

Open and Review a Submitted Receipt - PCard Reviewers

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Open and Review a Submitted Receipt

1. Locate the receipt in your **Open Tasks**.
2. Click on the receipt that you wish to open and review.
3. Click the **Edit** button to open the receipt.

The screenshot shows the MIT PCard Reviewer interface. At the top is a navigation bar with links: BACK TO HOME, REPORT VIEW, AUDIT, WORKFLOW HISTORY, and INFORMATION ON UNALLOWABLE CHARGES. A 'Logout' button is on the right. The main content area is divided into several sections. On the left, a 'Receipt' section shows an image of a receipt with a barcode. Below it is a 'Watchdog .JPG.pdf' file. In the center, a 'Expense Type' section shows 'Books and Publication' with a dropdown menu. Below that is a 'Cost Object Information' section with fields for 'Cost Object' (1429500), 'Start Date' (2014-08-01), 'End Date' (2015-12-31), and 'Description' (EIT & EIS SITE EXPENSES). To the right of this is a 'Summary Information' section showing 'Receipt #562', 'Total Amount 0.00', 'Expense Status: Approved', 'Created By: PCard Reviewer', and 'Created On: 12/16/2015'. Below the 'Expense Type' section is a 'Business Justification' section with a text area. At the bottom, there is a 'SAP Transactions' section showing 'Cardholder: PURCHASER', 'SAP Transaction Match Found', and a table with columns 'DATE', 'DOC_ID', 'VENDOR', and 'AMOUNT'. The table contains one row: '2015-12-31', '001100000', 'MIT BOSTONGLOBE SUBSCR', and '55.96'. On the far right, there is an 'Actions' section with buttons: 'Approve', 'Reject', 'Save Draft', and 'Reassign'. Below these buttons is a link 'Add Another Vendor?'. Annotations with arrows point to various parts of the interface: 'Menu options' points to the top navigation bar; 'Attached receipt' points to the receipt image; 'Expense Type, Cost Object, and Amount' points to the 'Expense Type' and 'Cost Object Information' sections; 'Summary Information' points to the 'Summary Information' section; 'SAP Transactions' points to the 'SAP Transactions' section; and 'Actions' points to the 'Actions' section.

Menu Options run along the top of the window. Options include:

- **< Back Home** returns you to the Open Tasks view
- **Report View** creates a PDF of the receipt in its present state.
- **Audit** opens a pop-up with processing detail for the receipt.
- **Workflow History** displays a chronological list of the receipt's current status and previous status changes.
- **Information on Unallowable Charges** displays a pop-up that lists expenses that, per MIT policy, should not be purchased on a procard.

Attached Receipt is the image of the purchase receipt. If there are multiple images, you will see this beneath the image of the first, and you can use the navigation controls to view the others.

Expense Type, Cost Object, and Amount may be blank if the cardholder did not make these entries. If this is the case, you as their reviewer will be responsible for providing these entries.

SAP Transaction is where you can link the receipt to the procard's SAP transaction.

Summary Information displays Total Amount, Status of the receipt, Created By name, and Created On date.

As a Reviewer, You Should...

- **Verify the details** if the cardholder entered them.
 - Are the receipts of sufficient detail? Are the correct receipts attached?
 - Are the expense type and cost objects correct.
 - If they selected a Food related expense type, did they provide the names of the attendees?
 - If they split the expense, were the splits correctly define?
 - Is the business justification of sufficient clarity and detail?
 - Is the expense for an allowable purchase?
- **Provide Details** if the cardholder provided none.
- **Link the Receipt to an SAP Transactions.**
- **Complete your review in a timely manner** to insure the charge is not swept.

Actions you can take as a Reviewer

The actions that you can take are listed on the screen below the Summary Information. They are:

- **Pass Review** – click this to indicate that you have completed your review of the receipt and are now forwarding it to your verifier who will be responsible for approving the receipt. The passed receipt will be listed in your In-Process view.
- **Return** – click this when the receipt has not passed your review. This returns the receipt to the cardholder. Use the Internal Comments field to provide a reason why the receipt is being returned. The cardholder will see the receipt in their Open Tasks tab. You will see the receipt in your In Process tab.
- **Save as Draft** – Click this when you have made updates to the receipt but are not yet ready to return it or to forward it on the verifier. The receipt will be listed in your Open Tasks.
- **Reassign (For Reviewer1 only)** allows you to transfer the receipt to another reviewer. When you select this option, a pop-up displays a list of authorized reviewers. Select the desired reviewer from this list. The assigned-to reviewer will see the receipt in their Open Tasks tab. You will see the receipt in your In Process tab.
- **Change Verifier (for Reviewer 2 only)** allows you to identify a different verifier for the receipt. When you select this option, a pop-up displays a list of authorized verifiers. Select the desired verifier from this list. Once you Pass Review on the receipt, the system will route the receipt to the new verifier's Open Tasks tab. You will see the receipt in your In Process tab.

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