

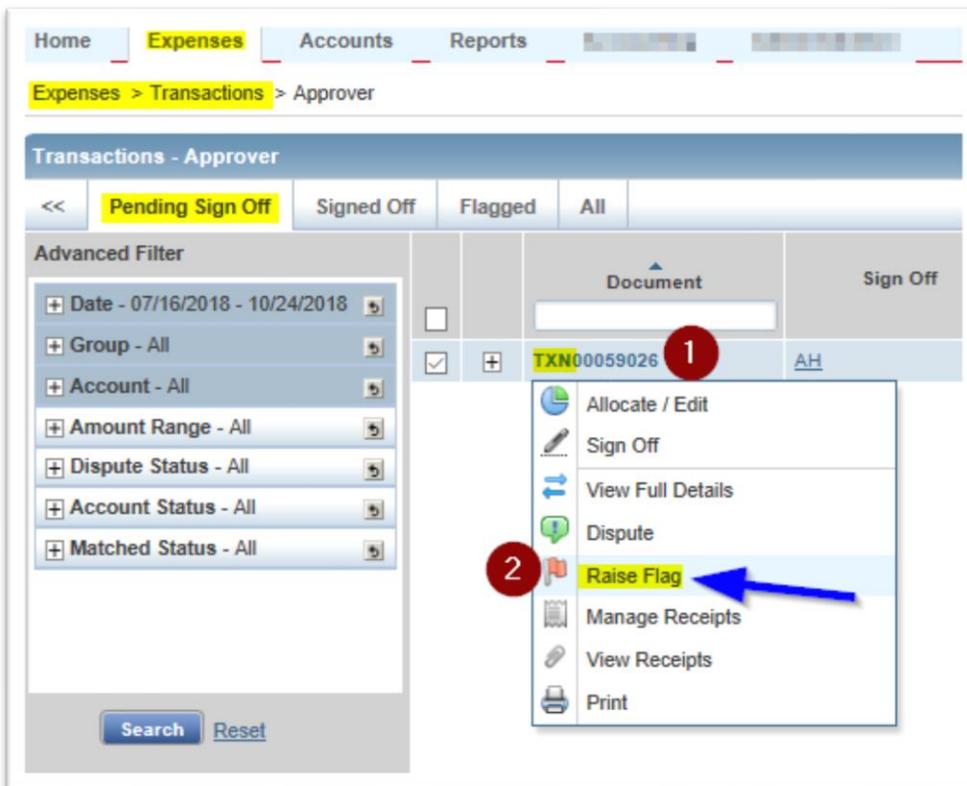
How to Flag / Remove a Flag from a Transaction or Request

“Flagging” a Transaction or Request is the term used to indicate that a transaction or request is either missing something or needs further information before it can be approved or processed. An Approver or AFS Finance may Flag an item when they find that a wrong code has been used, they can’t read the receipt that was uploaded, or they just need further information to back up the request. When an item is Flagged, it then becomes available to the user or cardholder to then edit. The act of Flagging an item will send the user/cardholder an email notifying them it was flagged and the act of removing the flag will send an email back to the approver or Finance to let them know it was done.

If the issue is that the user just used the wrong code and the correct code is obvious to you, you may choose to just correct the code yourself. However, if something else is needed from the user in order to continue with the approval, you should flag it.

To Flag an item: (Approvers/Finance)

1. From the “Pending Sign Off” tab where you are reviewing all the items needing your approval, click on the Document TXN# or RCPT# to open the dropdown box of choices.
2. Then click on “Raise Flag”
3. Enter the reason you are flagging it in the comments box and click OK.



To Remove a Flag: (User/Cardholder)

1. From the “Flagged” tab under Expenses > Transactions > [Accountholder] OR Expenses > Reimbursements > [Accountholder]
2. After making the correction to the item, click on the Document TXN# or RCPT# to open the dropdown box of choices.
3. Then click on “Remove Flag”.
4. Enter some comments of what was done/corrected into the comments box and click OK.

The screenshot displays a web application interface for managing reimbursements. The top navigation bar includes tabs for Home, Expenses, Accounts, Reports, Accounting, and Administration. The current path is Expenses > Reimbursements > Accountant. The main section is titled 'Reimbursements - Accountant' and features a tabbed interface with 'Flagged' selected. An 'Advanced Filter' sidebar on the left lists various filters such as Date, Group, Purchase Request, Allocation Complete, Allocation Valid, Allocation Authorized, AH Sign Off, and APR Sign Off. The main table shows a list of transactions with columns for Document and Sign Off. The third row, RCPT00009501, is selected and has a dropdown menu open. The 'Remove Flag' option in this menu is highlighted in yellow, and a blue arrow points to it.

	Document	Sign Off
<input type="checkbox"/>		
<input type="checkbox"/>	RCPT00009394	AH APR ACT
<input type="checkbox"/>	RCPT00009462	AH APR
<input checked="" type="checkbox"/>	RCPT00009501	AH

- View Full Details
- Remove Flag**
- Manage Receipts
- View Receipts
- Print