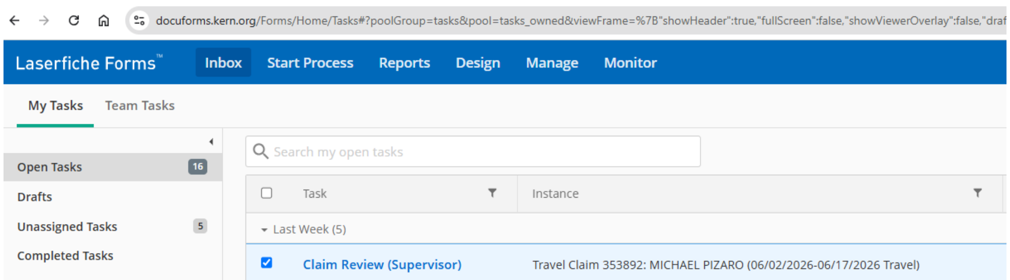
Travel Claims

Supervisor Approver – How to Approve Travel Claims

<u>Step 1 – Begin the Supervisor Approver Process</u>

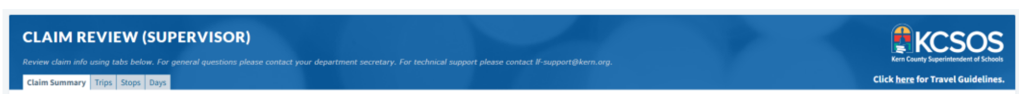
Once the Accountant approves a claim, the Supervisor will receive an email notification with a link to the Laserfiche (LF) Inbox to review and approve.

1.1 From your LF Inbox, click Claim Review (Supervisor).



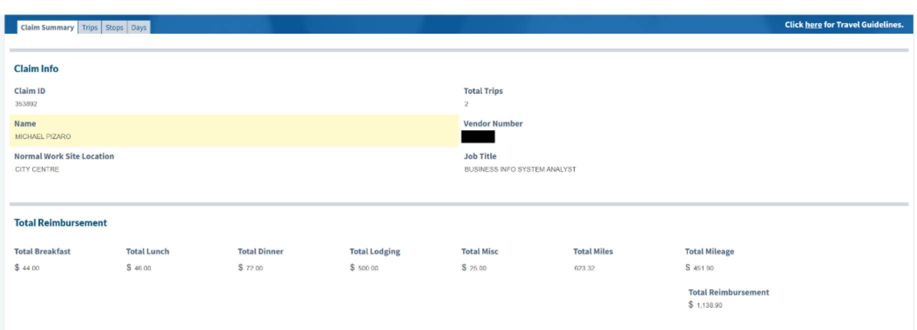
<u>Step 2 – Claim Review Supervisor Page</u>

2.1 The Supervisor shall review the details of the claim for accuracy.



<u>Step 3 – Claim Info Section</u>

3.1 The Supervisor shall review the details of the claim for accuracy.



This tab shows the Claim Info, and Claim totals. The amount of trips on the claim is listed as "Total Trips", and the totals are for ALL Trips on the Claim.

Step 4 – Claim Summary Section

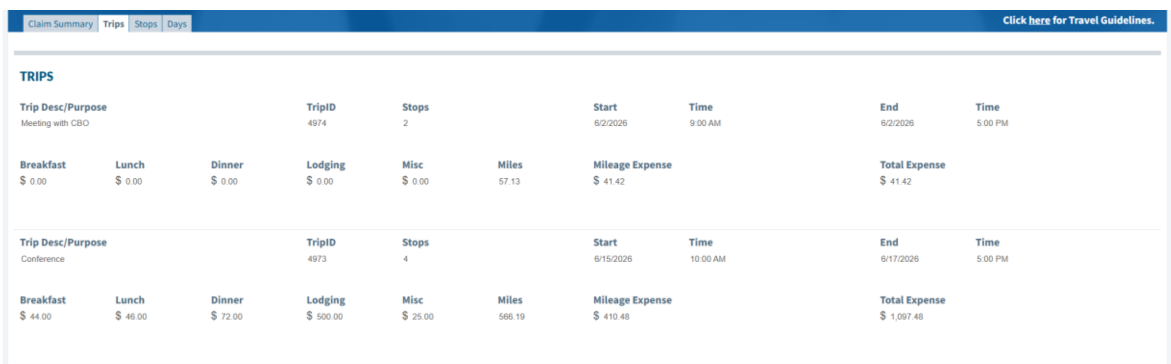
4.1 The Supervisor can also view the claim by using the “View Summary” Button.

Clicking the “View Summary” Button will open a printable version of the claim information, containing pages for Days, Stops, and Trips.

Step 5 – Trips, Stops, and Days Tabs

5.1 Alternatively, the Supervisor can review the Claim information from the Trips, Stops, and Days Tabs.

Trips



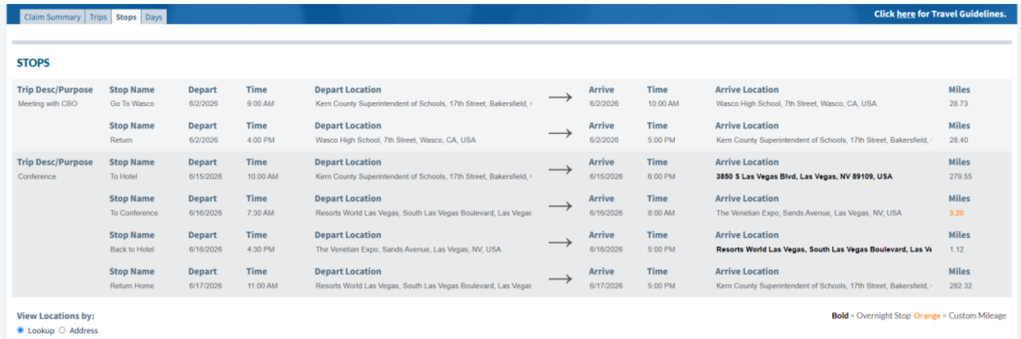
This tab shows the Trip Info, amount of Stops per Trip, totals per Trip, Start and End Dates/Times and more.

If there are multiple Trips on the Claim, they will be listed here as well.

To view more detailed information such as Stops, and Mileage (Per Stop), review the Stops tab.

To view more detailed information such as Day Expenses, Misc Expenses, and Lodging Attachments, view the Days tab.

Stops

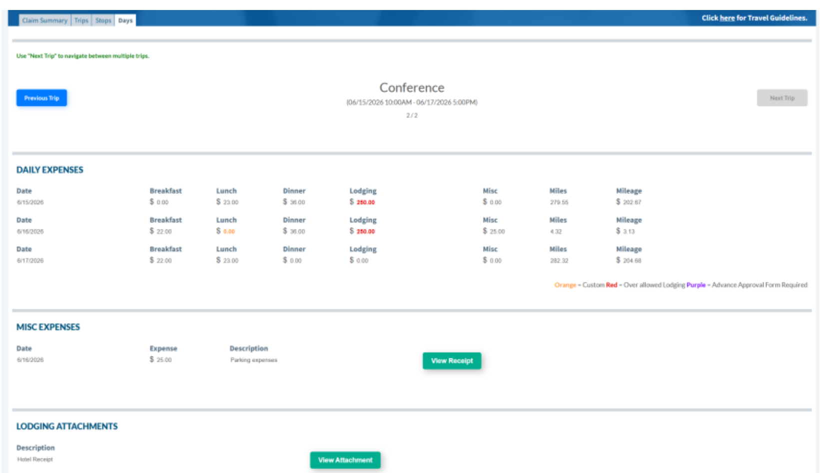


This tab shows information per stop. The Depart Date, Time, and Location, the Arrive Date, Time, and Location, as well as the mileage between each.

If an Arrive Location is Bold, this indicates the overnight stay.

If a Miles field is Orange, this indicates custom mileage was used (Instead of the mileage provided by Google Maps).

Days



Toward the top of this tab you can navigate through the multiple Trips in the Claim.

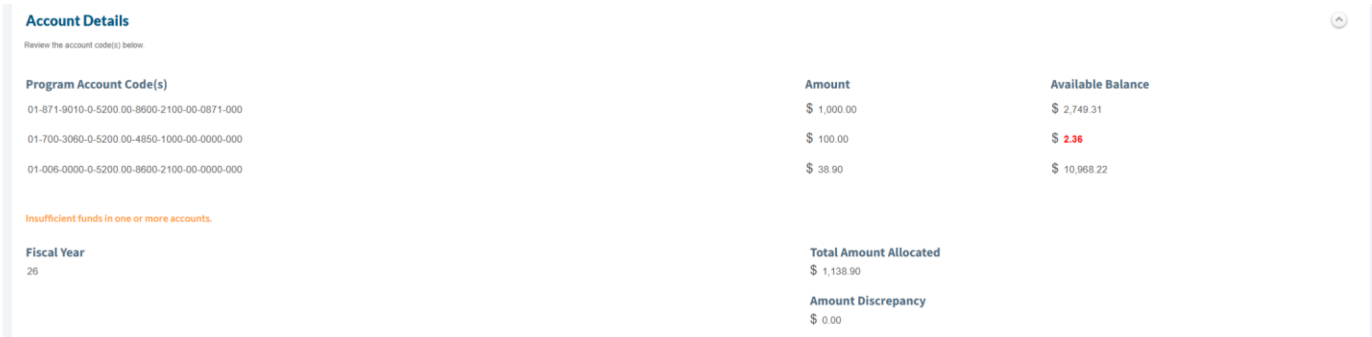
For each Trip, this tab displays each date of the trip, as well as the Breakfast, Lunch, Dinner, and Lodging Expenses. The total Misc Expense Amount, Miles, and Mileage amount for that day is shown as well.

Misc Expenses are listed, and if a Receipt is provided, can be viewed by clicking the "View Receipt" Button.

Lodging Attachments are listed as well and can be viewed by clicking the "View Attachment" Button.

Step 6 – Account Details Section

6.1 Review the program account code(s), and amounts. If changes are needed to the Account Codes, the Claim can be referred back to the Secretary.


Account Details

Review the account code(s) below.

Program Account Code(s)	Amount	Available Balance
01-871-9010-0-5200.00-8600-2100-00-0871-000	$ 1,000.00	$ 2,749.31
01-700-3060-0-5200.00-4850-1000-00-0000-000	$ 100.00	$ 2.36
01-006-0000-0-5200.00-8600-2100-00-0000-000	$ 38.90	$ 10,968.22

Insufficient funds in one or more accounts.

Fiscal Year
26

Total Amount Allocated
$ 1,138.90

Amount Discrepancy
$ 0.00

When the form is loaded, the Available Balance is pulled from the Financial System.

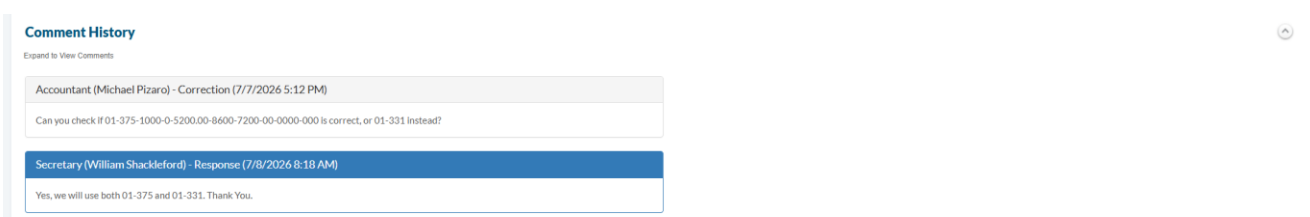
It may take a few hours for the Available Balance on the form to update, after changes are made in QSS. Claims that are in progress do not encumber or apply to the Available Balance. Only when the transfer is complete in QSS will the available balance change.

The Laserfiche Travel Claims process does not facilitate any Budget Transfer requests. Any existing procedures for Budget Transfers are still in effect and should be followed accordingly.

Email your budget transfer request to businessoffice@kern.org. Although there are insufficient funds, you can continue with the claim process. It is recommended to have advanced knowledge of which account codes to charge for this claim.

Step 7 - Comment History Section

7.1 If the claim has been referred back prior to Supervisor Approval, the Supervisor can view all the previous correspondence here.


Comment History

Expand to View Comments

Accountant (Michael Pizaro) - Correction (7/7/2026 5:12 PM)

Can you check if 01-375-1000-0-5200.00-8600-7200-00-0000-000 is correct, or 01-331 instead?

Secretary (William Shackleford) - Response (7/8/2026 8:18 AM)

Yes, we will use both 01-375 and 01-331. Thank You.

Step 8 - Approve Claim Section

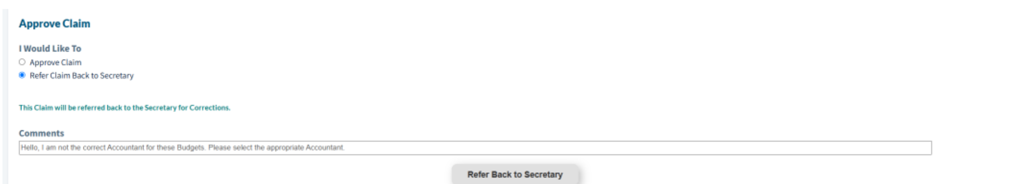
8.1 Select Approve Claim (there are no issues to resolve before submitting claim for reimbursement)

- 8.1.1 Agree to the Terms
- 8.1.2 Open the Signature Field and Sign
- 8.1.3 Press the “Approve Claim” button

After the Supervisor Submits the Claim, it will be routed to Final Review.

8.2 Select Refer Back to Secretary (if there is a correction required)

- 8.2.1 Select Refer Back Claim
- 8.2.2 Enter reason for correction in the Comments field
- 8.2.3 Click on Refer Back to Secretary button
- 8.2.4 The claim will route to the Secretary for Corrections



If the Supervisor needs the Claim to be corrected, or wants to ask for more information, the Supervisor can refer the claim back to the Secretary. (Ex: Question about Budgets, Wrong Corrections needed, etc.)

The Secretary can adjust Budgets, choose another Accountant, or refer back to the Employee/Submitter for any other corrections to the claim.

Step 9 – Submit Approved Claim to Final Review

Once the claim is approved by the Supervisor, it will move to the Final Review by Accounts Payable.

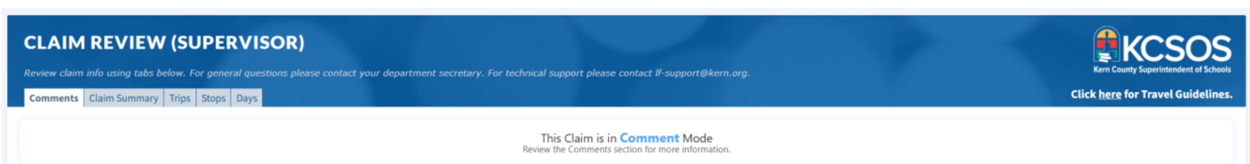
9.1 As the claim moves through the approval process, it may be returned for further corrections. If so, an email notification will be sent to the appropriate parties for correction and resubmission.

9.2 Once no further action is required, the claim will be processed for reimbursement by the designated deadlines determined by the Business Office.

Step 10 – Comment Mode

10.1 Final Review may return the Claim to the Submitter, Employee, Secretary, or Accountant for Corrections or Comments.

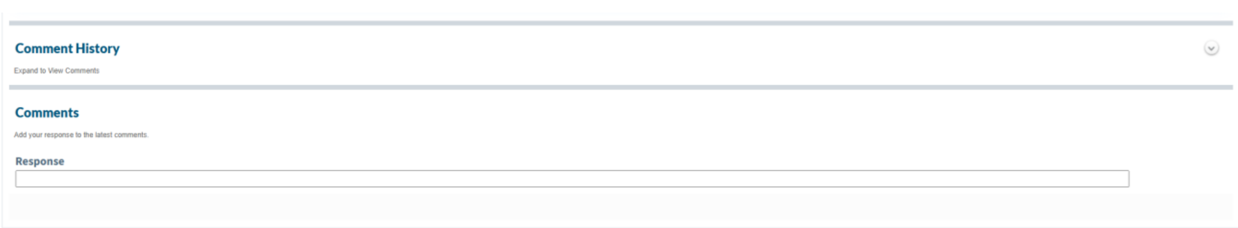
10.2 Final Review may also return the Claim to the Supervisor for Comments.



When a Claim is referred back to the Supervisor for Comments, a "Comment" Banner will appear at the top of the screen.

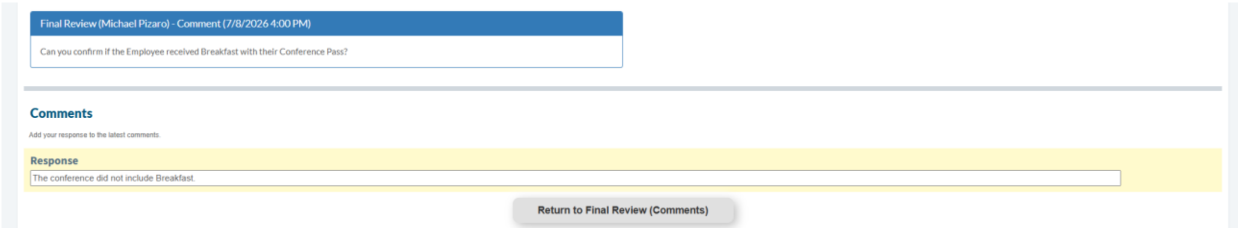
In Comment Mode, the Supervisor cannot refer the claim back for Corrections (This can only be done by Final Review).

A new Comments Tab will be visible; this is where the Supervisor can view and respond to the Comment from Final Review.



The Comments Tab will show the Comment History (Contains all comments throughout the Claim) as well as how the Supervisor can respond to Comments.

10.3 The Supervisor will need to add a response and send the Claim back to Final Review.



All previous Comments are visible in the Comment Section above the response.