Aston Staff Portal

Submitting Expense Claims on Behalf of Colleagues

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CORE Expenses now enables you to complete expense claims for other people in your Department. This process is designed to allow administrative staff to complete the bulk of the process for senior colleagues, thereby reducing the time spent by senior staff on routine administrative tasks.

If you require this option, please email HRSystems@aston.ac.uk to request that you are set up with the required system permissions.

The Proxy Expenses Process

The process begins with the proxy user completing the expense header and claim details, and attaching receipts where required. When the claim is submitted, it does not go straight to the approver, but to the expense claimant, and appears in their expenses tab as a new claim. The claimant is notified by email that their expense claim has been completed and is ready for them to submit for approval. The claimant must then submit the claim to the approver in the normal way, certifying that they have reviewed the claim and it is correct.

Submitting Expense Claims on Behalf of Colleagues

1. On entering the Staff Portal, firstly change your dashboard to the Admin dashboard -
   - Either – click the CoreHR icon and select Administrator Dashboard,
   - Or use the quick jump bar - type adm and press enter (type emp or man to access the employee or manager dashboards)
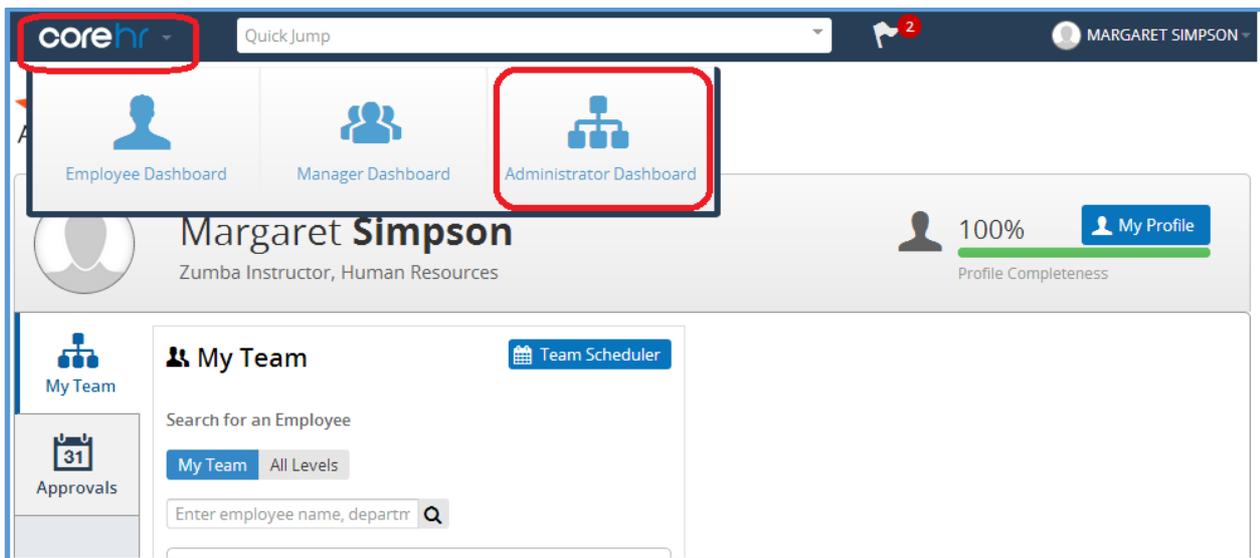

2. In the Admin dashboard, click on Manage Expenses
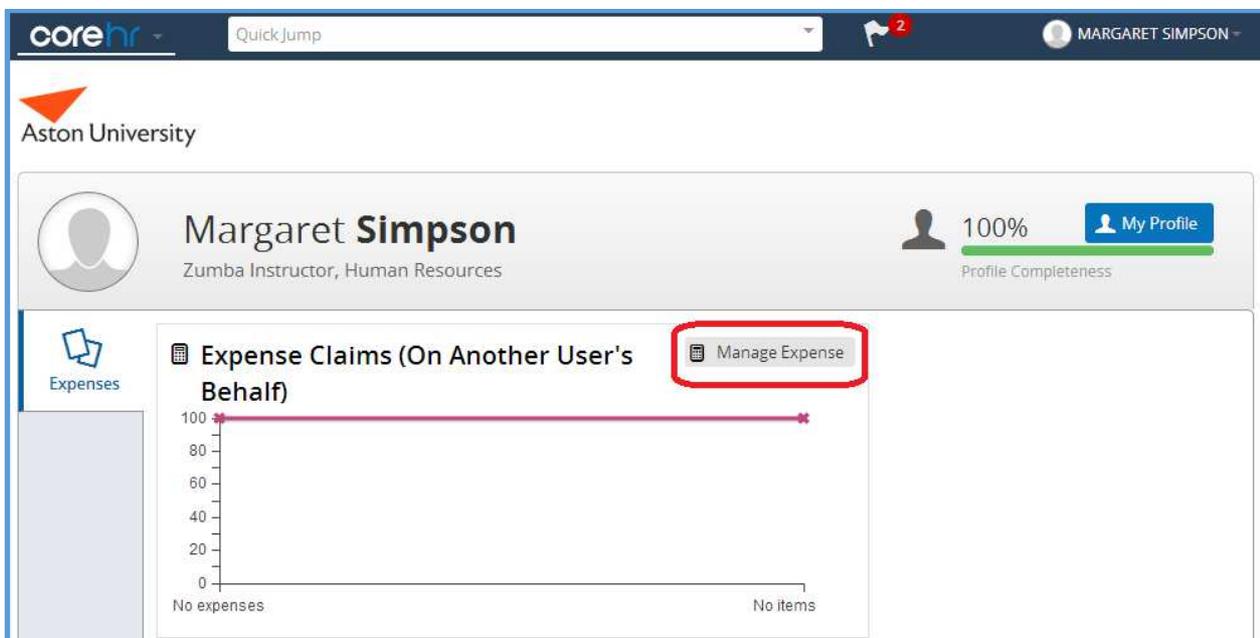
It is anticipated that proxy users will be managing a large number of claims from this screen, so it is equipped with a search bar to search for claims.

Once the proxy user has sent the claim to the claimant, and the claimant has been notified as such, it is then the claimant's responsibility to submit the claim for approval, so the proxy user need take no further interest in the claim, and can concentrate only on the claims they are working on. Accordingly, this screen has a default setting of "display only items where the claimant has not been notified", which filters out any claims that have already been sent. (This setting can be changed by unticking the tick box.)

3. Once in the Manage Expenses screen, you can click on New Claim to begin entering a new expense claim.
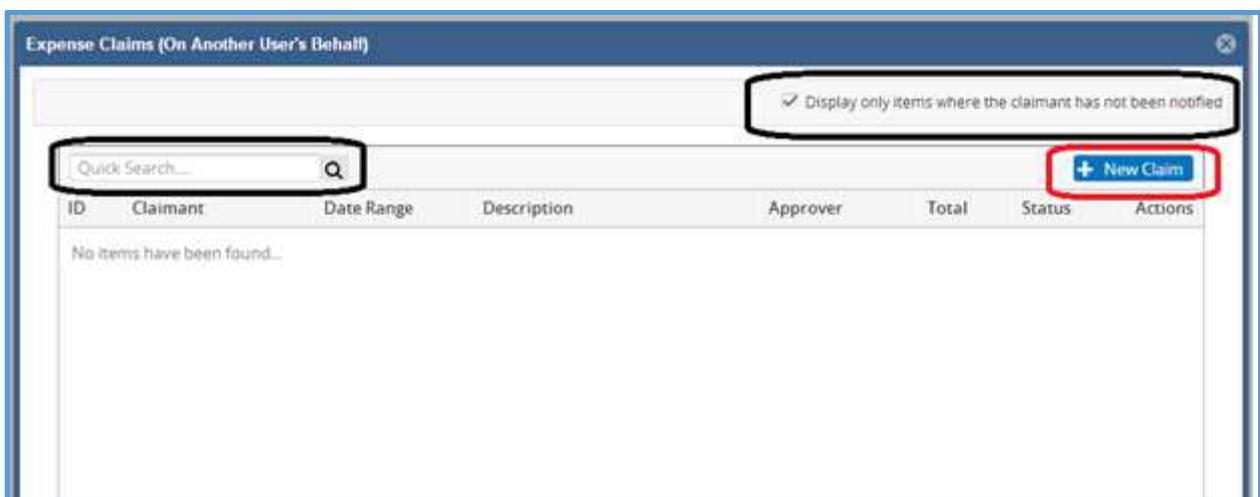
The proxy expenses new claim screen differs from the usual claim screen in only two ways – there is a drop down box at the top from which you select the claimant that you are entering the claim on behalf of, and the "Submit for approval" button is replaced by the "Notify Claimant" button.

The claimant list is restricted to only those staff in the department for which you are the proxy user – typing in the box will restrict the list further.

4. Once the claim details are completed, you can notify the claimant directly from the claim screen, or you can save the claim and send it on later.
5. Saved claims appear in the Manage Expenses screen – from here you have the option to view, update or delete the claim, or select the "Notify" option to send the claim to the claimant.

Remember – once you have notified the claimant, the expense claim will not show on this screen again, unless you untick the default display option at the top right of the screen.