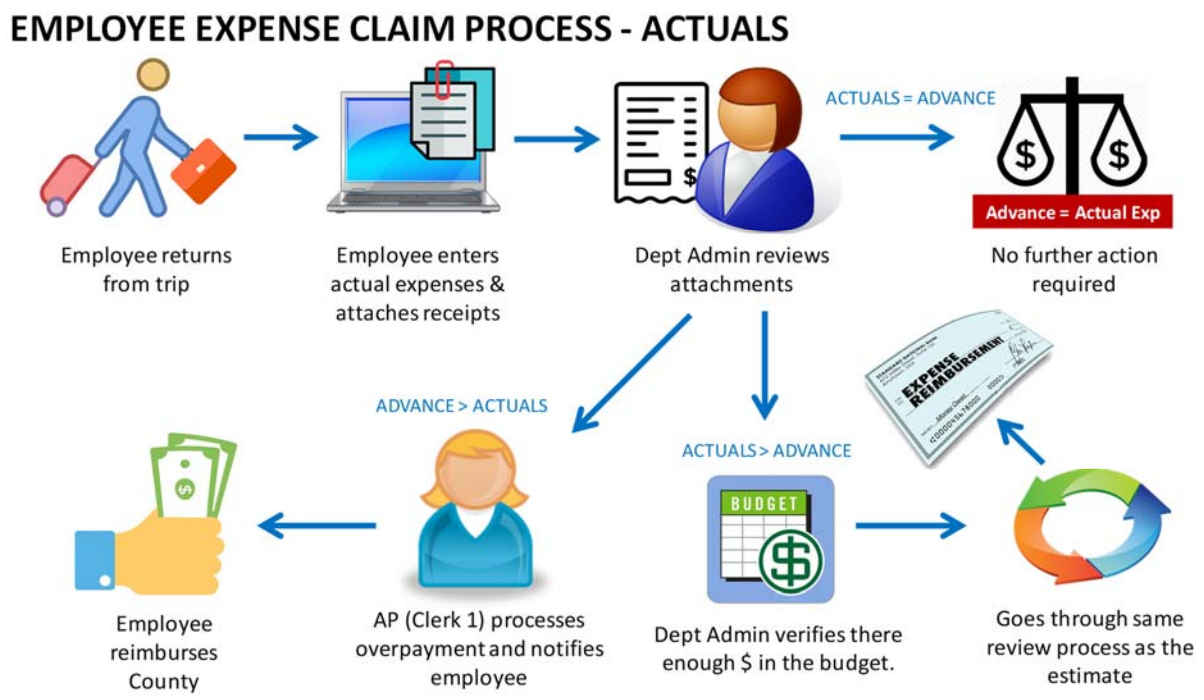
There are two possibilities:

1. If the traveler is a Department Head, then the transaction must go to the COO for approval. Once the COO approves, then it comes back to AP.
2. If the traveler is not a Department Head, then AP determines if the amount of the request is $1500 or greater. If it is less than $1500, the transaction is forwarded directly to the CFO. If $1500 or greater, the claim must go to the Chairman for approval. Once approved by the Chairman, it is also forwarded to the CFO.

The CFO approves and then the claim goes back to AP Clerk 1, who will then send the request to AP Clerk 2 to purchase the airfare, transfer the hotel reservation from the traveler's credit card to the County's credit card. AP Clerk 1 will forward the documents to AP Clerk 3 to pay for the conference registration.

When AP Clerk 2 is done with their process, AP Clerk 3 will initiate a check to the traveler for the amount of the requested cash advance.

What Approvals are Required on an Actual Expense Travel Claim?



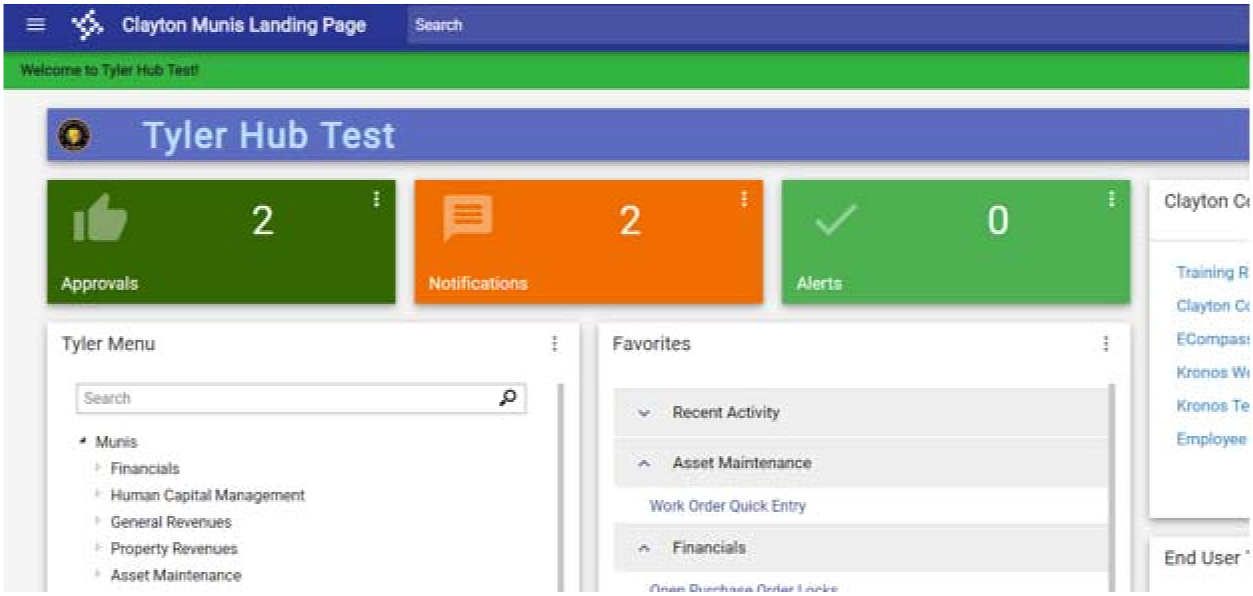
How do I Approve a Claim?

If you are a Department Admin, Department Head, Accounts Payable, COO, Chairman or CFO, then you will be required to approve travel claim requests.

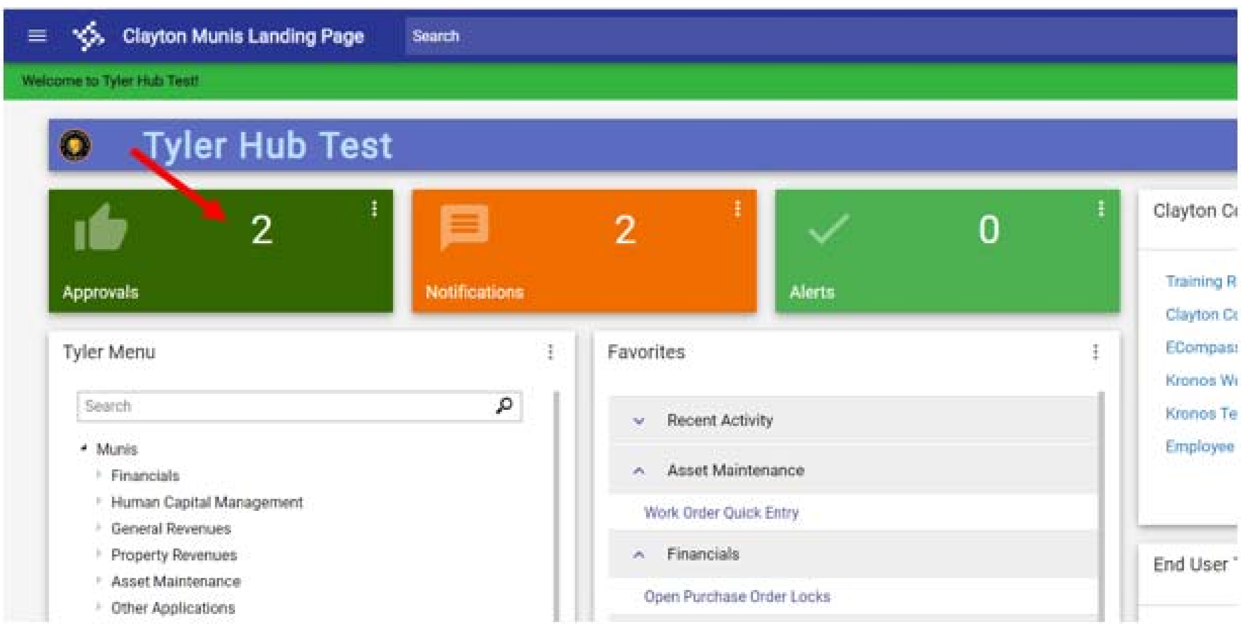
Department Admin - you will need to review travel claims, and check for available budget.

1. Go to your **Clayton Munis landing Page** screen.

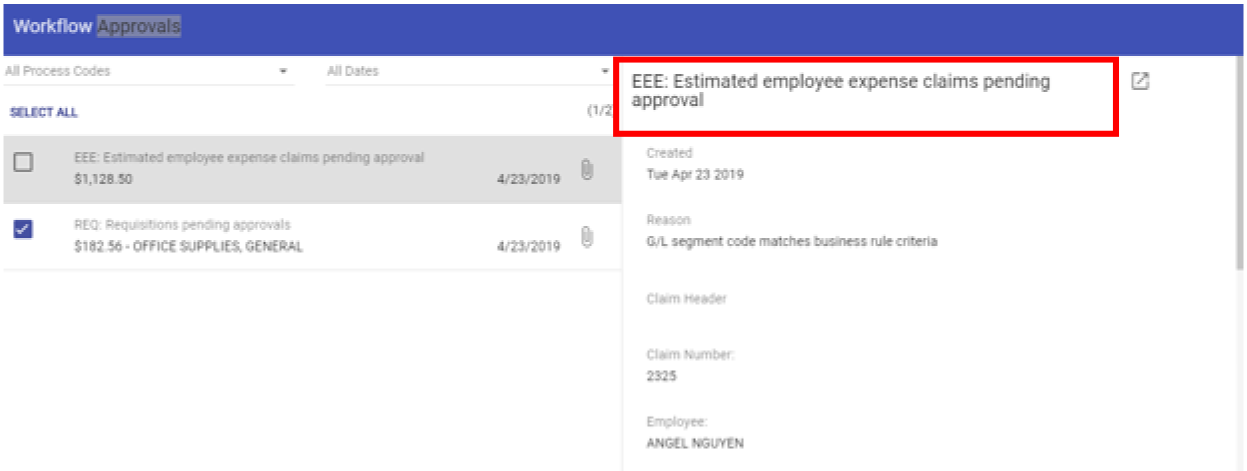
2. Your Tyler Hub will display.



3. Click on the **Approvals tile** to view your pending approvals.



4. A window will display that lists the requests pending your approval in the left panel. You can choose to view them by date or by process code (which defines the type of document). When you click on a **EEE – Estimated Employee Expense Claims** item in the left panel, details regarding the claim will be displayed in the right panel.

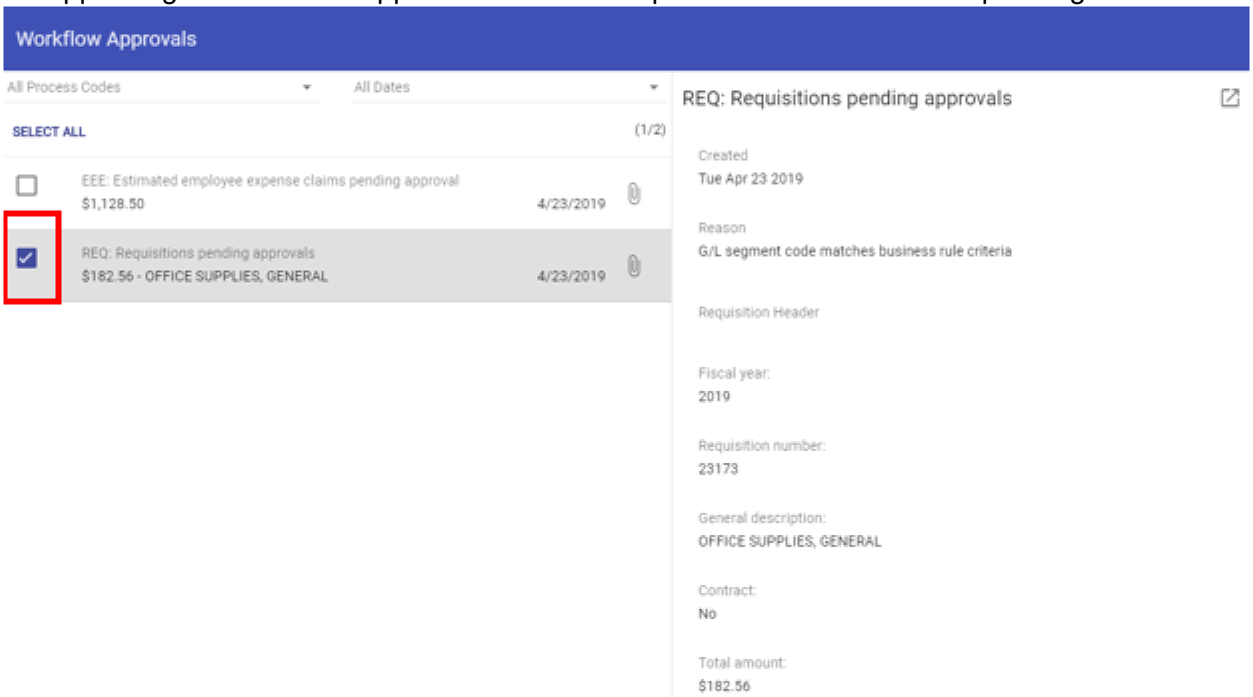


5. To view additional details, click the blue hyperlink [EEE-Estimated employee expense claims pending approval.]

6. A separate window will open displaying the expense claim.

7. Review the requested requisition line items. Click on the **Attachments** icon to verify that the supporting documents have been attached.

8. To approve go back to the Approvals screen and place check mark on the pending action w



aiting for approval.

9. A series of buttons will display at the bottom of the window. Select if you would like to Approve, Reject, Forward or Hold the claim and then click OK.

   a) **Approve** – Approves the transaction and moves the claim on to the next approver. If you are the last approver, then the claim will be updated a status of Approved.

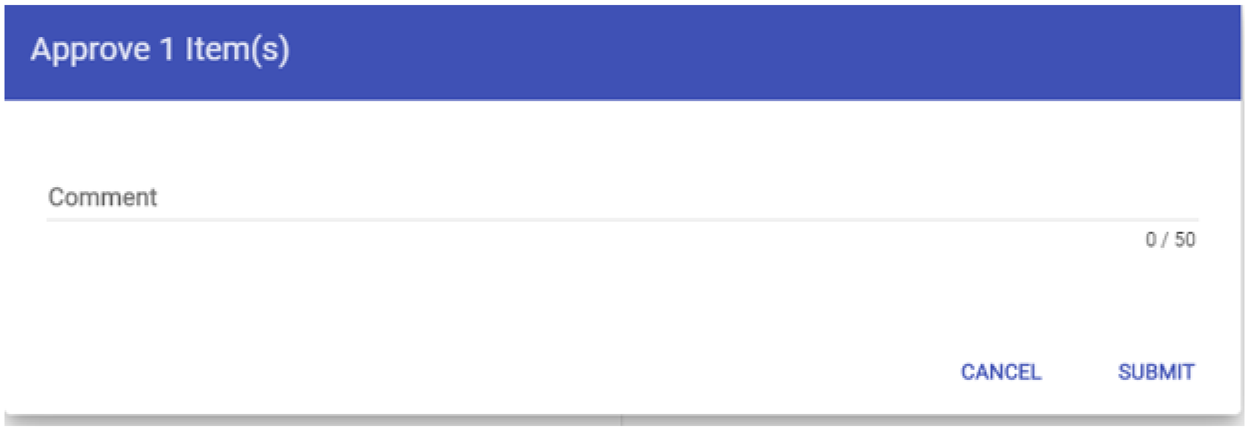
   b) **Reject** – Rejects the transaction and requires that you enter a note for the requestor. The note must indicate the reason for rejection and can assist the originator in determining the next course of action; an alteration and resubmission, or a deletion from the system.

   c) **Forward** – Forwards the claim to another Munis user for review. You must enter the Munis username for the person that you are forwarding the claim to.

   d) **Hold** – Keeps the transaction record in your approval queue for additional review. The claim will remain in the Hold status until further action is taken. This option requires that you enter a note to be sent to the originator. The note must indicate the reason for rejection and can assist the originator in determining the next course of action; an alteration and resubmission, or a deletion from the system.

10. Click **Approve.** 

to approve the claim**.** Comments may be entered if desired.



11. Click 

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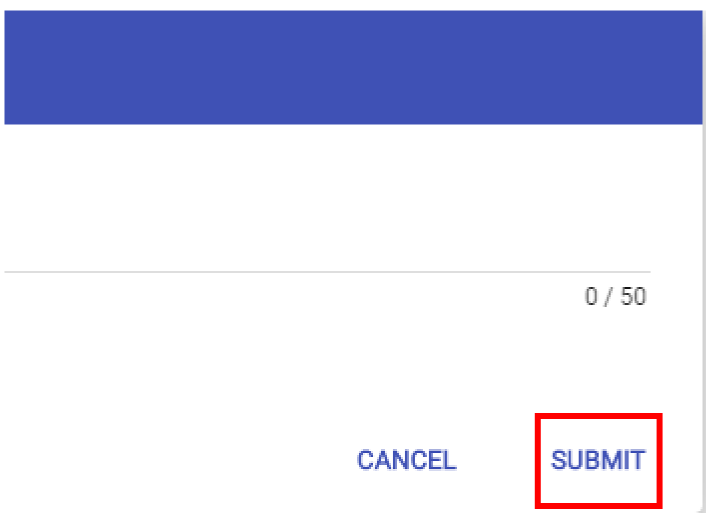
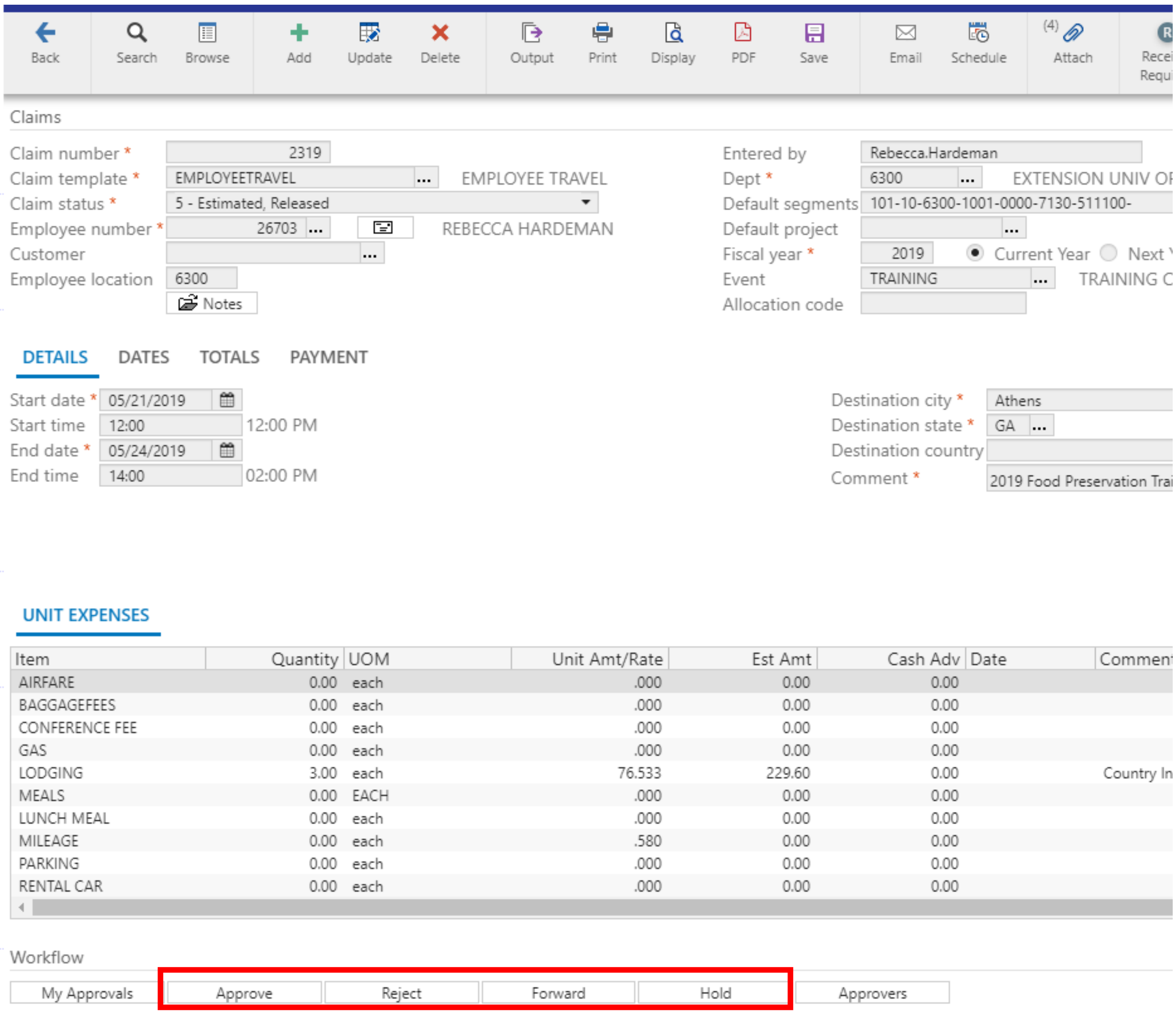


12. The claim can also alternatively be approved directly from the expense claim screen (**Financials > Employee Expense > Expense Claims**) or from the expense approvals screen. (**Munis > Financials > Employee Expense > Expense Approvals).**



Note: If your Claim is REJECTED, you will receive a notification via email. You can then go back into your existing claim and update or change the information so it can be submitted for approval.