

How to make an Employee Expense Claim

From your Max homepage, click on the 'Request a Service' link on the top toolbar. This will take you to the full service menu, where you can find the 'Employee Expense Claim' service.

Making an Employee Expense Claim

Once the Employee Expense Claim form is submitted, it will go to the Manager [Budget Holder] selected for approval and then to Finance for review. If approved, Payroll will then process it in the next cycle.

Tips:

- If you don't have all of the information to complete the form, you can save it to your Max homepage. It will stay on your homepage as a 'Draft' under 'Open items'.
- If you don't know your 'Cost Centre', use the link at the top of the form to see a full list.

Filling out the form

To make an Employee Expense Claim, follow the steps below. Each step corresponds to the numbered bullet on the form on page 2 of this guide.

1. Select '**Employee Name**' [click the '**I**' to check the details and ensure you have selected the right person]
2. Type in a '**Reference**' [13 characters max.] so that you can easily identify and track your claim through the email notifications
3. Select the '**Cost Centre**' from the dropdown list [you can start typing to bring up the number easily]
4. Fill in the table with as much information as you can:
 - Type in the '**Reason**' for the expense [what and why]
 - Type in the '**Date**' of the invoice you're claiming for [dd/mm/yyyy]
 - Type in the '**Expense**' code [4 digits], '**Analysis**' code [5 digits], '**Project**' code [if you are charging to a project]
 - Type in the '**Gross**', '**GST**', '**Net**'
 - Select the '**Currency**' from dropdown list if you incurred these expenses overseas
5. If you need to add more than two expenses, click '**Add Row**' and repeat the above steps
The table will automatically calculate the total claimed
6. **Attach proof** of your expense claim[s] eg. receipts, invoices by clicking on the paperclip to upload your files
7. Confirm you've attached copies of all tax invoices and proof of payment, and that you'll keep all original paperwork and make it available if requested by clicking on the check boxes
8. Select the '**Manager**' for approval of your expense claim[s]
9. Click on '**Submit!**'
[Note: You can click 'Save' and come back to it later. It will stay on your homepage as a 'Draft' under 'Open items']

How to make an Employee Expense Claim

Your Employee Expense Claim form looks like this. See page 1 for a step by step guide to filling it out.

[Click here to go back](#)



Employee Expense Claim

Complete this form to claim CDHB | WCDHB business related expenses.

Once the Employee Expense Claim form is submitted, it will go to the Budget Holder selected for approval and then to Finance for review. If approved, Payroll will then process it in your next cycle.

You are required to attach clear copies of all original tax invoices and proof of payment, and keep all original paperwork and make it available if requested.

If you don't know your Cost Centre, you can find a full list of [CDHB Cost Centres](#) or [WCDHB Cost Centres](#). If you have any questions, please contact your Divisional Finance team.

1

* Employee Name (Claimant's Name)

2

Reference

3

* Cost Centre

[\[Numeric or Text reference to help you identify this claim\]](#)

4

* Expense Lines

Reason	Date dd/mm/yyyy	Expense	Analysis	Project	Gross	GST	Net	Currency
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00 ✓	0.00 ✓	0.00 ✓	NZD\$ ▼

5

Add Row

Total claimed	Gross (Sum)	GST (Sum)	Net (Sum)
This is a notional total which may be subject to change.	0.00	0.00	0.00

7

Confirmation

☐ I confirm I have attached copies of all original tax invoices and proof of payment

☐ I agree in submitting this form I will keep all original paperwork until I have been reimbursed and will make it available if requested

* Select Manager (Budget Holder) to Approve

8

9

Submit

Save

6



Add attachments

Required Information: [Employee Name \(Claimant's Name\)](#) [Cost Centre](#) [I confirm I have attached copies of all original tax invoices and proof of payment](#)
[I agree in submitting this form I will keep all original paperwork until I have been reimbursed and will make it available if requested](#)
[Select Manager \(Budget Holder\) to Approve](#)