The following document provides information about the below FAQ topics:

- Navigation
- Locations
- Quick Fill
- Expense Line Details
- Summary and Submit
- Notes
- Apply Cash Advance
- Withdraw
- Push Notifications
- Expense Report Routing
- Auto Approve
- Editing Expense Claims

- Navigation
  - There are now two ways to access Travel and Expense menu items:
    1. Travel and Expense Centre
    
    ![Travel and Expense Centre](image1)
    
    2. Breadcrumb Navigation
    
    ![Breadcrumb Navigation](image2)
Locations

- You will now see only three (3) locations:
  1. Canada – Expenses purchased/consumed in Canada
  2. United States – Expenses purchased/consumed in the USA
  3. Other – Expenses purchased/consumed outside of Canada or the USA

Quick Fill

- To quickly create many expense lines for your claim, use the Quick Fill link to select as many expense types as you need in one easy step:
Expense Line Details

- Expense details are now completed on the main page of the expense report.
- Lines can be expanded or collapsed in an accordion style to show or hide details:

Summary and Submit

- When expense line details are completed, you will navigate to the Summary and Submit page which allows you to review the total reimbursement amount as well as add any overall information about the purpose of the claim (see Notes).
Notes

- You can now add notes to expense claims and advances, which provide more space to explain the purpose of the claim, as well as track any conversations, follow up, or clarifications noted along the review and approval of the claim.

- When creating an expense claim, Notes are found on the Summary and Submit page:
Apply Cash Advance

- Claimants will be notified prior to submitting the claim if they have an outstanding cash advance:

  ![Warning](Warning.png)

  ![Amount Due to Employee](Amount.png)

- Reviewers and Approvers are able to apply missed cash advances without sending the report back for revision:

Withdraw

- If you’ve submitted an expense claim and notice an error, you can now withdraw the claim without having to contact someone to have the report sent back for revision.
- This feature is available as long as the claim has not been reviewed or approved.
Expense Report Routing

- You can now see the path your claim will take through a visual image upon submission or by viewing your claim.
- Actions that have been taken are marked with a ✓
- Actions that have not been taken appear in gray.
Push Notifications

- You will still receive an email when an expense claim has been routed for your approval, but you will also see a notification pop up in Western Financials where you can simply click on the link to take you directly to the claim.
Auto Approve

- If you are queued the Reviewer/Approver more than once in an approval chain, you will only need to review/approve one time and any subsequent steps routed to you will be auto-approved.
- Here the Department Approver was also the employee’s HR Supervisor:
![Image](https://via.placeholder.com/150)

**Editing Expense Claims**

- Reviewers may make changes to expense claims, but Approvers should send the expense claim back for revision if changes are required:

  Reviewers are able to modify details, add lines, edit accounting, etc.:

  ![Expense Claim Editor](https://via.placeholder.com/150)

  **Approvers may only view expense details, lines, accounting, etc.:**

  ![Expense Claim Viewer](https://via.placeholder.com/150)

  Reviewers should **never** change the Fund on the accounting of a claim.

  ![Expense Claim Fund Change](https://via.placeholder.com/150)