How to find & progress the status of your claim

This guide is for use by medical officers and support staff to find the status of expense reports (claims), both pending and historic, using Oracle and/or SHARP.

Where applicable, further guidance is offered on how to progress the claim.

Contents

Find the status of your claim (expense report)

1. Log in to Oracle iExpense using your HAD details at https://erp.had.sa.gov.au while using Microsoft Edge on a computer connected to the SA Health network.

2. Click 'Internet Expenses' to take you to the Expenses Home page shown in the picture below.

3. Refer to the 'Report Status' field of the relevant expense report row (or the 'Status' field if the expense report appears under the Update Expense Reports table as it is not submitted).

4. Refer to the diagram on the next page, to understand where your expense report is in the workflow. For ideas on how to progress your claim dependent on the report status, refer to How to progress your expense report.

MOPDRS Expense Report Workflow

MO Delegate

'Create Expense Report'

MO

'Create Expense Report'

INCOMPLETE

Approve draft for submission

PENDING INDIVIDUAL'S APPROVAL

RETURNED

WITHDRAWN

REJECTED

PENDING YOUR RESOLUTION

Change to $ amount is required

OCS

'Submit'

Yes

Validation check — Failed — Reason for validation fail

Further action required by MO

System Admin

Passed

Workflow could not route for approval

PENDING SYSTEM ADMINISTRATOR ACTION

DLM

'Reject' (with justification)

PENDING MANAGER APPROVAL

Review for approval

Request More Info./ Claim timed out (10 days)

Send Additional Info.

'Approve'

PDO

Report Status in blue box = submitted claim (expense report is in workflow, so will appear under Track Submitted Expense Reports table in Expense Home) and will be reserving the claim amount of the MO's balance to avoid MO claiming more than their balance.

Report Status in grey box = unsubmitted or withdrawn claim (expense report is not in workflow, so will appear under Update Expense Reports table in Expense Home) and will not be reserving any amount of balance.

MOPDRS Expense Report Workflow v1.2

PENDING PAYABLES APPROVAL

Further info. required?

Yes

Send Additional Info.

No

AP/Payments

READY FOR PAYMENT → PAID

How to progress your expense report

[Expense] Report (Claim) Status	Meaning
IN PROGRESS	Medical officer (MO) has not submitted, outside of workflow.
INCOMPLETE	A deleted claim (only visible on SHARP reporting).
PAID	Process complete, reimbursement sent to MO's bank account
PENDING INDIVIDUAL'S APPROVAL	Claim submitted to MO from their admin delegate
PENDING MANAGER APPROVAL	Direct line manager (DLM) to approve
PENDING PAYABLES APPROVAL	PD Officer to review
PENDING SYSTEM ADMINISTRATOR ACTION	No DLM available in CHRIS / Oracle – workflow could not route for approval
PENDING YOUR RESOLUTION	Claim returned to MO by PDO (or DLM) for further information or action
READY FOR PAYMENT	To be processed in next pay run assuming MO's bank details have been entered by MO
REJECTED	DLM has disapproved the claim
RETURNED	Returned to MO by iExpense automatically, requires further action by MO
WITHDRAWN	MO has withdrawn claim

In Progress

You have created an expense report but not yet submitted it for approval.

Incomplete

This report status only appears in SHARP reporting. It means you have created an expense report and then since deleted it on Oracle. The claim is still in SHARP and it flags as 'INCOMPLETE'.

Paid

Check that the bank account you provided details for in SAH MOPD Bank Update has been credited with the amount that was to be reimbursed.

If you have received payment, then no further action is required.

If you have not received payment, contact APHealthPayments@sharedservices.sa.gov.au quoting the EXP reference number and state that the report status is Paid yet you have not received payment. Contact Health.PDReimbursement@sa.gov.au if you do not receive a resolution.

Pending Individual's Approval

This means your administrative delegate has drafted an expense report in Oracle for your approval/submission to your direct line manager (DLM).

MO receives email, can approve via email or logging in

Pending Manager Approval

This means you successfully submitted your expense report and it is awaiting review by your direct line manager (DLM) for approval.

No further action is required from you, though you may withdraw the expense report if you wish.

Pending Payables Approval

This means your expense report has been approved by your direct line manager (DLM) and is due to be processed (checked for correct documentation and data) by your agency's PD office.

No further action is required from you, though you may withdraw the expense report if you wish.

Please allow at least one week before seeking an update on when the claim may be processed.

If you have any specific questions about the status of your claim, contact your local PD Office using the contact details at the bottom of the MOPD intranet page: Medical Officer Professional Development :: SA Health.

Pending System Administrator Action

Contact Health.PDReimbursement@sa.gov.au from your SA Health email account stating that EXP (quote the EXP reference number) is 'Pending System Administrator Action'.

Pending Your Resolution

This typically means one of three things:

1. Your local **PD officer** has identified that the **expense report requires a correction or further information** (e.g. due to a discrepancy between receipt and inputted data or a required document is missing) before the claim can be paid and has sent the claim back to you to provide the information or make a change.

2. Your **direct line manager is seeking more information** about the claim.

3. Your **direct line manager (DLM) has not approved the claim within 10 business days** so the system has sent the claim back to you.

To determine what you need to do, first check the **Approval Notes** either in the system generated **email** sent to you from *Health.OCSWFmail@health.sa.gov.au* referring to the relevant EXP reference number, or by logging into Oracle on a computer connected to the SA Health network, clicking Internet Expenses and referring to the **Notifications** table (example pictured below) and clicking the relevant EXP in the Subject column.

If the Approval Notes message (from your local PD officer or your DLM) suggests you are required to change something that impacts the amount that will be reimbursed to your or will be subtracted from your balance (such as changing the receipt amount of a line item, adding/removing a line or changing an expense type or tax declaration), you need to withdraw the claim, make the required change and resubmit. Refer to How to withdraw an expense report (PDF 211KB).

If the Approval Notes message does not suggest a change to an amount, expense type or line is required then refer to the following steps depending on whether you need to provide information or an attachment.

If you need to provide **information only** and not an attachment, you can either click the '**Send Additional Information**' button at the bottom of the email, or on the Oracle page after navigating to the relevant EXP under the **Notifications** section on the Expenses Home page.

If the 'Send Additional Information' button does not appear in Oracle and you do not have an email related to that expense report, contact Health.PDReimbursement@sa.gov.au.

How to add an attachment

If you need to add an attachment to an expense report that is Pending Your Resolution:

1. Go to Oracle > Internet Expenses and under Track Submitted Report heading select the expense report number hyperlink.

2. Under General Information heading, select the **Add** button

3. Select the **Browse** button to choose and upload your file

4. Select **Apply** button at the top right hand of screen when file is uploaded

5. You can check that your file is uploaded by selecting the view hyperlink next to the *Add* button

6. Select the **Return** button to go back to Expense Home page

7. Under the **Notifications** heading, select the expense report number that was updated with invoice and/or receipt

8. Expense report number can be found under *Subject* heading
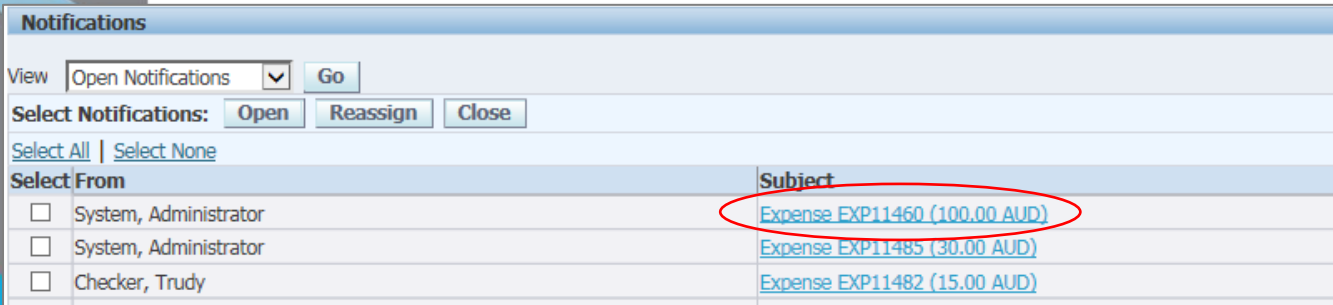
9. Under *Response* heading, add message and select Send Additional Information button to return your expense report to the requestor
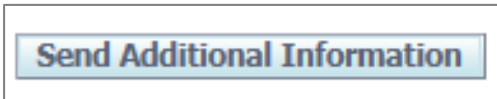
Your DLM has not approved the claim within 10 business days

If you receive an email with 'Action Required' in the subject line and a message in the body of the email stating 'The last approver, [your DLM's name], did not respond to the approval notification for this expense report', click the '**Resend To Approver**' link at the bottom of that email and send the subsequent email that appears.
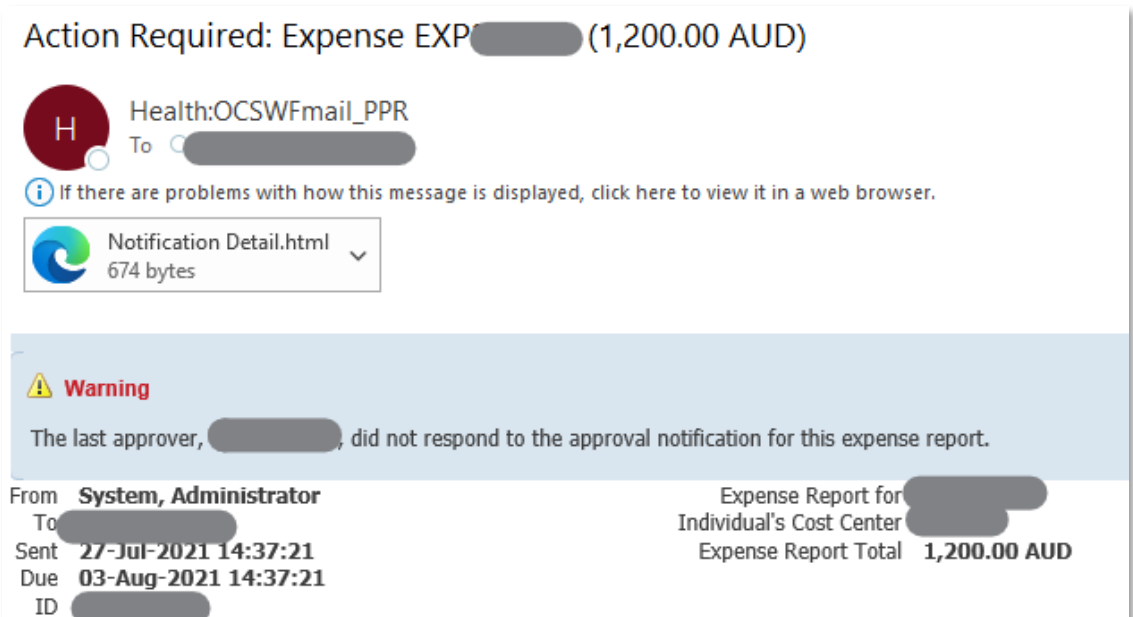
Ready for Payment

You can expect to receive payment within 3 business days following a claim having Ready for Payment status.

If the report has had Ready for Payment status for more than 3 days, log in to Oracle, and click *'SAH MOPD Bank Update'*:

- **If your bank details are not entered**, enter and save your bank details and quote your EXP number in an email to APHealthPayments@sharedservices.sa.gov.au, stating that you have updated your bank details and the expense report is Ready for Payment.

- **If you bank details are already entered**, contact Health.PDReimbursement@sa.gov.au for assistance.

Rejected

Your direct line manager (DLM) has decided not to approve your claim and should have provided justification for this in the Approval Notes tab. Follow up with your DLM if you wish to further pursue this claim and arrange to resubmit the claim if applicable.

Returned

The system has automatically 'returned' the expense report to you instead of submitting it to your direct line manager (DLM) for approval due to the expense report failing at least one validation rule.

Select the expense report in Oracle and go to Step 4 (i.e. the Confirmation page) and refer to the validation message in bold about half way down the page, below the cost breakdown and above the General Information section.

Refer to Validation Messages (Step 4) in Fact sheet - Error messages (PDF 351KB) for ideas on how to resolve the various validation errors.

Reach out for support if you are unable to resolve.

Withdrawn

The expense report has been withdrawn from the workflow so requires your input and resubmission before it can be processed.

Withdrawn expense reports allow for the editing of any of the lines' receipt amount, expense type and tax declarations.

After you have edited your claim (where applicable), resubmit the claim by clicking the pencil icon under Update Expense Reports table on Expense Home (after logging into Oracle and clicking Internet Expenses) and clicking Next until you reach Step 4 of 4, where you can click Submit.

Expected wait times and additional support

Note:
- Most claims are paid within 15 business days following submission.
- Wait times vary depending on the complexity of the claim and the volume of claims being processed at that time.
- High volume periods tend to coincide with the end of the PD year. For quickest processing times, based on historical data, we recommend submitting your claims between the months of May to January, where possible.

Report (Claim) Status	Expected wait time
IN PROGRESS	Dependent on MO's action
INCOMPLETE	Dependent on MO's action
PAID	N/A
PENDING INDIVIDUAL'S APPROVAL	Dependent on MO's action
PENDING MANAGER APPROVAL	- Your direct line manager (DLM) has 10 business days to approve the claim before it is automatically sent back to you for action. - A majority of claims are approved within 5 business days.
PENDING PAYABLES APPROVAL	- Wait times vary depending on the complexity of the claim and the volume of claims being processed but most claims are processed by the PD Office within 10 business days.
PENDING SYSTEM ADMINISTRATOR ACTION	- Within 5 business days once reported to Health.PDReimbursement@sa.gov.au
PENDING YOUR RESOLUTION	Dependent on MO's action
READY FOR PAYMENT	- MO should typically receive payment within 3 business days following a claim having Ready for Payment status. - If the report has had Ready for Payment status for more than 3 days, log in to Oracle, and click *'SAH MOPD Bank Update'*. **If your bank details are not entered**, enter and save your bank details and quote your EXP number in an email to APHealthPayments@sharedservices.sa.gov.au, stating that you have updated your bank details and the expense report is Ready for Payment. **If you bank details are already entered**, contact Health.PDReimbursement@sa.gov.au for assistance.
REJECTED	Dependent on MO's action
RETURNED	Dependent on MO's action
WITHDRAWN	Dependent on MO's action

Additional Support

If you have any specific questions about the status of your claim, contact your local PD Office using the contact details at the bottom of the MOPD intranet page: Medical Officer Professional Development :: SA Health.

View claim history

Using Oracle

Advantages (+) and disadvantages (-) to viewing claim history using Oracle:

+ Expense reports can be duplicated to claim for similar items
- Does not include claims made at previous agencies (LHN or state-wide service), if applicable.

Steps:

1. Log in to Oracle (using HAD details at https://erp.had.sa.gov.au)
2. Click 'Internet Expenses'
3. Click 'Expense Reports' (second heading in the top menu)
4. Click the 'Go' button

Using SHARP

Advantages (+) and disadvantages (-) to viewing claim history using Oracle:

+ Includes complete history of claims, regardless of whether you have moved agency.
- Expense reports cannot be duplicated to claim for similar items.
+/- Includes pending claims but the data is only refreshed in the evening so any change to the report status during the day will not be reflected until later that night.

Steps:

1. Log in to SHARP (using HAD details at https://sharp.had.sa.gov.au)
2. Towards the top right of the page, click 'Dashboards' menu
3. Click 'MOPD Dashboard'
4. In the default report page ('MO Summary') – the page should automatically load this page after following Step 3 – click the 'Continue' button at the right end of the yellow bar running across the near-top of the page.

For more information

Medical Officer Professional Development Reimbursement System (MOPDRS)
Clinical System Support & Improvement, SA Health
Health.PDReimbursement@sa.gov.au
sahealth.sa.gov.au/reimburseme
For Official Use Only-A1-I1

Government
of South Australia

SA Health