Updating, Deleting, and Withdrawing Expense Transactions Overview

Cardinal allows users to update or delete expense transactions (Travel Authorizations, Cash Advances, and Expense Reports) after they have been saved or when they have been submitted but the approver has not taken action on the transaction.

The following are some key points related to accessing and updating expense transactions in Cardinal:

- When an expense transaction is saved, navigate to the corresponding **Find an Existing Value Search** page to access it and make updates
- When an expense transaction has been submitted, it must be withdrawn by navigating to the corresponding **View** page for the applicable transaction first
- When expense transactions are deleted, they cannot be viewed. The delete action is permanent and cannot be undone

This Job Aid identifies the requirements for updating, deleting, and withdrawing expense transactions and provides step by step instructions on how to do complete these actions.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

Revision History

Revision Date	Summary of Changes
7/31/2025	Baseline.

Updating a Travel Authorization

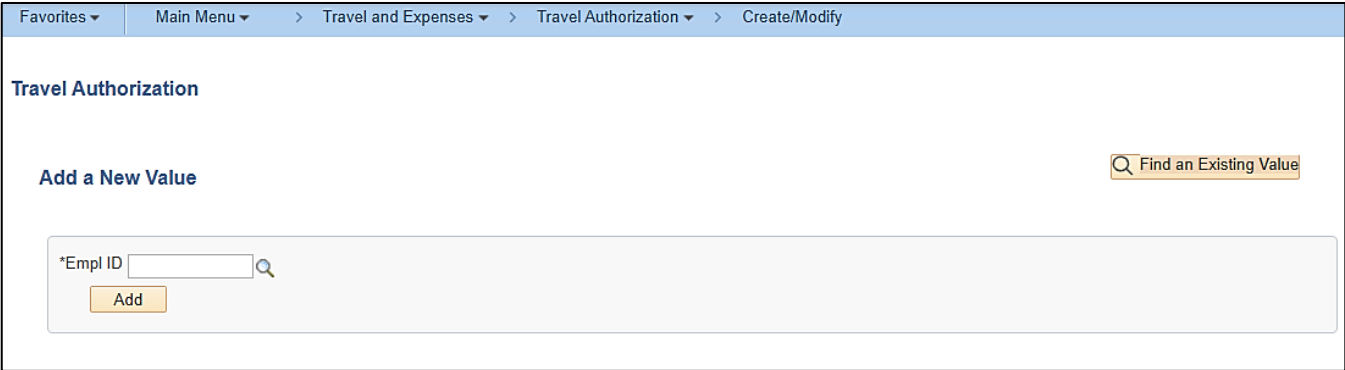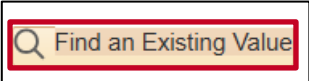A Travel Authorization can be updated if it has been:

- Saved, but not submitted for approvals
- Withdrawn from approvals after submission
- Sent back by the approver with a required comment. An email is sent to the employee or the proxy who keyed the Travel Authorization

A Travel Authorization cannot be updated if it has been:

- Approved
- Denied by the approver (denied Travel Authorizations must be deleted). An email is sent to the employee or proxy who keyed the Travel Authorization

This section will walk through the process for updating a Travel Authorization after it was saved.
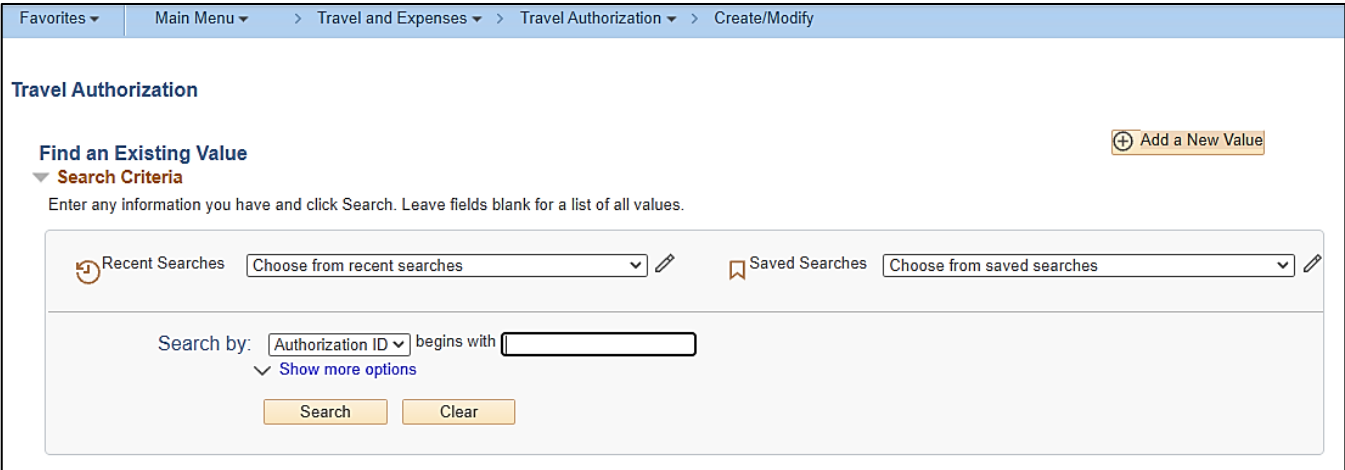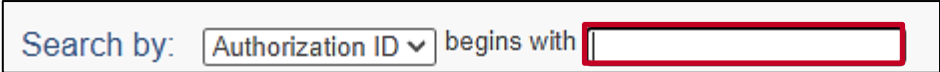
If the Travel Authorization was submitted, see the [Withdrawing Expense Transactions](#) section of this Job Aid.

Step	Action
1.	Navigate to the **Travel Authorization** page using the following path: **Main Menu > Travel and Expenses > Travel Authorizations > Create/Modify**
	The **Travel Authorization Add a New Value** page displays.
(i)	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Click the **Find an Existing Value** button.
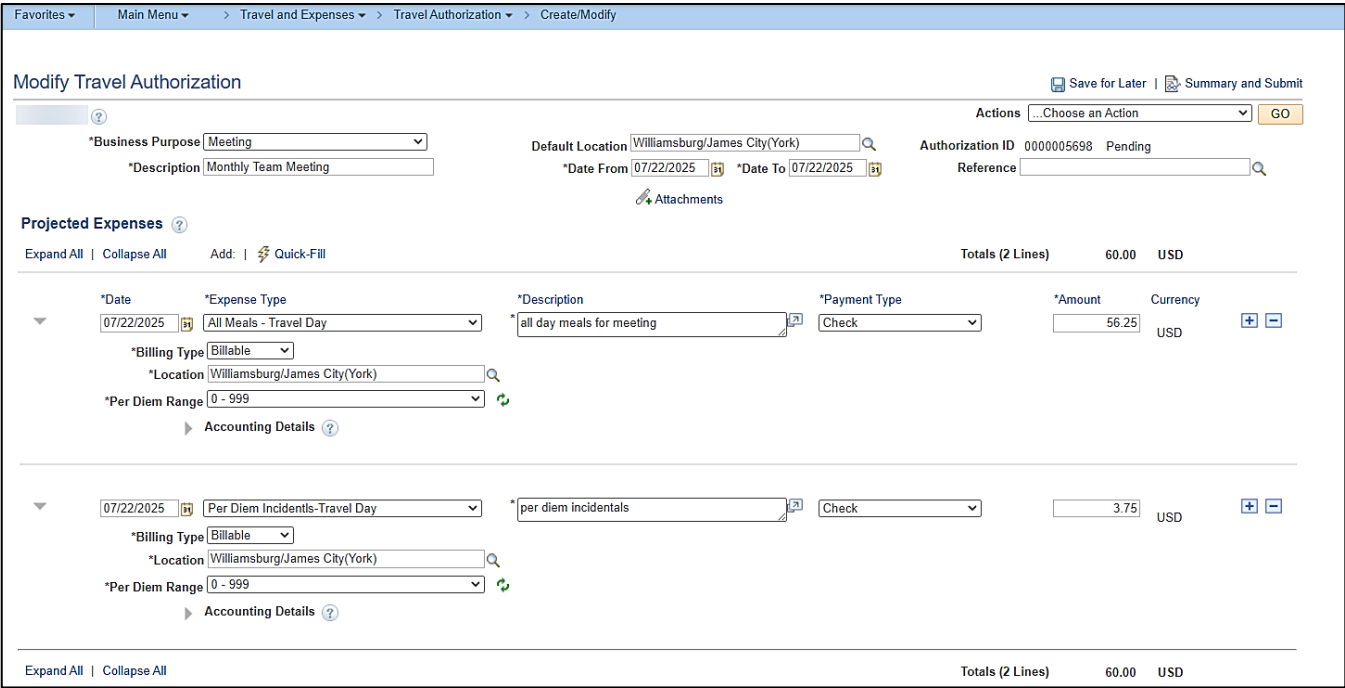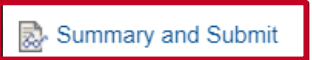
Step	Action
	The **Travel Authorization Find an Existing Value Search** page displays.

The **Travel Authorization Find an Existing Value Search** page displays.

Favorites ▾ | Main Menu ▾ | > Travel and Expenses ▾ | > Travel Authorization ▾ | > Create/Modify

Travel Authorization

Find an Existing Value   ⊕ Add a New Value
▾ **Search Criteria**
Enter any information you have and click Search. Leave fields blank for a list of all values.

🕓 Recent Searches [Choose from recent searches   ▼] ✎   🔖 Saved Searches [Choose from saved searches   ▼] ✎

Search by: [Authorization ID ▾] begins with [   ]
⌄ Show more options

[Search]   [Clear]

Step	Action
3.	Enter the applicable Travel Authorization ID Number in the **Search by** field. Search by: [Authorization ID ▾] begins with [ ]
ℹ	If the Travel Authorization ID Number is not known, search using the other options by clicking the **Search by** dropdown button. The other search options include "Description Name", "Empl ID", "Status", and "Creation Date".
4.	Click the **Search** button. [Search] [Clear]
ℹ	Users can only search for and update Travel Authorizations for employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the Job Aid titled **AP315_Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.

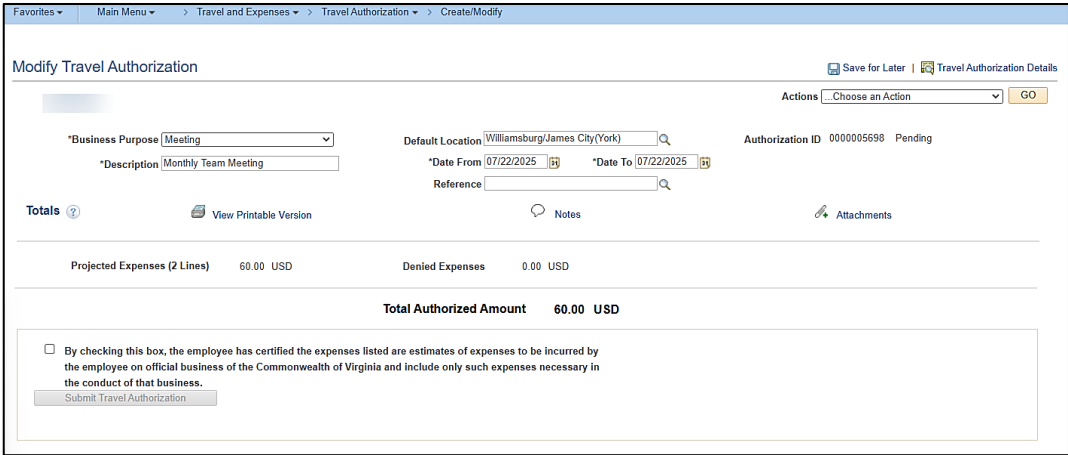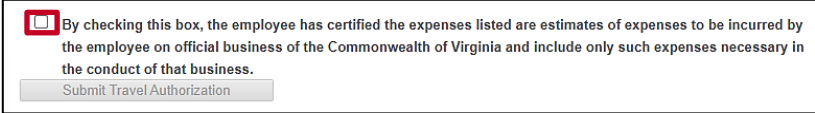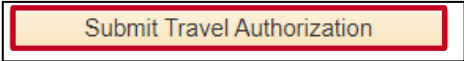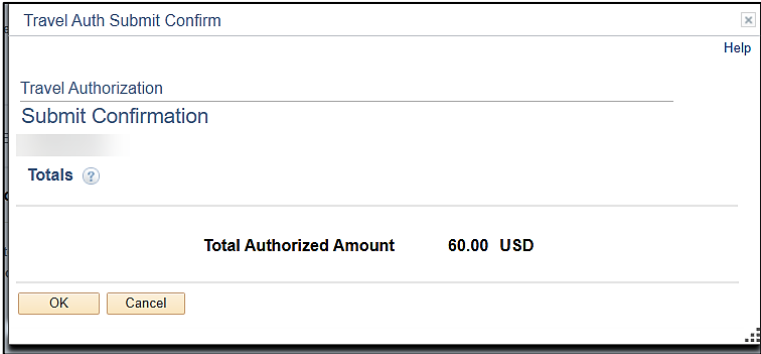| Step	Action
	The **Modify Travel Authorization** page displays.
5.	Make the applicable updates to the Travel Authorization (e.g. add or delete Lines, change amounts, dates, locations, etc.).
ℹ	If modifying a Travel Authorization that has been sent back by an approver, the user will see a **Sent Back for Revision** link that can be clicked to view the approver's comment. **Sent Back For Revision**
6.	Click the **Summary and Submit** link at the top of the page after completing all revisions. 📄 Summary and Submit
ℹ	Click the **Save for Later** link if the transaction is not ready to submit for approval.

Step	Action
	The **Modify Travel Authorization Summary and Submit** page displays.
7.	Click the **Certification Statement** checkbox option when the transaction is ready to be submitted.
ℹ️	The **Submit Travel Authorization** button is now enabled.
8.	Click the **Submit Travel Authorization** button to send the updated Travel Authorization through approval workflow.
	The **Travel Authorization Submit Confirmation** page displays in a pop-up window.

Step	Action
9.	Click the **OK** button to confirm the submission.
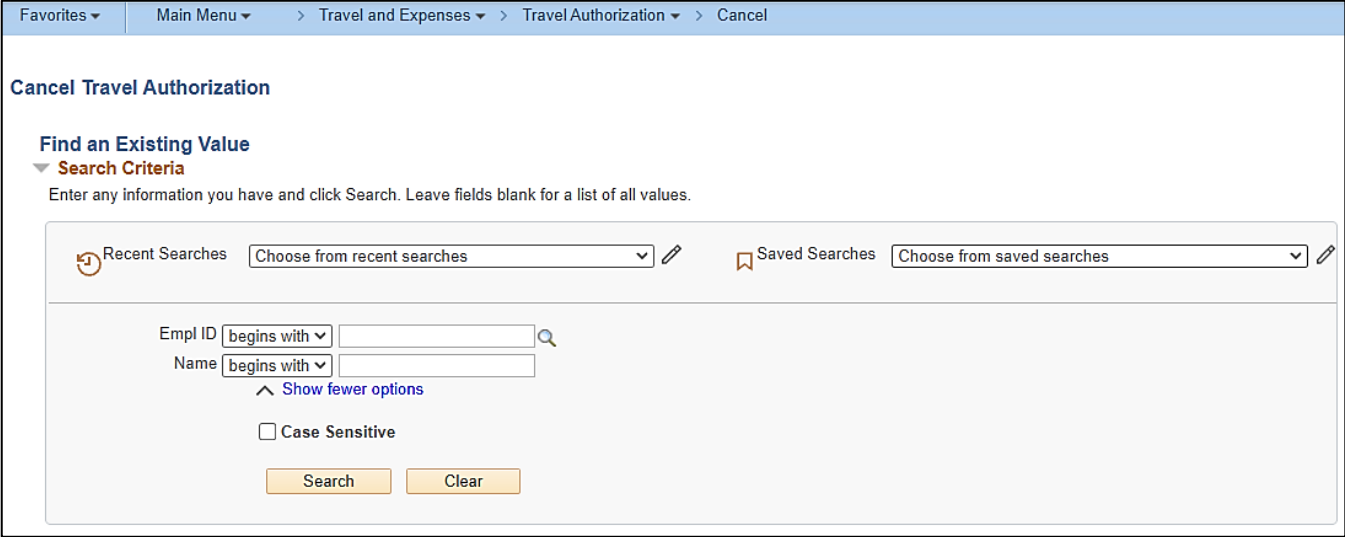
Canceling a Travel Authorization
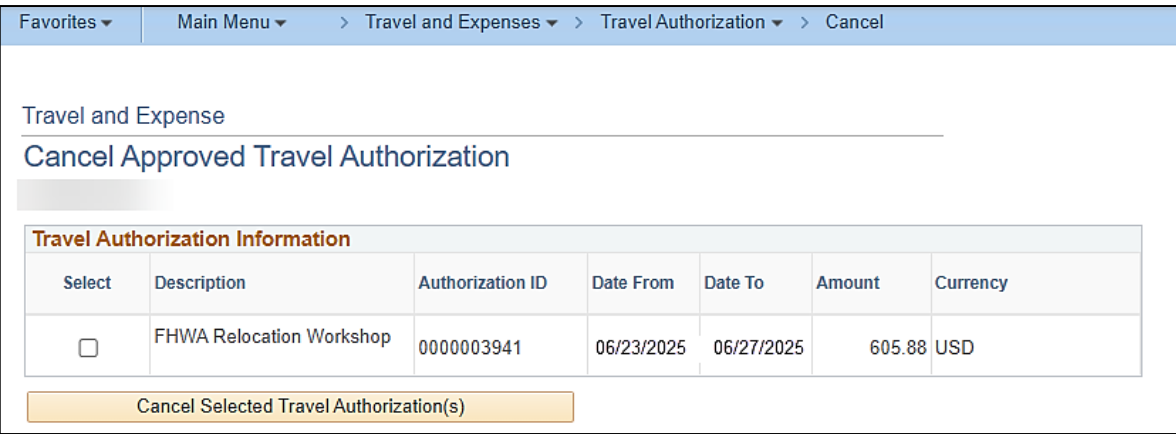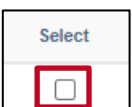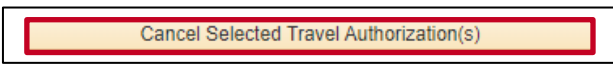
An approved Travel Authorization can be cancelled if it is no longer needed. Once cancelled, it cannot be assigned to an Expense Report.

Users can only cancel a Travel Authorization if it has been approved but not assigned to an Expense Report.

Step	Action
1.	Navigate to the **Cancel Travel Authorization** page using the following path: **Main Menu > Travel and Expenses > Travel Authorizations > Cancel**
	The **Cancel Travel Authorization Find an Existing Value Search** page displays.
ℹ	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	The user's Employee ID will default into the **Empl ID** field. Enter the applicable Employee ID or Name if cancelling a Travel Authorization for another employee. **Note**: Users can only search for and cancel Travel Authorizations for employees for whom they are a proxy.

Step	Action
3.	Click the **Search** button. [Search] [Clear]
	The **Cancel Approved Travel Authorization** page displays. Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Travel Authorization ▾ > Cancel Travel and Expense **Cancel Approved Travel Authorization** **Travel Authorization Information** <table><tr><th>Select</th><th>Description</th><th>Authorization ID</th><th>Date From</th><th>Date To</th><th>Amount</th><th>Currency</th></tr><tr><td>☐</td><td>FHWA Relocation Workshop</td><td>0000003941</td><td>06/23/2025</td><td>06/27/2025</td><td>605.88</td><td>USD</td></tr></table> [Cancel Selected Travel Authorization(s)]
ℹ	All Travel Authorizations for the employee that are eligible for cancellation display in the **Travel Authorization Information** section.
4.	Click the **Select** checkbox option for the Travel Authorization that requires cancellation. Select ☐
5.	Click the **Cancel Selected Travel Authorization(s)** button. [Cancel Selected Travel Authorization(s)]
ℹ	The cancel action is saved on the Travel Authorization.
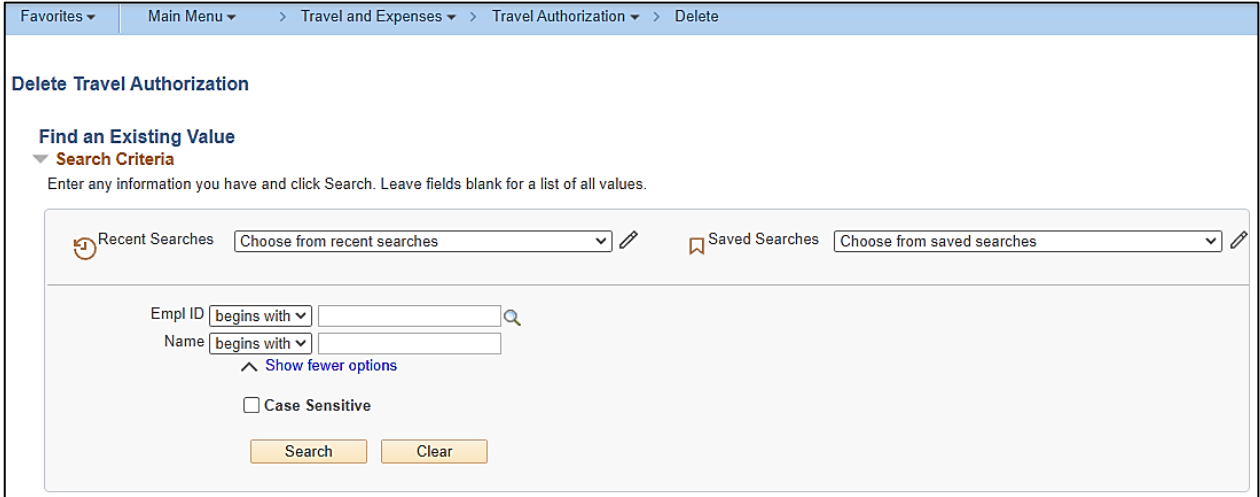
Deleting a Travel Authorization

Users can only delete a Travel Authorization if it has been:
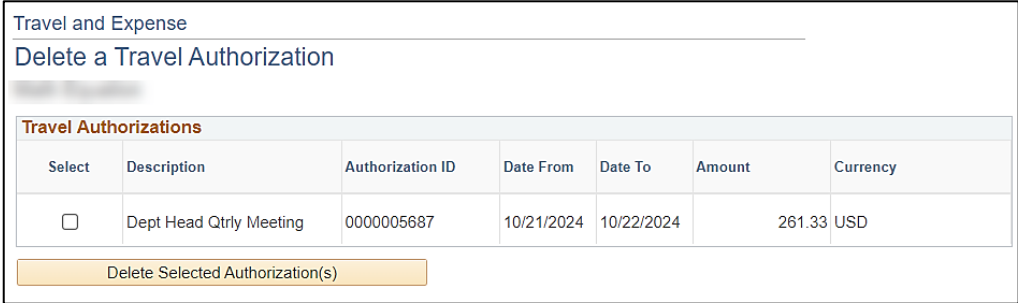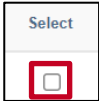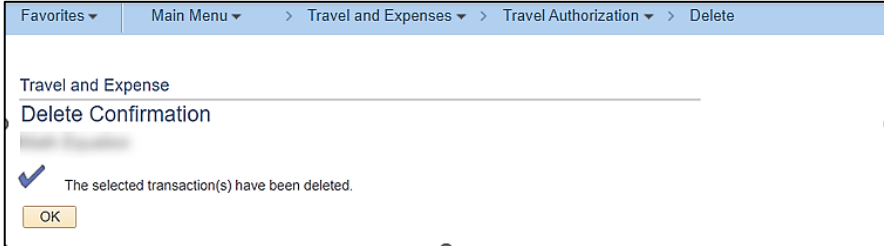
- Saved, but not Submitted for approvals
- Withdrawn from approval after submission
- Cancelled – approved Travel Authorizations that are not associated with an Expense Report can be cancelled by users with appropriate access
- Sent Back by the approver with a required comment. An email is sent to the employee or proxy who keyed the Travel Authorization
- Denied by the approver. An email is sent to the employee or proxy who keyed the Travel Authorization

Step	Action
1.	Navigate to the **Delete Travel Authorization** page using the following path: **Main Menu > Travel and Expenses > Travel Authorizations > Delete**
	The **Delete Travel Authorization Find an Existing Value Search** page displays.
ℹ️	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	The user's Employee ID will default into the **Empl ID** field. Enter the applicable Employee ID or Name if deleting a Travel Authorization for another employee.

Step	Action
(i)	Users can only search for and delete Travel Authorizations for employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the Job Aid titled **AP315_Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.
3.	Click the **Search** button.

The **Delete a Travel Authorization** page displays.

Travel and Expense
Delete a Travel Authorization

Travel Authorizations

Select	Description	Authorization ID	Date From	Date To	Amount	Currency
☐	Dept Head Qtrly Meeting	0000005687	10/21/2024	10/22/2024	261.33	USD

Delete Selected Authorization(s)

Step	Action
(i)	All Travel Authorizations for the employee that are eligible for deletion display in the **Travel Authorizations** section.
4.	Click the **Select** checkbox for the Travel Authorization that requires deletion.
5.	Click the **Delete Selected Authorization(s)** button.

A **Confirmation** message displays indicating that the selected transaction has been deleted.

Favorites ▾   Main Menu ▾   >   Travel and Expenses ▾   >   Travel Authorization ▾   >   Delete

Travel and Expense
Delete Confirmation

✔   The selected transaction(s) have been deleted.

OK

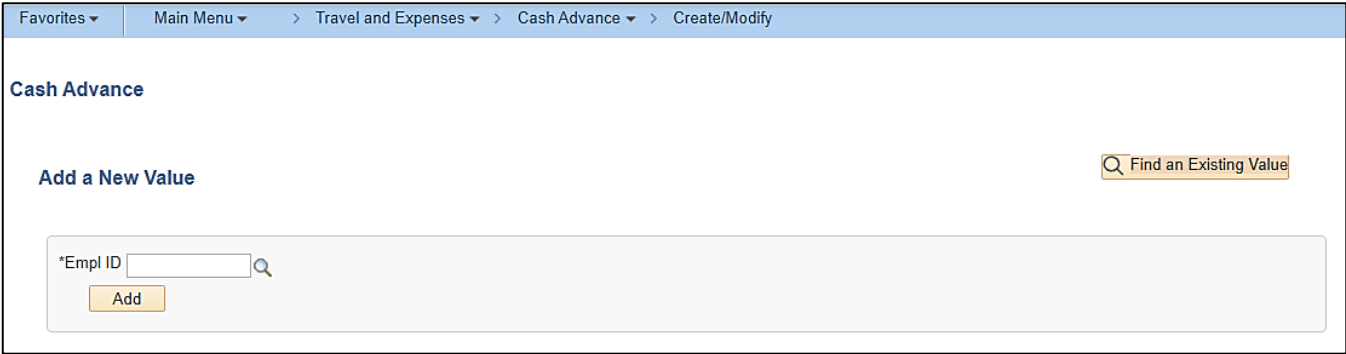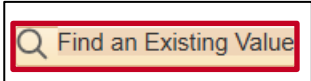| Step	Action
6.	Click the **OK** button. OK
ℹ️	A deleted Travel Authorization cannot be viewed. The deletion is permanent and cannot be undone.

Updating a Cash Advance

A Cash Advance can only be updated if it has been:

- Saved, but not been submitted for approval

- Withdrawn from approval after submission

- Sent Back by an approver with required comments. An email is sent to the employee or the proxy who keyed the Cash Advance
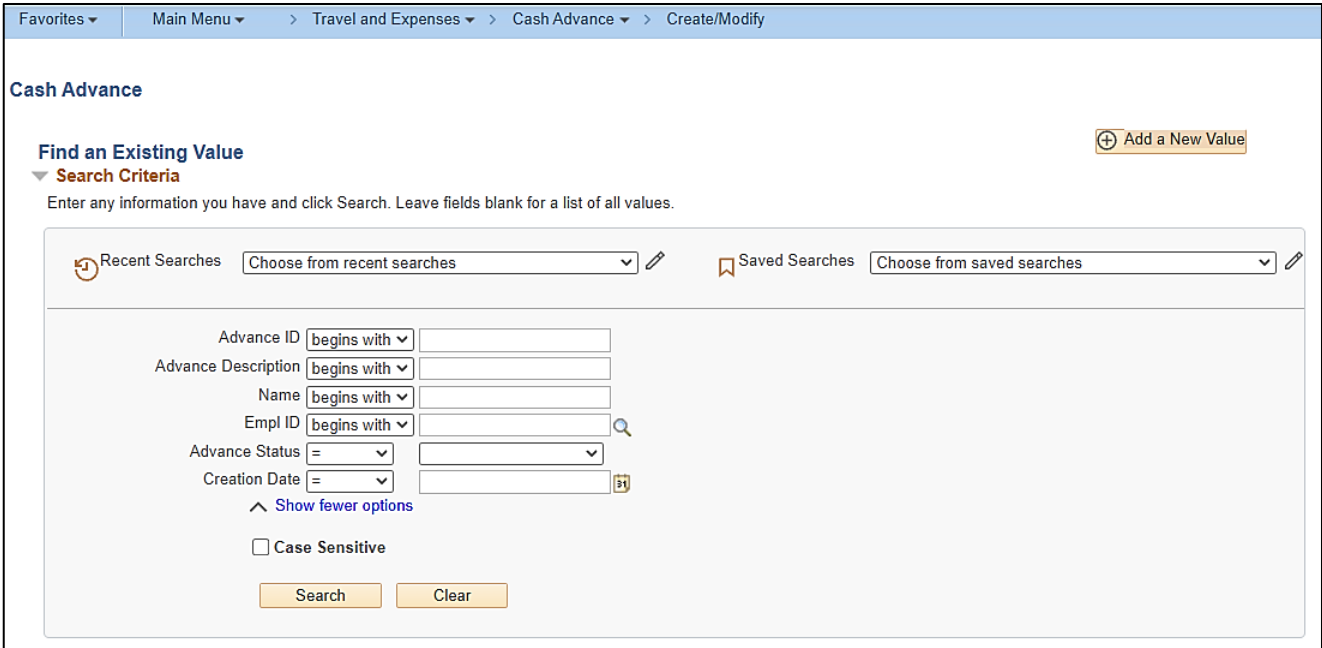
A Cash Advance cannot be updated if it has been:

- Approved

- Denied by the approver (denied Cash Advances must be deleted). An email is sent to the employee or the proxy who keyed the Cash Advance

Step	Action
1.	Navigate to the **Cash Advance** page using the following path: **Main Menu > Travel and Expenses > Cash Advances > Create/Modify**
	The **Cash Advance Add a New Value** page displays. Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Cash Advance ▾ > Create/Modify **Cash Advance** **Add a New Value** 🔍 Find an Existing Value *Empl ID [＿＿＿＿] 🔍 [Add]
ⓘ	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Click the **Find an Existing Value** button. [🔍 Find an Existing Value]

Step	Action
	The **Cash Advance Find an Existing Value Search** page displays. Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Cash Advance ▾ > Create/Modify **Cash Advance** **Find an Existing Value** ⊕ Add a New Value ▾ **Search Criteria** Enter any information you have and click Search. Leave fields blank for a list of all values. ⏱ Recent Searches [Choose from recent searches ▾] ✎ 🔖 Saved Searches [Choose from saved searches ▾] ✎ Advance ID [begins with ▾] [_____] Advance Description [begins with ▾] [_____] Name [begins with ▾] [_____] Empl ID [begins with ▾] [_____] 🔍 Advance Status [= ▾] [_____ ▾] Creation Date [= ▾] [_____] 📅 ⌃ Show fewer options ☐ **Case Sensitive** [Search] [Clear]
3.	Enter the applicable Cash Advance ID Number in the **Advance ID** field. Advance ID [begins with ▾] [_____]
ℹ	If the Cash Advance ID Number is not known, search using the other options by clicking the **Search by** dropdown button. The search options include "Advance Description", "Name", "Empl ID", "Advance Status", and "Creation Date". Users can only search for and update Cash Advances for employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the Job Aid titled **AP315_Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.
4.	Click the **Search** button. [Search] [Clear]

Step	Action
	The **Modify Cash Advance** page displays.
5.	Make any necessary changes to the Cash Advance (e.g., add or delete Lines, change amounts, etc.).
ℹ️	If modifying a Cash Advance that has been sent back by an approver, the user will see a **Sent Back for Revision** link that can be clicked to view the approver's comment.
ℹ️	Click the **Save for Later** link if the transaction is not ready to be routed for approval.
6.	When all updates are made, click the **Certification Statement** checkbox option.
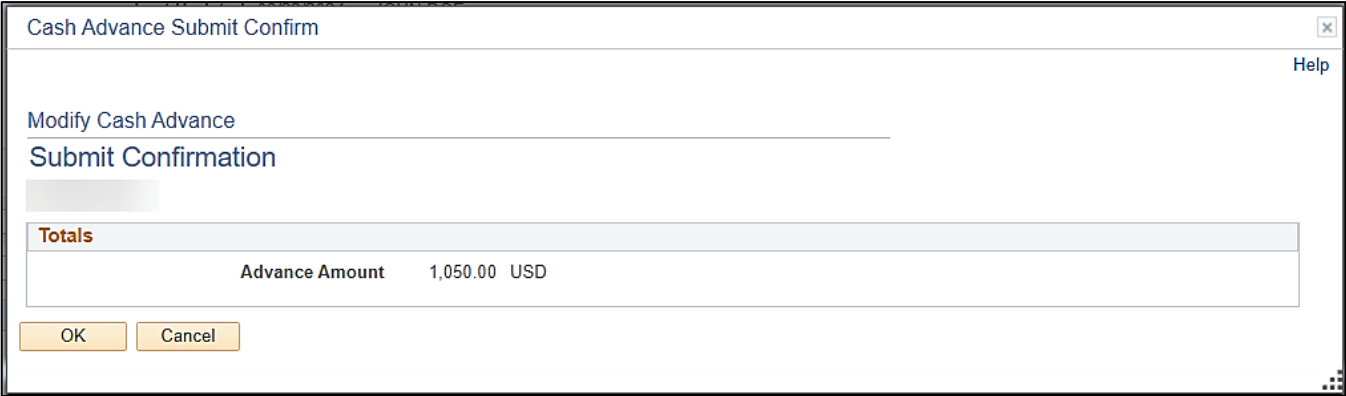
Step	Action
(i)	The **Submit Cash Advance** button is now enabled.
7.	Click the **Submit Cash Advance** button to send the updated Cash Advance through the approval workflow. Submit Cash Advance

The **Modify Cash Advance Submit Confirmation** page displays in a pop-up window.

Cash Advance Submit Confirm ☒

Help

Modify Cash Advance
Submit Confirmation

Totals

Advance Amount   1,050.00   USD

OK   Cancel

Step	Action
8.	Click the **OK** button to submit the cash advance for review and approval. OK Cancel
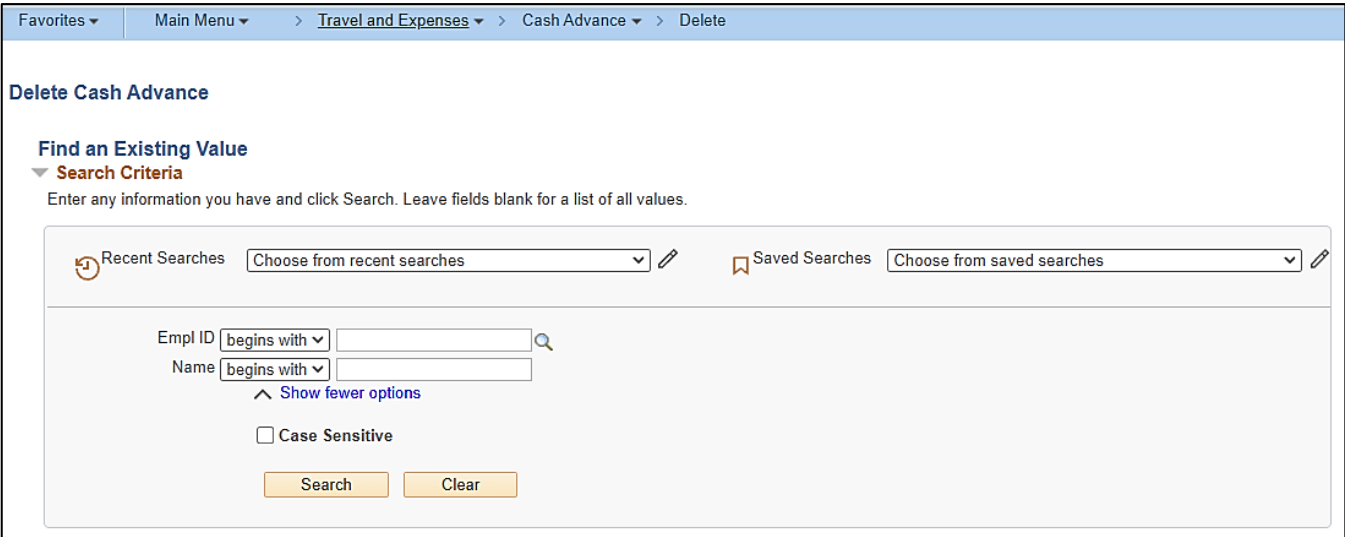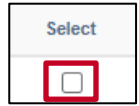
Deleting a Cash Advance

A Cash Advance request can be deleted if it has been:
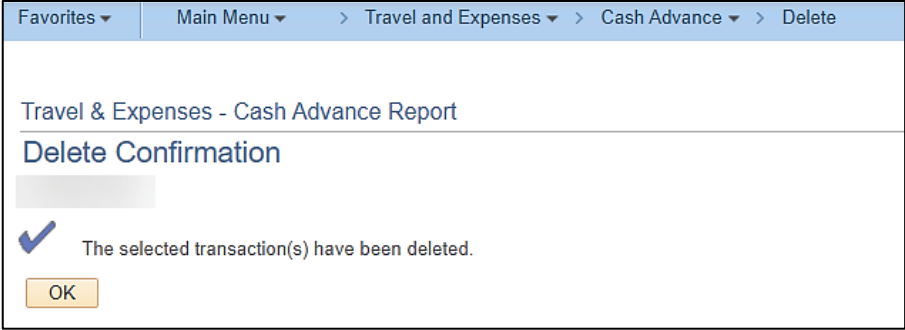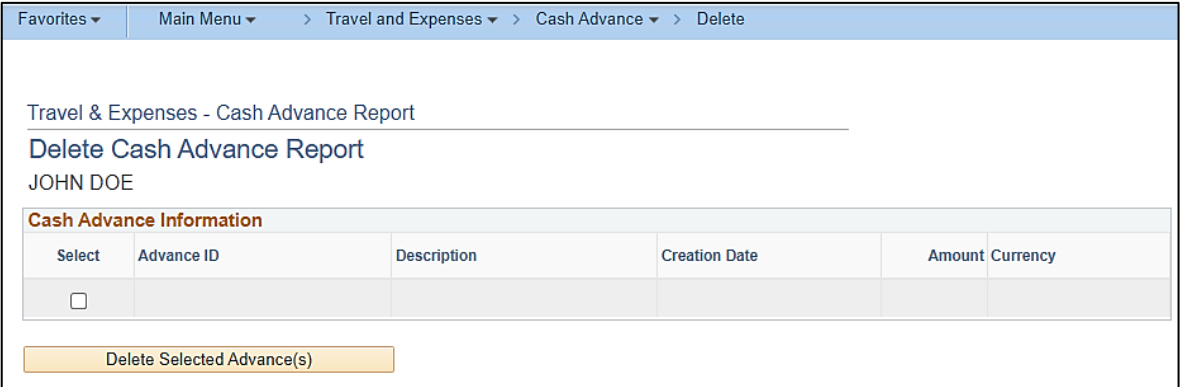
- Saved, but not submitted for approval
- Withdrawn from approval after submission
- Sent Back by the approver with a required comment. An email is sent to the employee or the proxy who keyed the Cash Advance
- Denied by the approver. An email is sent to the employee or the proxy who keyed the Cash Advance

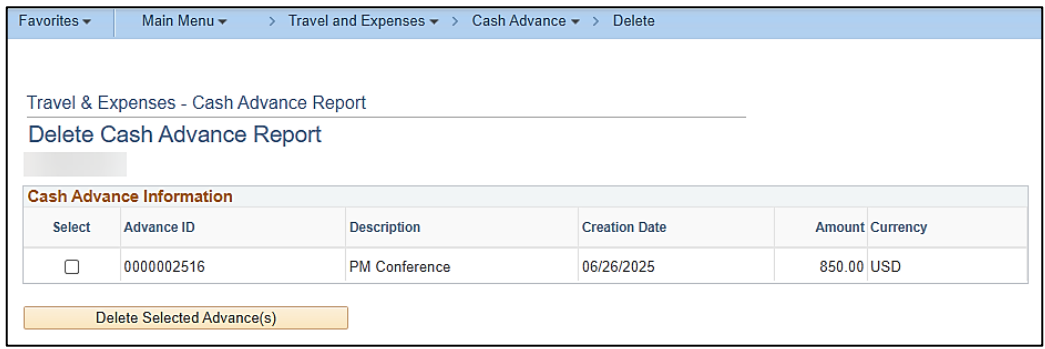| Step	Action
1.	Navigate to the **Delete Cash Advance** page using the following path: **Main Menu > Travel and Expenses > Cash Advances > Delete**
	The **Delete Cash Advance Find an Existing Value Search** page displays. Favorites ▼ Main Menu ▼ > Travel and Expenses ▼ > Cash Advance ▼ > Delete **Delete Cash Advance** **Find an Existing Value** ▼ **Search Criteria** Enter any information you have and click Search. Leave fields blank for a list of all values. 🕐 Recent Searches [Choose from recent searches ▼] ✏ 🔖 Saved Searches [Choose from saved searches ▼] ✏ Empl ID [begins with ▼] [_____] 🔍 Name [begins with ▼] [_____] ∧ Show fewer options ☐ Case Sensitive [Search] [Clear]
ℹ	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	The user's Employee ID defaults in the **Empl ID** field. Enter the applicable Employee ID or Name if deleting a Cash Advance for another employee. Empl ID [begins with ▼] [_____] 🔍

Step	Action
ℹ	Users can only search for and delete Cash Advances for employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the Job Aid titled **AP315_Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.
3.	Click the **Search** button.

The **Delete Cash Advance Report** page displays.

Step	Action
ℹ	All Cash Advances for the employee that are eligible for deletion will display in the **Cash Advance Information** section.
4.	Click the **Select** checkbox option for the Cash Advance that requires deletion.
5.	Click the **Delete Selected Advance(s)** button.

Step	Action
	A **Confirmation** message displays indicating that the selected transaction has been deleted. Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Cash Advance ▾ > Delete Travel & Expenses - Cash Advance Report **Delete Confirmation** ✔ The selected transaction(s) have been deleted. OK
6.	Click the **OK** button. OK
	The page refreshes and the deleted Cash Advance no longer displays in the **Cash Advance Information** section. Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Cash Advance ▾ > Delete Travel & Expenses - Cash Advance Report **Delete Cash Advance Report** JOHN DOE **Cash Advance Information** Select | Advance ID | Description | Creation Date | Amount | Currency ☐ Delete Selected Advance(s)
🛈	A deleted Cash Advance cannot be viewed. The deletion is permanent and cannot be undone.

Updating an Expense Report
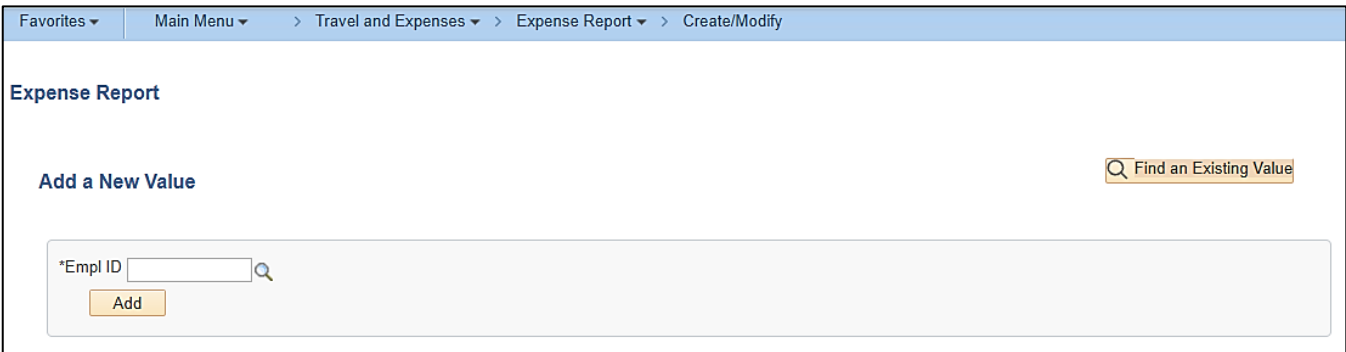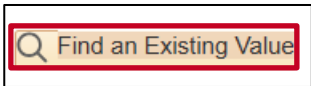
An Expense Report can be updated if it has been:

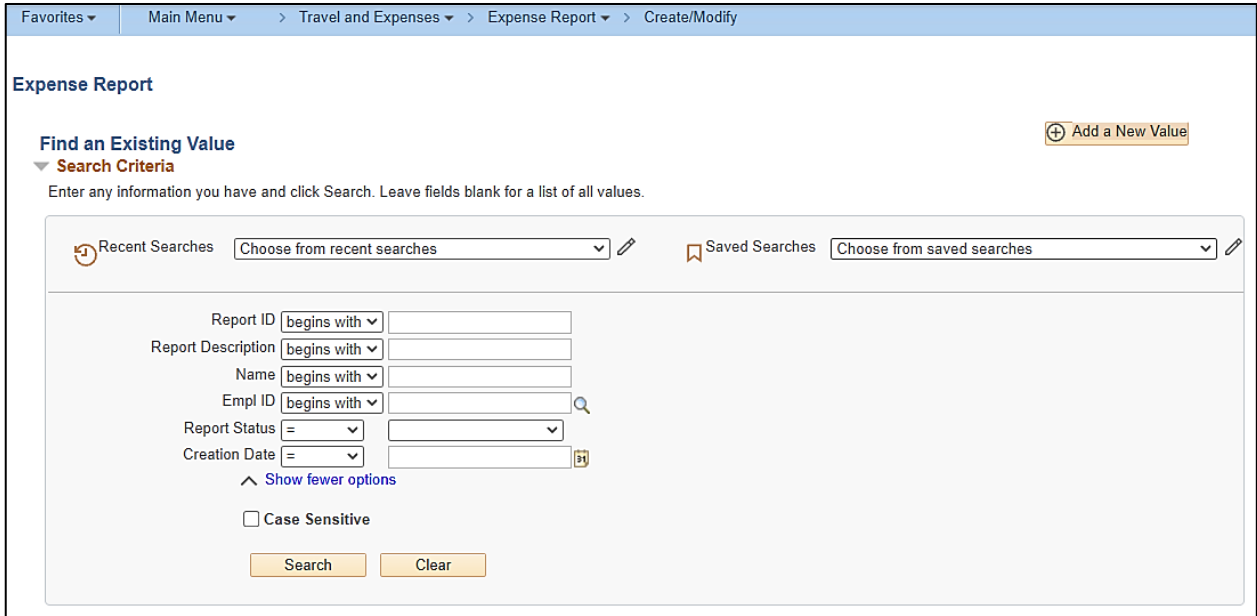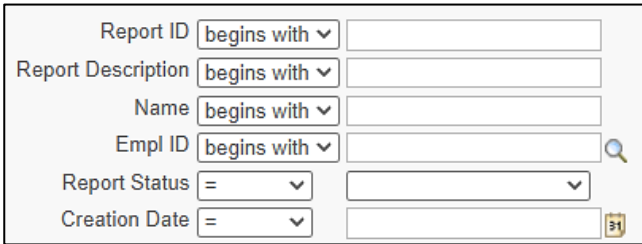- Saved, but not submitted for approval
- Withdrawn from approval after submission
- Sent back by the approver with a required comment. An email is sent to the employee or the proxy who keyed the Expense Report

An Expense Report cannot be updated if it has been:

- Approved
- Denied by the approver (denied Expense Reports must be deleted). An email is sent to the employee or the proxy who keyed the Expense Report

Step	Action
1.	Navigate to the **Expense Report** page using the following path: **Main Menu > Travel and Expenses > Expense Report > Create/Modify**
	The **Expense Report Add a New Value** page displays. Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Expense Report ▾ > Create/Modify **Expense Report** **Add a New Value** 🔍 Find an Existing Value *Empl ID [____] 🔍 Add
ℹ	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Click the **Find an Existing Value** button. 🔍 Find an Existing Value

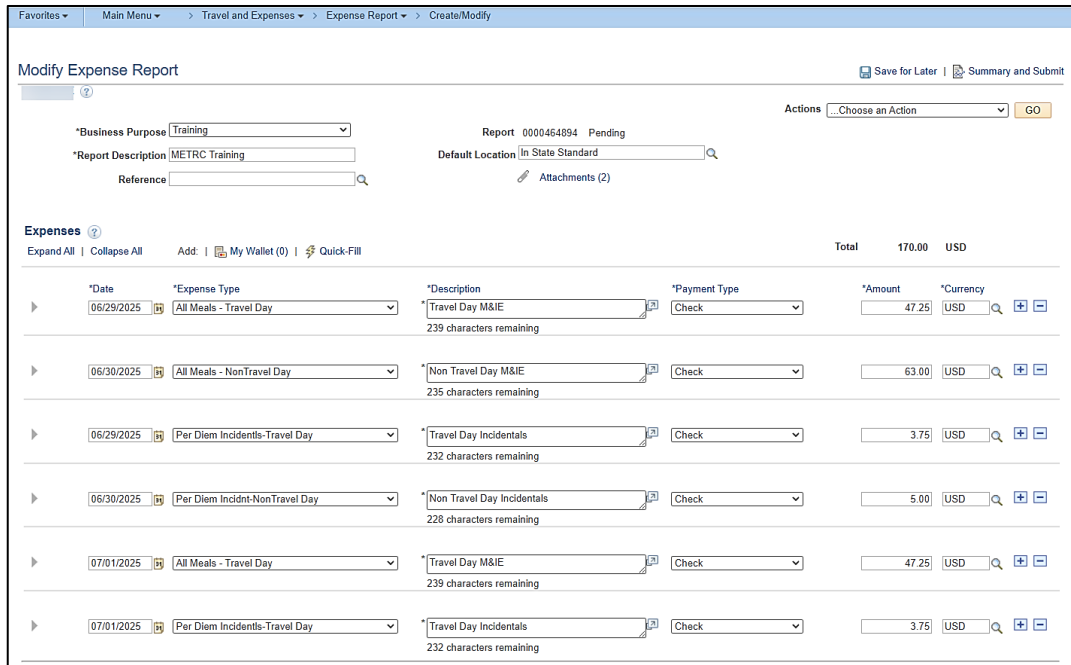| Step	Action
	The **Expense Report Find an Existing Value Search** page displays. ![Expense Report Find an Existing Value search page screenshot showing Favorites, Main Menu > Travel and Expenses > Expense Report > Create/Modify navigation. Expense Report heading with Find an Existing Value, Search Criteria. Fields: Report ID begins with, Report Description begins with, Name begins with, Empl ID begins with, Report Status =, Creation Date =. Case Sensitive checkbox, Search and Clear buttons, Add a New Value button.]
3.	Enter the applicable Expense Report ID Number in the **Report ID** field. ![Report ID field with begins with dropdown and empty text box highlighted in red]
ℹ	If the Expense Report ID Number is not known, search using the other options by clicking the **Search by** dropdown button. The other search options include "Report Description Name", "Empl ID", "Report Status", and "Creation Date". ![Search criteria fields: Report ID begins with, Report Description begins with, Name begins with, Empl ID begins with, Report Status =, Creation Date =]
4.	Click the **Search** button. ![Search button highlighted in red and Clear button]
ℹ	Users can only search for and update Expense Reports for employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the Job Aid titled **AP315_Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.

Step	Action
	The **Modify Expense Report** page displays.
5.	Make the required updates to the Expense Report. All Expense Lines are open for editing. Users can perform any action on the Expense Report that they could when creating it (e.g., add or delete Lines, change amounts, dates, locations, etc.).
ⓘ	If modifying an Expense Report that has been sent back by an approver, the user will see a **Sent Back for Revision** link that can be clicked to view the approver's comment. Sent Back For Revision
6.	Click the **Save for Later** link if the transaction is not ready to be routed for approval. Save for Later
7.	When ready to submit the Expense Report after making revisions, click the **Summary and Submit** link at the top of the page. Summary and Submit

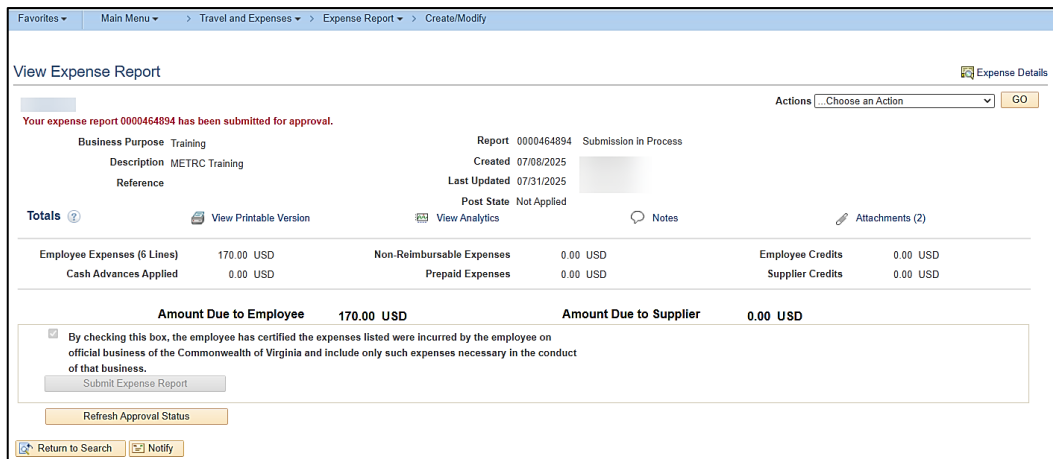| Step	Action
	The **Modify Expense Report Summary and Submit** page displays. ![Modify Expense Report screenshot showing Business Purpose Training, Description METRC Training, Report 0000464894 Pending, Created 07/08/2025, Last Updated 07/08/2025, Post State Not Applied. Totals: Employee Expenses (6 Lines) 170.00 USD, Cash Advances Applied 0.00 USD, Non-Reimbursable Expenses 0.00 USD, Prepaid Expenses 0.00 USD, Employee Credits 0.00 USD, Supplier Credits 0.00 USD. Amount Due to Employee 170.00 USD, Amount Due to Supplier 0.00 USD. Certification checkbox and Submit Expense Report button.]
8.	Click the **Certification Statement** checkbox option. ☐ By checking this box, the employee has certified the expenses listed were incurred by the employee on official business of the Commonwealth of Virginia and include only such expenses necessary in the conduct of that business.
ⓘ	The **Submit Expense Report** button is now enabled.
9.	Click the **Submit Expense Report** button to send the Expense Report through approval workflow. [Submit Expense Report]
	The **Expense Report Submit Confirmation** page displays in a pop-up window. ![Expense Report Submit Confirm pop-up showing Submit Confirmation. Totals: Employee Expenses (6 Lines) 170.00 USD, Cash Advances Applied 0.00 USD, Non-Reimbursable Expenses 0.00 USD, Prepaid Expenses 0.00 USD, Employee Credits 0.00 USD, Supplier Credits 0.00 USD. Amount Due to Employee 170.00 USD, Amount Due to Supplier 0.00 USD. OK and Cancel buttons.]

Step	Action
10.	Click the **OK** button to confirm that the updated Expense Report is submitted for approval. [OK] [Cancel]

| | The **View Expense Report** page displays.

 |

| ℹ | A message displays at the top of the page in red indicating that the Expense Report has been submitted for approval.

View Expense Report

Your expense report 0000464894 has been submitted for approval. |

| ℹ | Once the Expense Report has been submitted, users can only modify the Expense Report by clicking the **Withdraw Expense Report** button. For the steps to withdraw an Expense Report, see the Withdrawing Expense Transactions section of this Job Aid. |
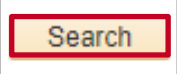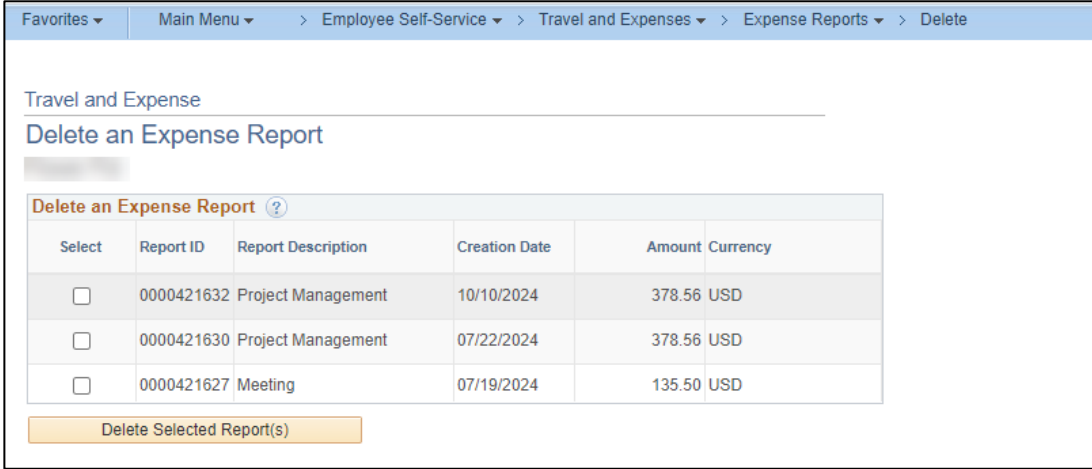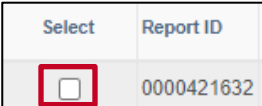
Deleting an Expense Report

Users can only delete an Expense Report if it has:
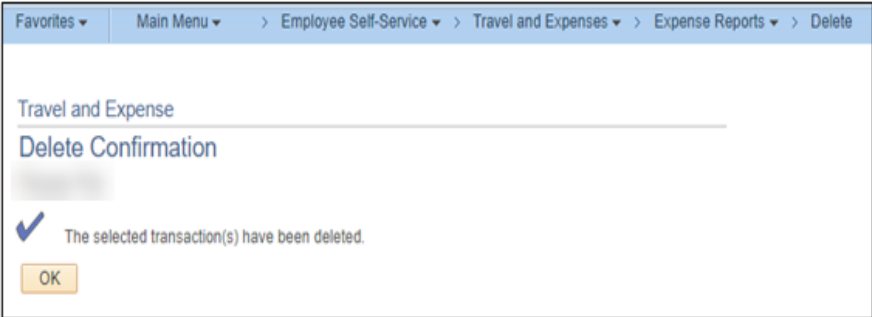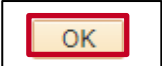
- Been saved, but not submitted for approval
- Withdrawn from Approval status
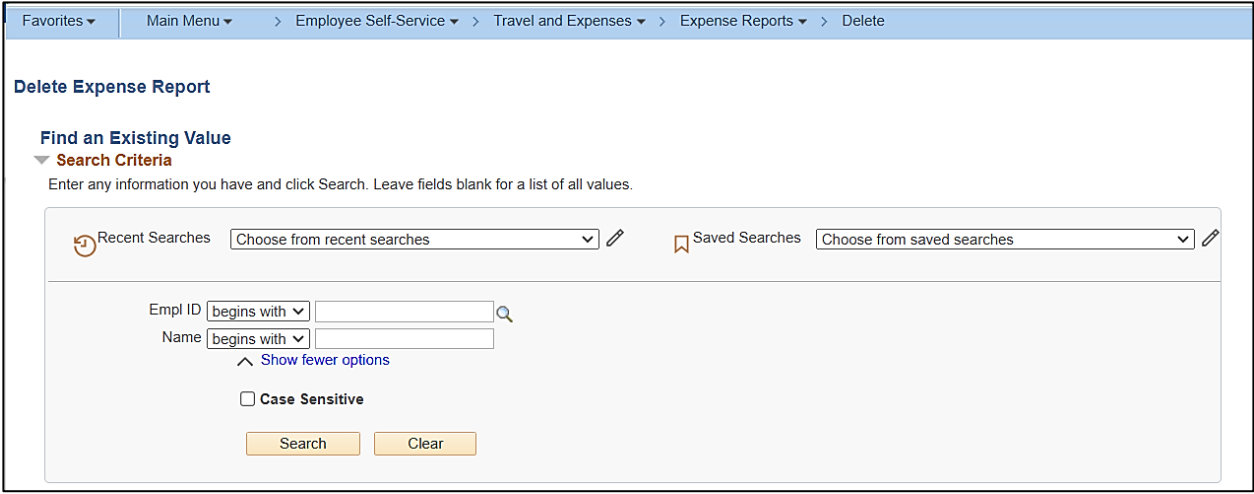- Been sent back by the approver with a required comment. An email is sent to the employee or the proxy who keyed the Expense Report
- No Cash Advance has been applied to it
- Been Denied by the approver (denied Expense Reports should be deleted in order to restore any associated Travel Authorization if applicable. Users can then use the restored Travel Authorization to create another Expense Report as needed). An email is sent to the employee or the proxy who keyed the Expense Report

Step	Action
1.	Navigate to the **Delete Expense Report** page using the following path: **Main Menu >Travel and Expenses > Expense Reports > Delete**
	The **Delete Expense Report Find an Existing Value Search** page displays.
ℹ	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	The user's Employee ID will default into the **Empl ID** field. Enter the applicable Employee ID or Name if deleting an Expense Report for another employee.

Step	Action
(i)	Users can only search for and delete Expense Reports for employees for whom they are a proxy with "Edit & Submit" authorization. For more detailed information about authorizing a proxy, see the Job Aid titled **AP315_Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.
3.	Click the **Search** button. Search
	The **Delete an Expense Report** page displays. Favorites ▾ Main Menu ▾ > Employee Self-Service ▾ > Travel and Expenses ▾ > Expense Reports ▾ > Delete Travel and Expense Delete an Expense Report **Delete an Expense Report** ⑦ <table><tr><th>Select</th><th>Report ID</th><th>Report Description</th><th>Creation Date</th><th>Amount</th><th>Currency</th></tr><tr><td>☐</td><td>0000421632</td><td>Project Management</td><td>10/10/2024</td><td>378.56</td><td>USD</td></tr><tr><td>☐</td><td>0000421630</td><td>Project Management</td><td>07/22/2024</td><td>378.56</td><td>USD</td></tr><tr><td>☐</td><td>0000421627</td><td>Meeting</td><td>07/19/2024</td><td>135.50</td><td>USD</td></tr></table> Delete Selected Report(s)
(i)	All Expense Reports for the employee that are eligible for deletion will display in the **Delete an Expense Report** section.
4.	Click the **Select** checkbox option for the Expense Report that requires deletion. <table><tr><th>Select</th><th>Report ID</th></tr><tr><td>☐</td><td>0000421632</td></tr></table>
5.	Click the **Delete Selected Report(s)** button. Delete Selected Report(s)

Step	Action
	A **Confirmation** message displays indicating that the selected transaction has been deleted. Favorites ▾ Main Menu ▾ › Employee Self-Service ▾ › Travel and Expenses ▾ › Expense Reports ▾ › Delete Travel and Expense Delete Confirmation ✔ The selected transaction(s) have been deleted. OK
6.	Click the **OK** button. OK
ℹ	A deleted Expense Report cannot be viewed. The deletion action is permanent and cannot be undone.

Accounts Payable Job Aid
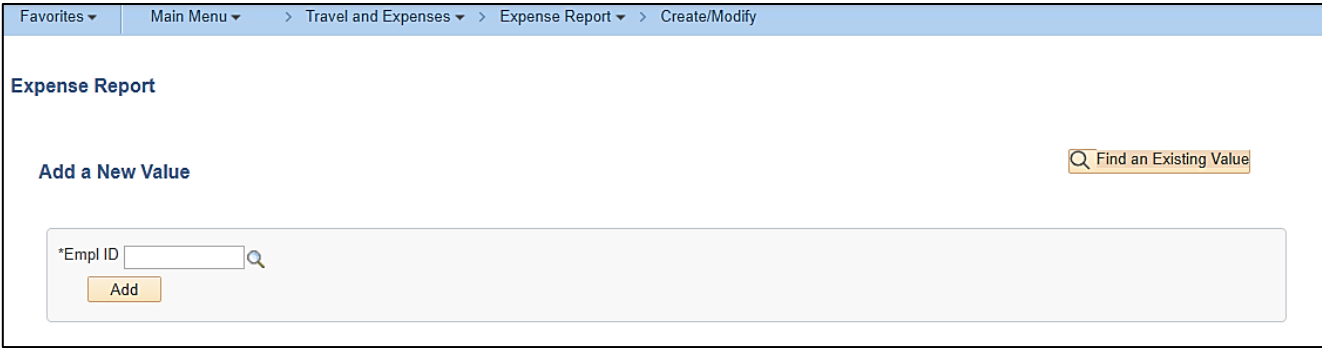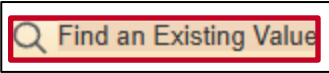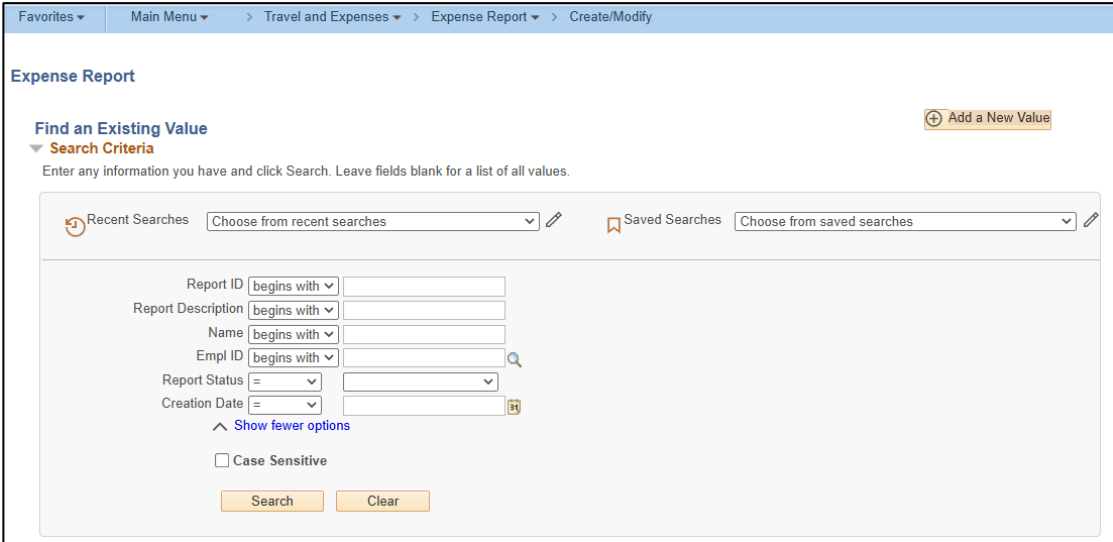
AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

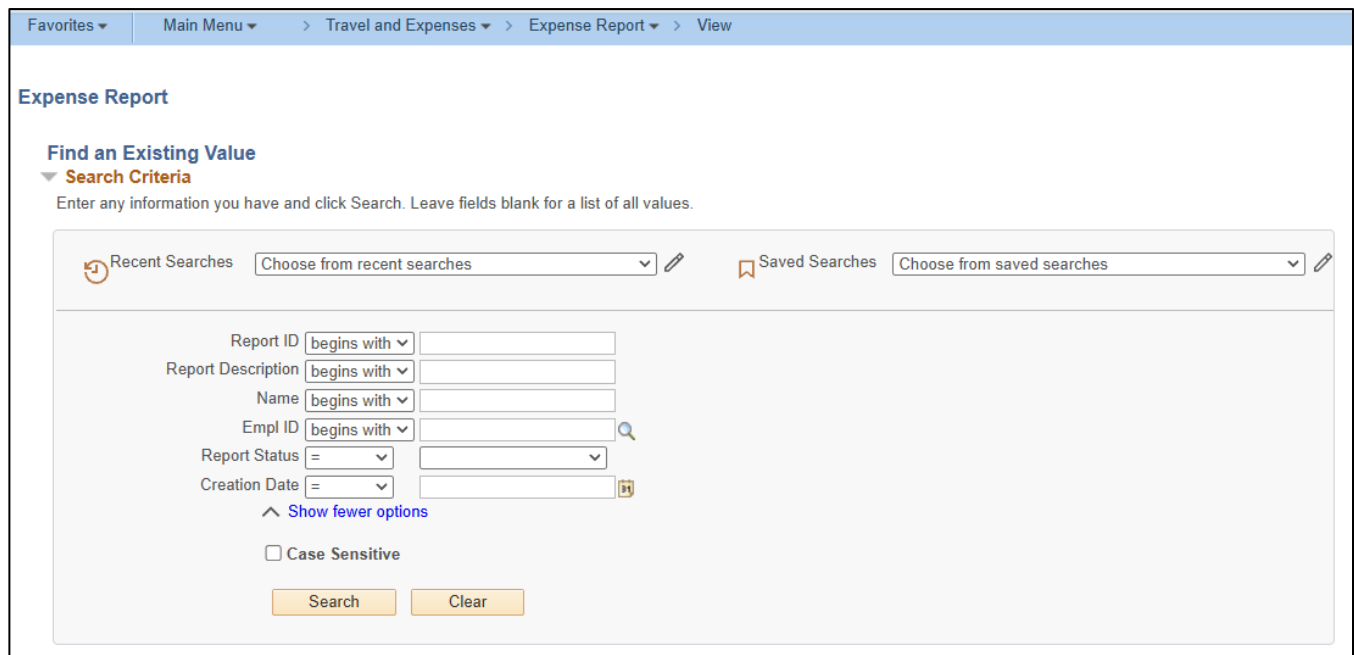## Withdrawing Expense Transactions

After an expense transaction has been submitted, it can be withdrawn so that additional updates can be made. Expense transactions can only be withdrawn if the approver has <u>not</u> taken action on the transaction. Once an approver takes action on the transaction, the only way it can be updated is if it is sent back by the approver.

This section of the Job Aid will walk through the steps for withdrawing, updating, and resubmitting an expense transaction. This process is demonstrated using an Expense Report but is also applicable for Travel Authorizations and Cash Advances. For those transactions, replace "Expense Report" in the navigation path noted with "Travel Authorization" or "Cash Advance" as applicable.

Step	Action
1.	Navigate to the **View** page using the following path: **Main Menu > Travel and Expenses > Expense Report > View**
The **Expense Report Find an Existing Value Search** page displays.		

ℹ	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

Step	Action
2.	Enter the applicable Expense Report ID Number in the **Report ID** field. Report ID [begins with ⌄] [ ]
3.	Click the **Search** button. [Search] [Clear]
	The **View Expense Report** page displays.
4.	Click the **Withdraw Expense Report** button. [Submit Expense Report] [Withdraw Expense Report]
ℹ	The **Withdraw Expense Report** button will not be enabled if the approver has taken action.

Step	Action
	The page refreshes.
![info icon]	A message displays at the top of the page indicating that the Expense Report has been withdrawn from the approver's queue. Your expense report 0000464894 has been withdrawn from the approver's queue.
5.	Click the **Expense Report** dropdown button in the breadcrumbs at the top of the page.
6.	Click the **Create/Modify** list item.
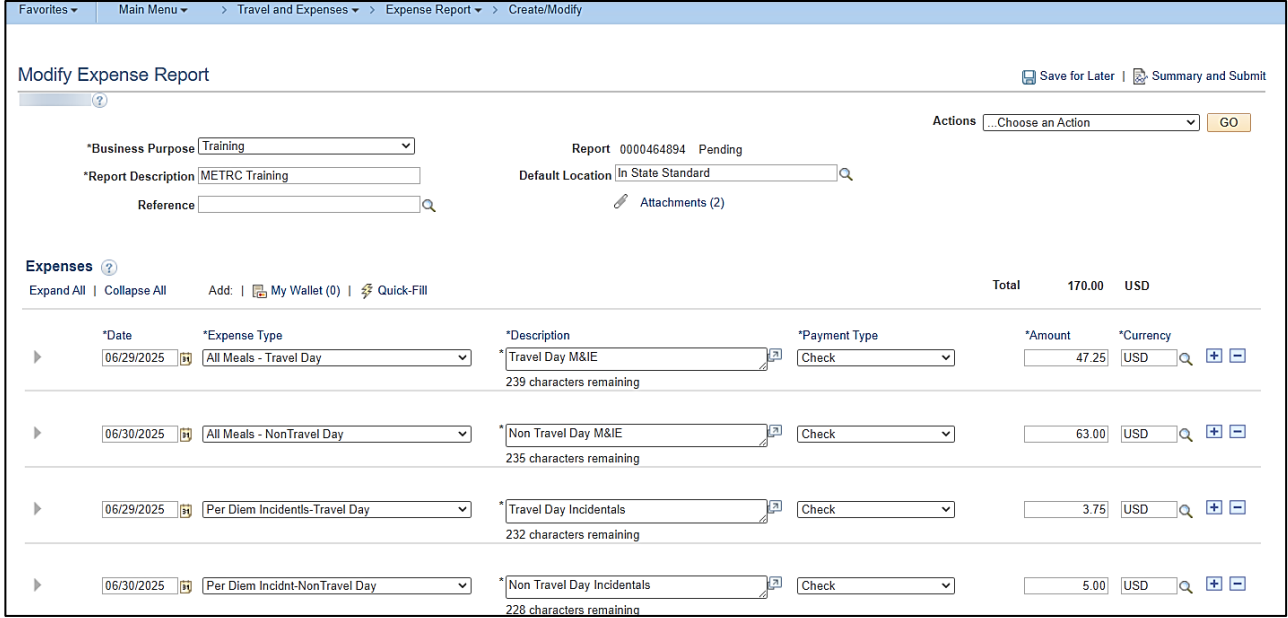
Step	Action
	The **Expense Report Add a New Value** page displays. Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Expense Report ▾ > Create/Modify **Expense Report** **Add a New Value** 🔍 Find an Existing Value *Empl ID _____ 🔍 Add
7.	Click the **Find an Existing Value** button. 🔍 Find an Existing Value
	The **Expense Report Find an Existing Value Search** page displays. Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Expense Report ▾ > Create/Modify **Expense Report** **Find an Existing Value** ⊕ Add a New Value ▼ **Search Criteria** Enter any information you have and click Search. Leave fields blank for a list of all values. ⟳ Recent Searches [Choose from recent searches ▾] ✎ 🔖 Saved Searches [Choose from saved searches ▾] ✎ Report ID [begins with ▾] [_____] Report Description [begins with ▾] [_____] Name [begins with ▾] [_____] Empl ID [begins with ▾] [_____] 🔍 Report Status [= ▾] [_____ ▾] Creation Date [= ▾] [_____] 📅 ⌃ Show fewer options ☐ Case Sensitive [Search] [Clear]
8.	Enter the applicable Expense Report ID Number in the **Report ID** field. Report ID [begins with ▾] [_____]
9.	Click the **Search** button. [Search] [Clear]
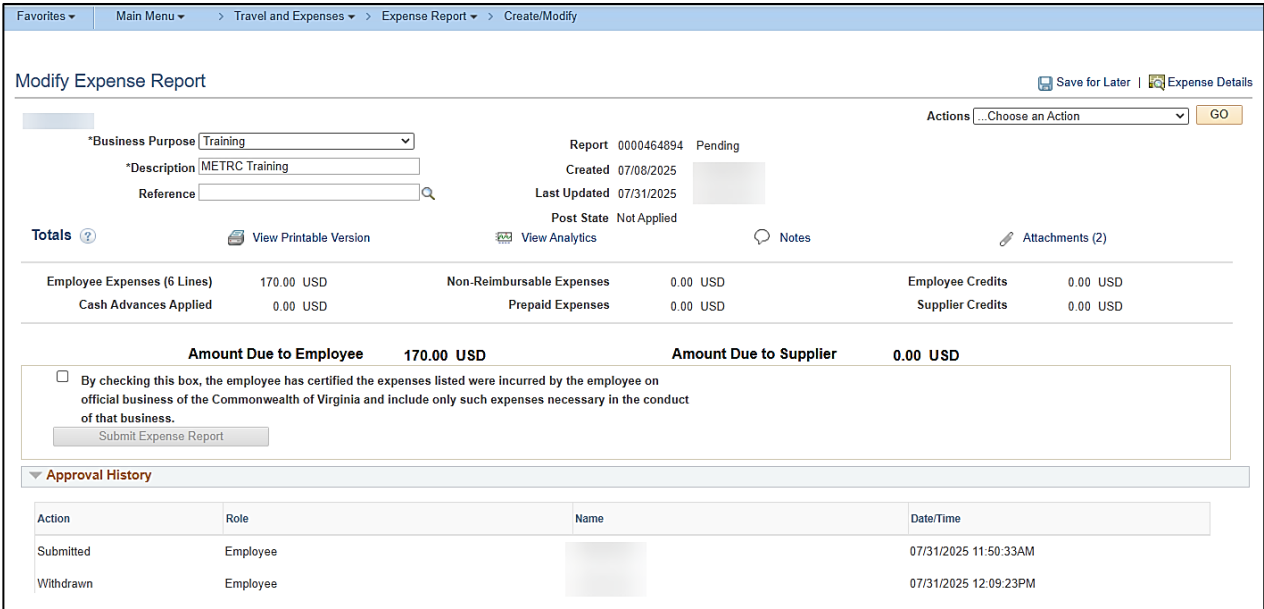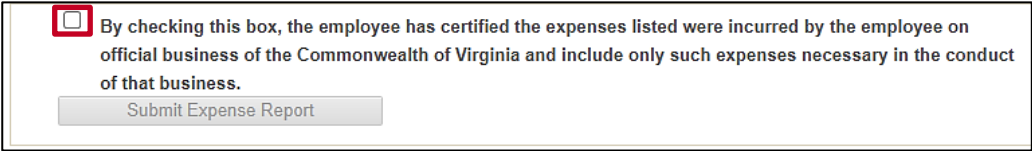
Step	Action
	The **Modify Expense Report** page displays.

| 10. | Make the necessary updates. |
| 11. | Click the **Summary and Submit** link at the top of the page. |
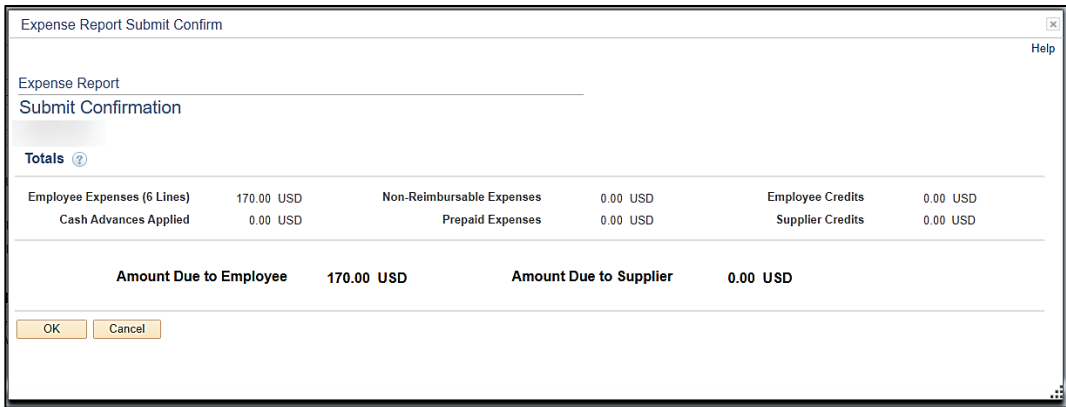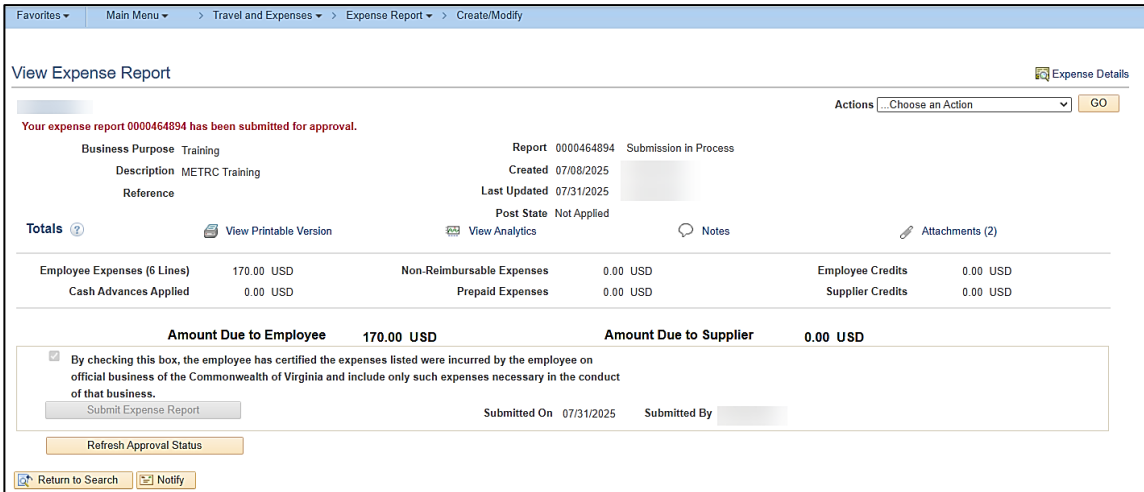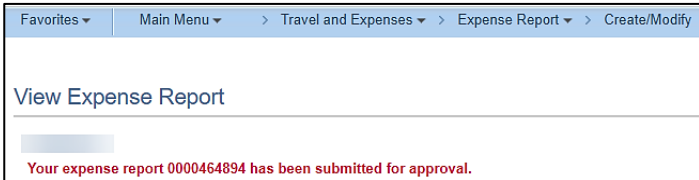
Step	Action
	The **Modify Expense Report Summary and Submit** page displays.
ⓘ	The **Approval History** section shows the actions that have been taken on this expense transaction. Notice that the withdrawal is recorded here.
12.	Click the **Certification Statement** checkbox option.
ⓘ	The **Submit Expense Report** button is now enabled.
13.	Click the **Submit Expense Report** button.

Step	Action
	The **Expense Report Submit Confirmation** page displays in a pop-up window. Expense Report Submit Confirm Help Expense Report Submit Confirmation **Totals** ? Employee Expenses (6 Lines) 170.00 USD Non-Reimbursable Expenses 0.00 USD Employee Credits 0.00 USD Cash Advances Applied 0.00 USD Prepaid Expenses 0.00 USD Supplier Credits 0.00 USD **Amount Due to Employee** 170.00 USD **Amount Due to Supplier** 0.00 USD [OK] [Cancel]
14.	Click the **OK** button. [**OK**] [Cancel]
	The **View Expense Report** page displays. Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Expense Report ▾ > Create/Modify **View Expense Report** 🔍 Expense Details Actions [...Choose an Action] [GO] *Your expense report 0000464894 has been submitted for approval.* Business Purpose Training Report 0000464894 Submission in Process Description METRC Training Created 07/08/2025 Reference Last Updated 07/31/2025 Post State Not Applied **Totals** ? 🖨 View Printable Version 📊 View Analytics 💬 Notes 📎 Attachments (2) Employee Expenses (6 Lines) 170.00 USD Non-Reimbursable Expenses 0.00 USD Employee Credits 0.00 USD Cash Advances Applied 0.00 USD Prepaid Expenses 0.00 USD Supplier Credits 0.00 USD **Amount Due to Employee** 170.00 USD **Amount Due to Supplier** 0.00 USD ☑ By checking this box, the employee has certified the expenses listed were incurred by the employee on official business of the Commonwealth of Virginia and include only such expenses necessary in the conduct of that business. [Submit Expense Report] Submitted On 07/31/2025 Submitted By [Refresh Approval Status] 🔙 Return to Search 📧 Notify
15.	A message displays in red at the top of the page indicating that the Expense Report has been submitted for approval. Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Expense Report ▾ > Create/Modify **View Expense Report** *Your expense report 0000464894 has been submitted for approval.*

Step	Action
ℹ	The **Refresh Approval Status** button can be clicked to view all of the actions for the Expense Report as well as the approval routing.