



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- When an expense transaction has been submitted, it must be withdrawn by navigating to the corresponding **View** page for the applicable transaction first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	2
Updating a Travel Authorization	3
Canceling a Travel Authorization	8
Deleting a Travel Authorization	10
Updating a Cash Advance	13
Deleting a Cash Advance.....	17
Updating an Expense Report.....	20
Deleting an Expense Report	25
Withdrawing Expense Transactions	28



Accounts Payable Job Aid

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

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:

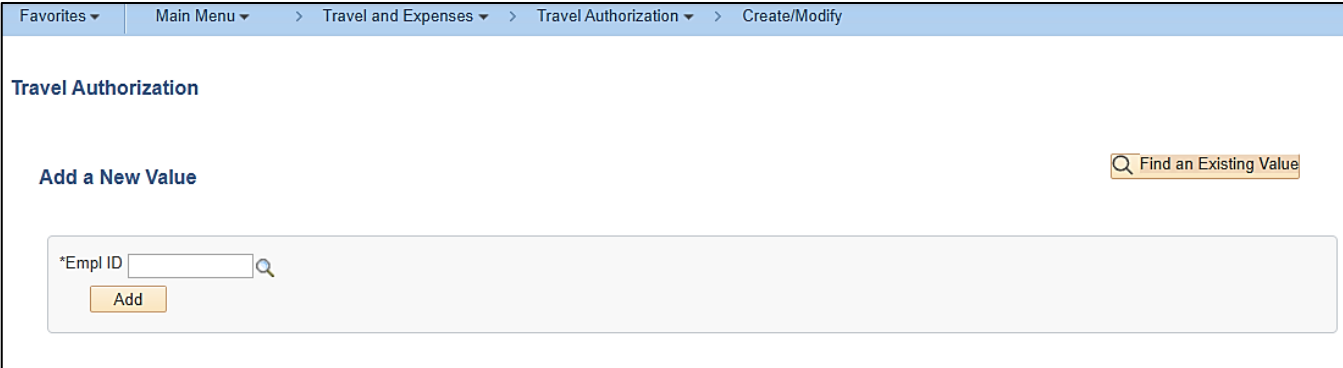

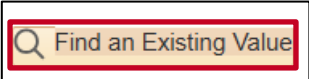
- Saved, but not submitted for approvals
- Withdrawn from approvals after submission
- Sent back by the approver with a required comment. An email is sent to the employee or the proxy who keyed the Travel Authorization

A Travel Authorization cannot be updated if it has been:

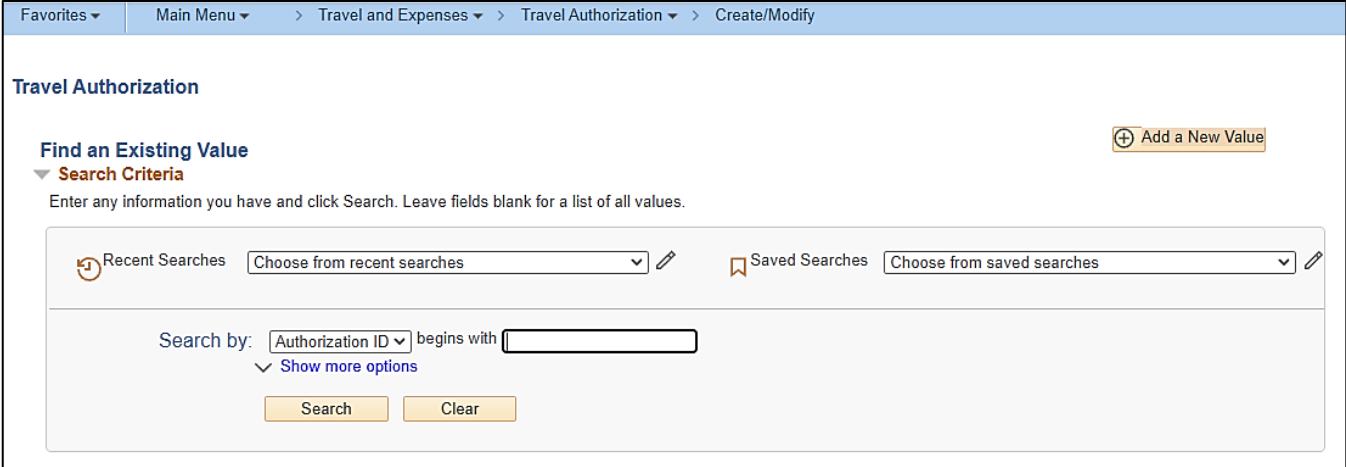
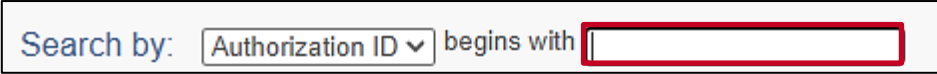



- Approved
- Denied by the approver (denied Travel Authorizations must be deleted). An email is sent to the employee or proxy who keyed the Travel Authorization

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
<p>The Travel Authorization Add a New Value page displays.</p> 	
	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. 

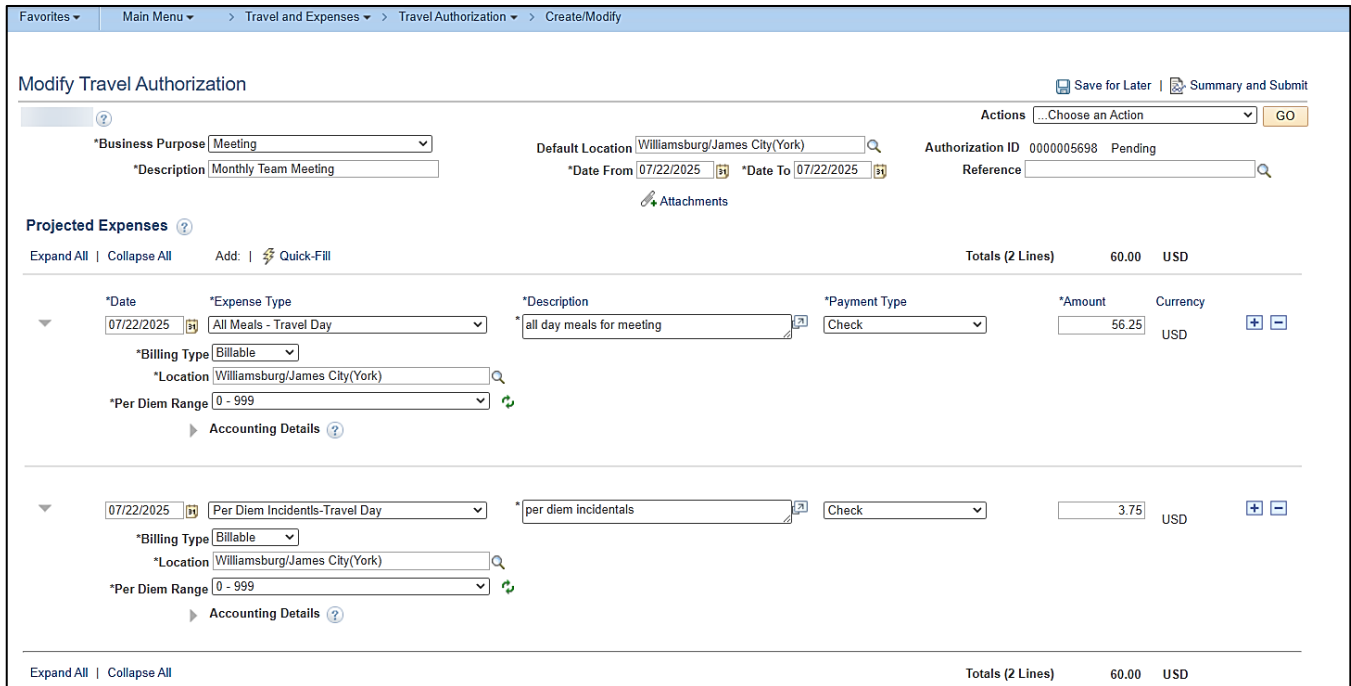
AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
	<p>The Travel Authorization Find an Existing Value Search page displays.</p> 
3.	<p>Enter the applicable Travel Authorization ID Number in the Search by field.</p> 
	<p>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”.</p>
4.	<p>Click the Search button.</p> 
	<p>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.</p>

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
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The **Modify Travel Authorization** page displays.



- Make the applicable updates to the Travel Authorization (e.g. add or delete Lines, change amounts, dates, locations, etc.).



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

- Click the **Summary and Submit** link at the top of the page after completing all revisions.

Summary and Submit

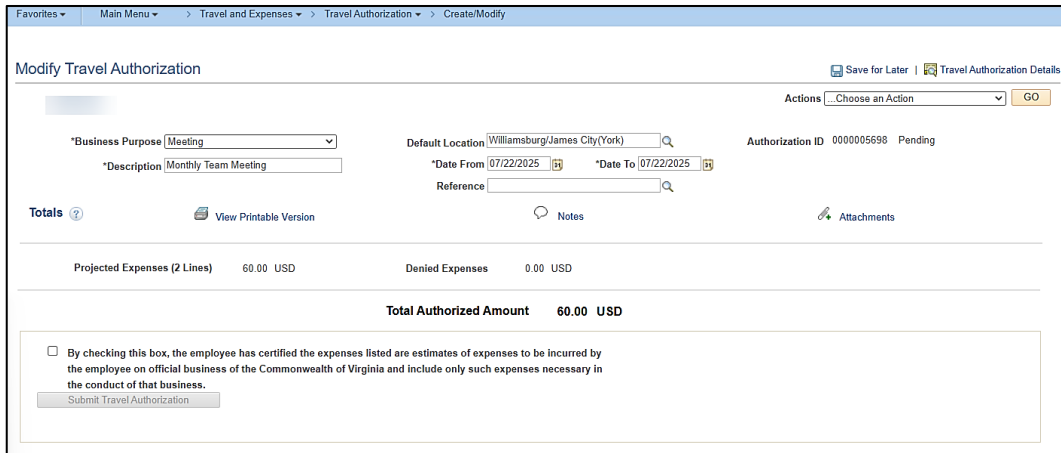


Click the **Save for Later** link if the transaction is not ready to submit for approval.

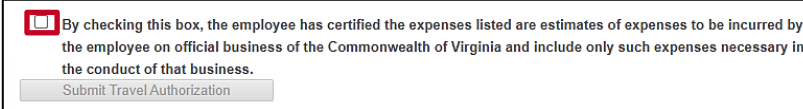
AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
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The **Modify Travel Authorization Summary and Submit** page displays.

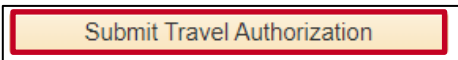


7. Click the **Certification Statement** checkbox option when the transaction is ready to be submitted.




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.





Accounts Payable Job Aid

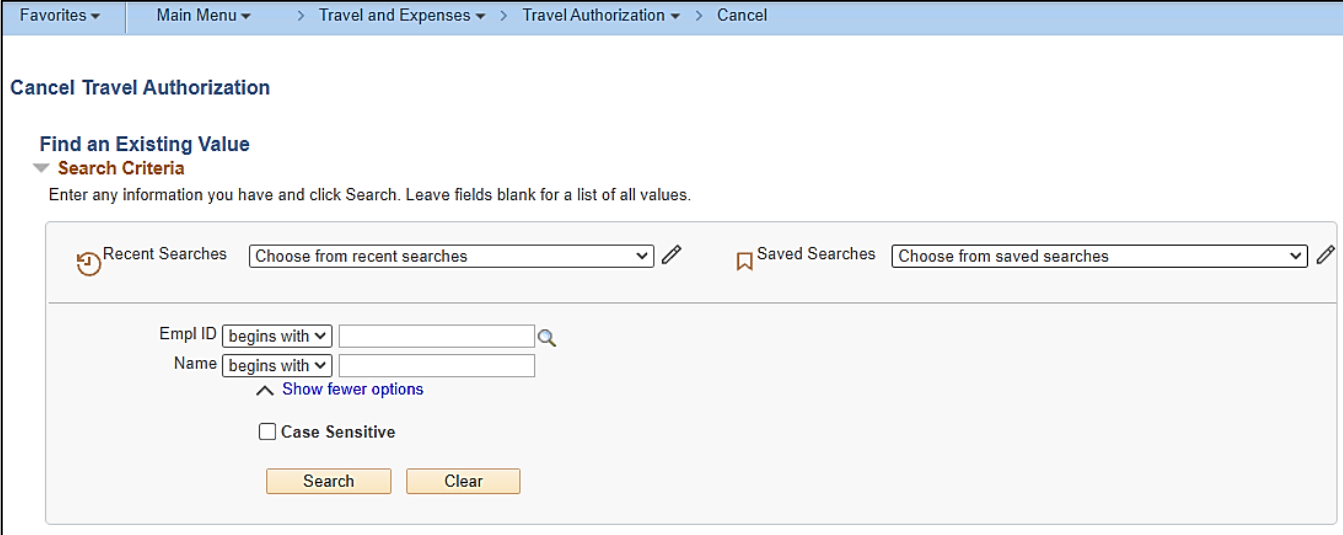


AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
9.	Click the OK button to confirm the submission.  A screenshot of a dialog box showing two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red rectangular border.



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
<p>The Cancel Travel Authorization Find an Existing Value Search page displays.</p> 	
	<p>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.</p>
2.	<p>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.</p> <p>Note: Users can only search for and cancel Travel Authorizations for employees for whom they are a proxy.</p> 

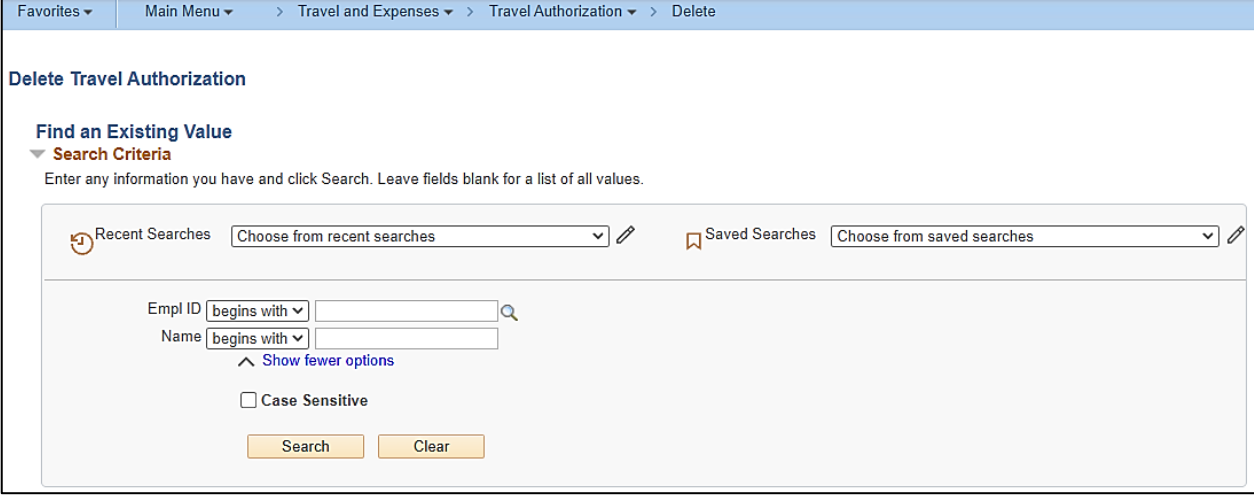


AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action														
3.	Click the Search button. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="border: 1px solid #ccc; display: inline-block; padding: 2px 10px;">Search</div> <div style="border: 1px solid #ccc; display: inline-block; padding: 2px 10px; margin-left: 10px;">Clear</div> </div>														
	The Cancel Approved Travel Authorization page displays. <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Travel Authorization ▾ > Cancel </div> <div style="padding-top: 10px;"> <p>Travel and Expense</p> <p>Cancel Approved Travel Authorization</p> <hr/> <p>Travel Authorization Information</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <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> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td>FHWA Relocation Workshop</td> <td>0000003941</td> <td>06/23/2025</td> <td>06/27/2025</td> <td style="text-align: right;">605.88</td> <td>USD</td> </tr> </tbody> </table> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; text-align: center;"> Cancel Selected Travel Authorization(s) </div> </div> </div>	Select	Description	Authorization ID	Date From	Date To	Amount	Currency	<input type="checkbox"/>	FHWA Relocation Workshop	0000003941	06/23/2025	06/27/2025	605.88	USD
Select	Description	Authorization ID	Date From	Date To	Amount	Currency									
<input type="checkbox"/>	FHWA Relocation Workshop	0000003941	06/23/2025	06/27/2025	605.88	USD									
	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. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 2px;">Select</div> <div style="padding: 2px 0;"> <input style="border: 1px solid #ccc;" type="checkbox"/> </div> </div>														
5.	Click the Cancel Selected Travel Authorization(s) button. <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <div style="border: 1px solid #ccc; display: inline-block; padding: 2px 10px;"> Cancel Selected Travel Authorization(s) </div> </div>														
	The cancel action is saved on the Travel Authorization.														



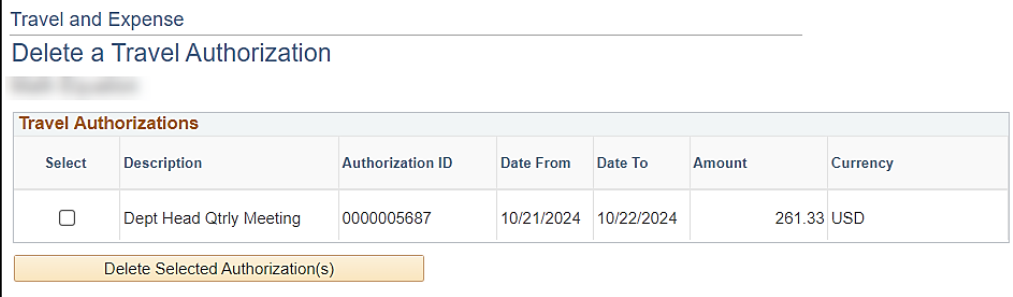



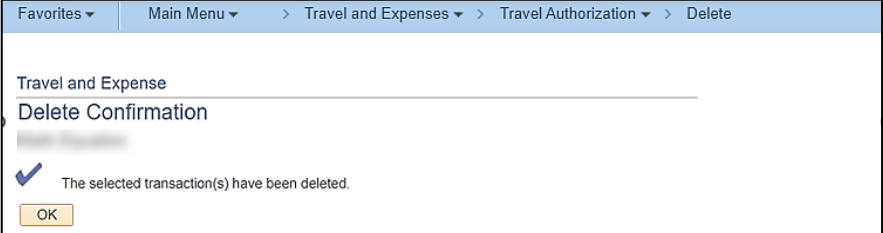
Deleting a Travel Authorization

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.	
	
	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. 

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
	<p>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.</p>
3.	<p>Click the Search button.</p> 
<p>The Delete a Travel Authorization page displays.</p> 	
	<p>All Travel Authorizations for the employee that are eligible for deletion display in the Travel Authorizations section.</p>
4.	<p>Click the Select checkbox for the Travel Authorization that requires deletion.</p> 
5.	<p>Click the Delete Selected Authorization(s) button.</p> 
<p>A Confirmation message displays indicating that the selected transaction has been deleted.</p> 	

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

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

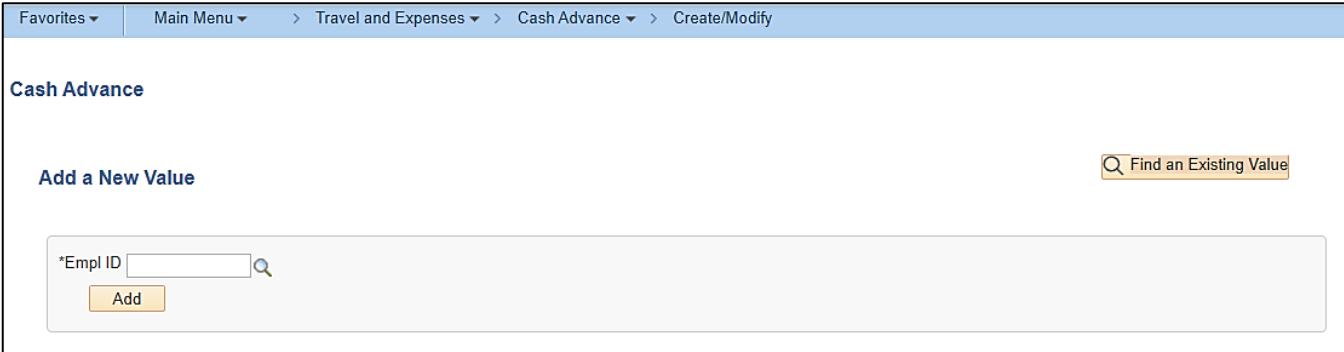


Updating a Cash Advance

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

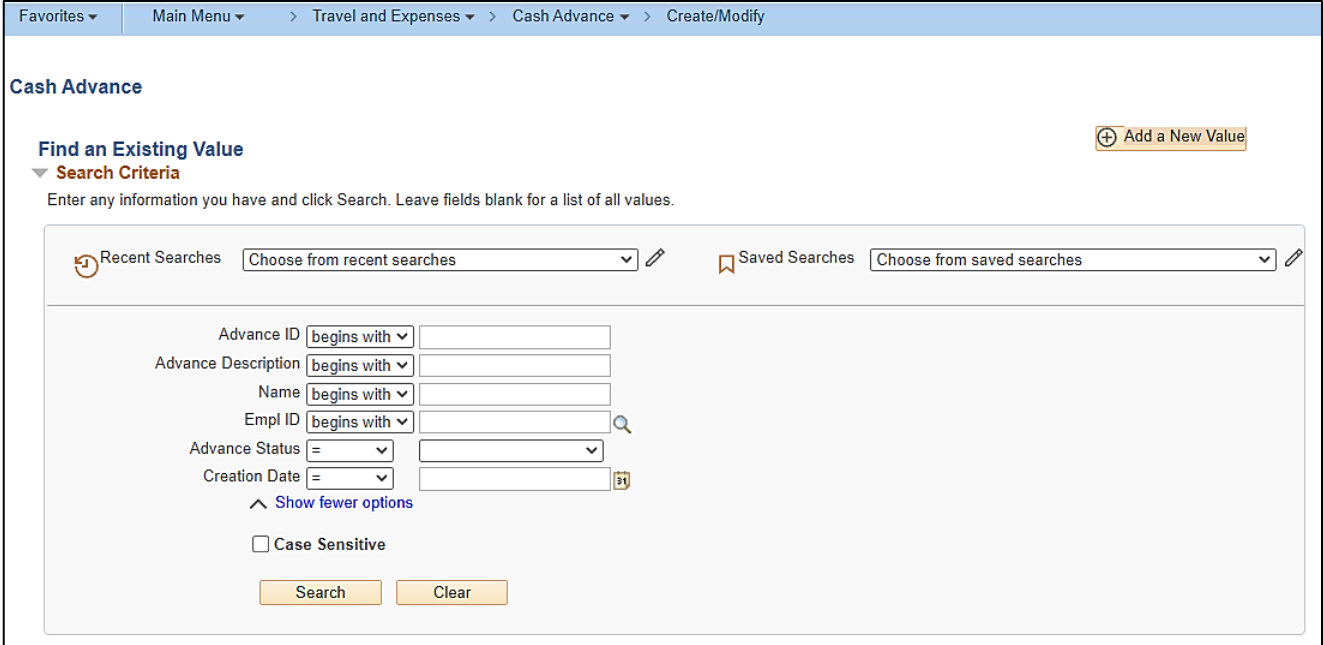



- Saved, but not been submitted for approval
- Withdrawn from approval after submission
- Sent Back by an approver with required comments. An email is sent to the employee or the proxy who keyed the Cash Advance

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
<p>The Cash Advance Add a New Value page displays.</p> 	
	<p>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.</p>
2.	Click the Find an Existing Value button. 

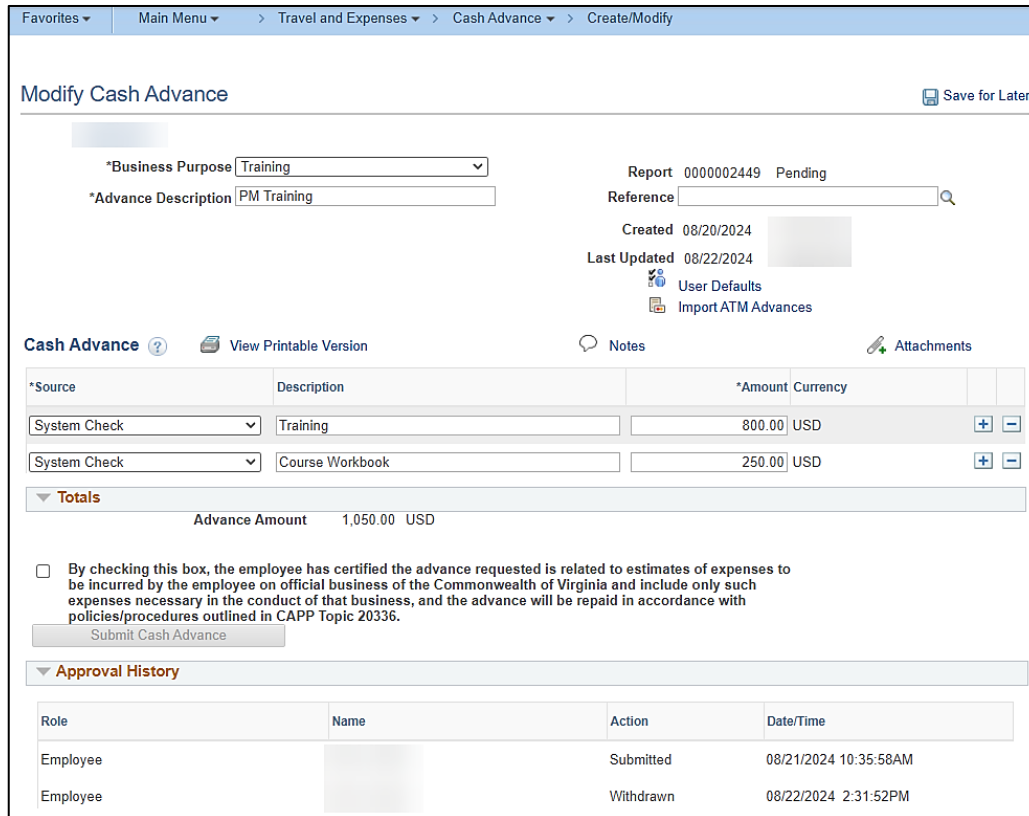
AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)




Step	Action
	<p>The Cash Advance Find an Existing Value Search page displays.</p> 
3.	<p>Enter the applicable Cash Advance ID Number in the Advance ID field.</p> 
	<p>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”.</p> <p>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.</p>
4.	<p>Click the Search button.</p> 

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)



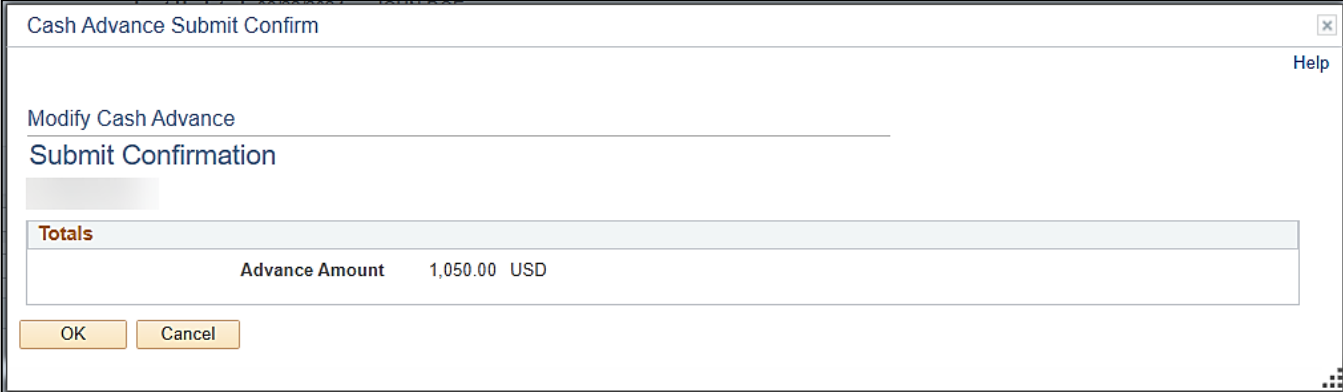

Step	Action
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The **Modify Cash Advance** page displays.



5.	Make any necessary changes to the Cash Advance (e.g., add or delete Lines, change amounts, etc.).
	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. <div data-bbox="256 1449 565 1507" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center; color: red; font-weight: bold;">Sent Back For Revision</p> </div>
	Click the Save for Later link if the transaction is not ready to be routed for approval. <div data-bbox="256 1591 495 1669" style="border: 2px solid red; padding: 5px; margin-top: 10px;">  Save for Later </div>
6.	When all updates are made, click the Certification Statement checkbox option. <div data-bbox="256 1759 1334 1873" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <input type="checkbox"/> By checking this box, the employee has certified the advance requested is related to estimates of expenses to be incurred by the employee on official business of the Commonwealth of Virginia and include only such expenses necessary in the conduct of that business, and the advance will be repaid in accordance with policies/procedures outlined in CAPP Topic 20336. </div>

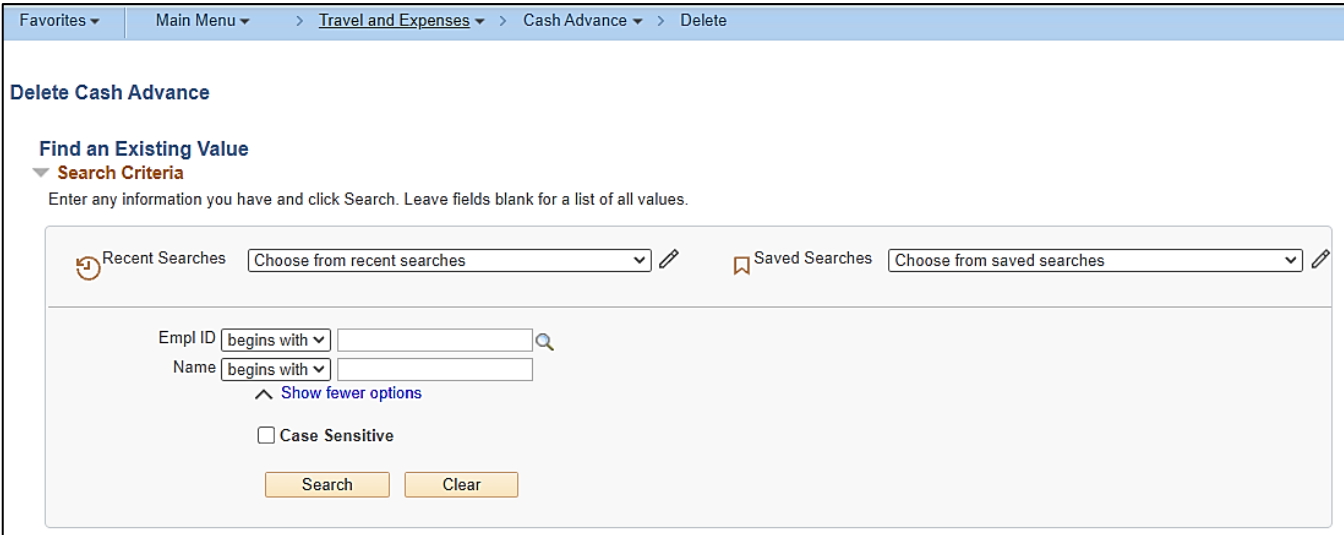


AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
	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. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div>
<p>The Modify Cash Advance Submit Confirmation page displays in a pop-up window.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div>	
8.	Click the OK button to submit the cash advance for review and approval. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div>



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

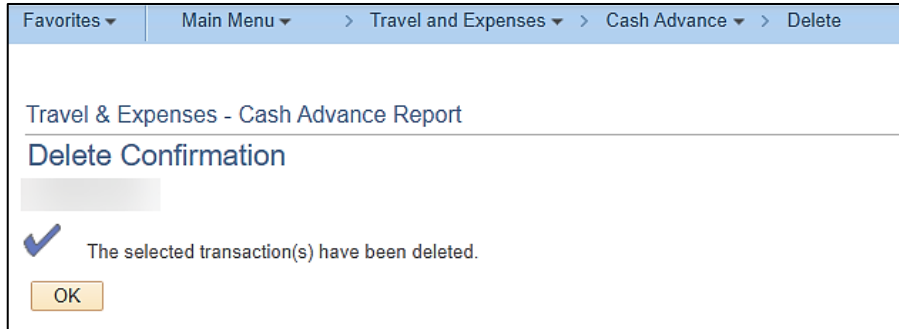
Step	Action
1.	Navigate to the Delete Cash Advance page using the following path: Main Menu > Travel and Expenses > Cash Advances > Delete
The Delete Cash Advance Find an Existing Value Search page displays.	
	
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled 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. 

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action												
	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. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-around;"> <div style="border: 2px solid red; padding: 5px 15px;">Search</div> <div style="padding: 5px 15px;">Clear</div> </div> </div>												
<p>The Delete Cash Advance Report page displays.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="font-size: small; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Favorites ▾ Main Menu ▾ > Travel and Expenses ▾ > Cash Advance ▾ > Delete </div> <div style="margin-top: 10px;"> <p>Travel & Expenses - Cash Advance Report</p> <p>Delete Cash Advance Report</p> <hr/> <p>Cash Advance Information</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: x-small;"> <thead> <tr> <th>Select</th> <th>Advance ID</th> <th>Description</th> <th>Creation Date</th> <th>Amount</th> <th>Currency</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td>0000002516</td> <td>PM Conference</td> <td>06/26/2025</td> <td>850.00</td> <td>USD</td> </tr> </tbody> </table> <div style="text-align: center; margin-top: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 10px; background-color: #f0f0f0;">Delete Selected Advance(s)</div> </div> </div> </div>		Select	Advance ID	Description	Creation Date	Amount	Currency	<input type="checkbox"/>	0000002516	PM Conference	06/26/2025	850.00	USD
Select	Advance ID	Description	Creation Date	Amount	Currency								
<input type="checkbox"/>	0000002516	PM Conference	06/26/2025	850.00	USD								
	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. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="text-align: center; font-size: x-small; border-bottom: 1px solid #ccc; padding-bottom: 2px;">Select</div> <div style="text-align: center; padding: 2px 0;"> <input style="width: 20px; height: 15px;" type="checkbox"/> </div> </div>												
5.	Click the Delete Selected Advance(s) button. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="border: 2px solid red; padding: 5px 20px; text-align: center; background-color: #f0f0f0;">Delete Selected Advance(s)</div> </div>												

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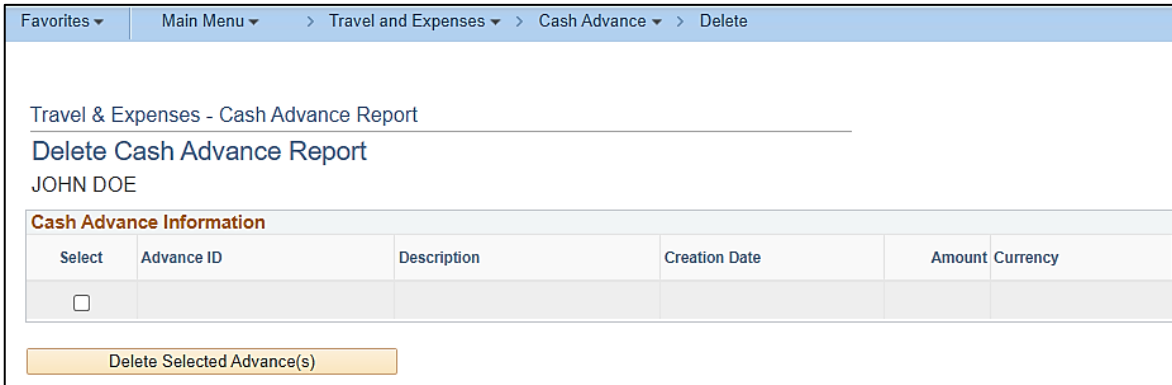
A **Confirmation** message displays indicating that the selected transaction has been deleted.



6. Click the **OK** button.



The page refreshes and the deleted Cash Advance no longer displays in the **Cash Advance Information** section.



A deleted Cash Advance cannot be viewed. The deletion is permanent and cannot be undone.

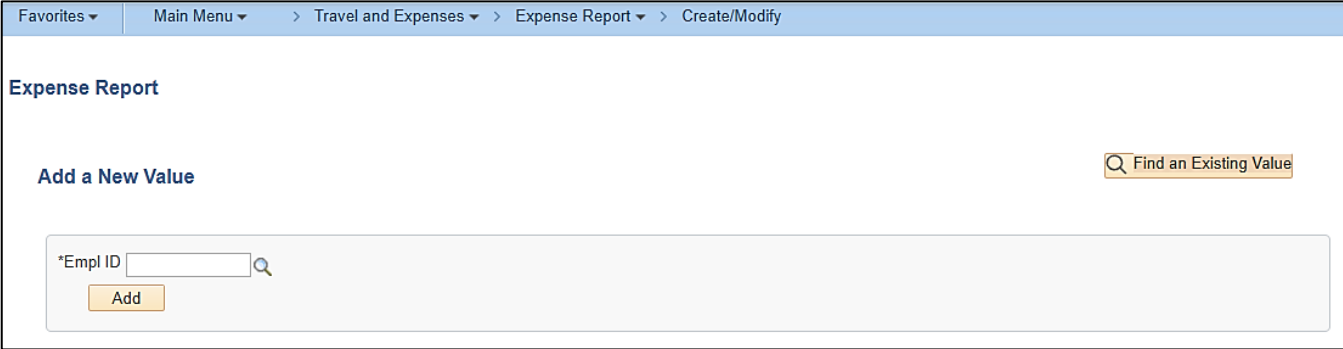


Updating an Expense Report

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:

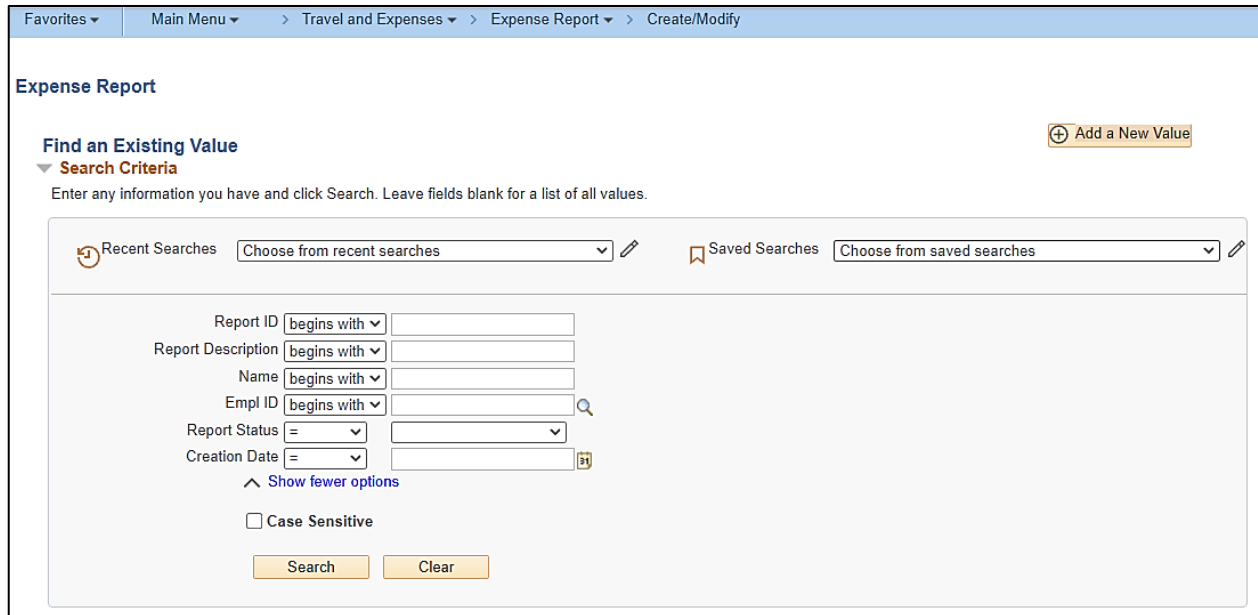
- Approved
- Denied by the approver (denied Expense Reports must be deleted). An email is sent to the employee or the proxy who keyed the Expense Report

Step	Action
1.	Navigate to the Expense Report page using the following path: Main Menu > Travel and Expenses > Expense Report > Create/Modify
<p>The Expense Report Add a New Value page displays.</p> 	
	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. 

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
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The **Expense Report Find an Existing Value Search** page displays.



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 Saved Searches

Report ID

Report Description

Name

Empl ID

Report Status

Creation Date

[Show fewer options](#)

Case Sensitive

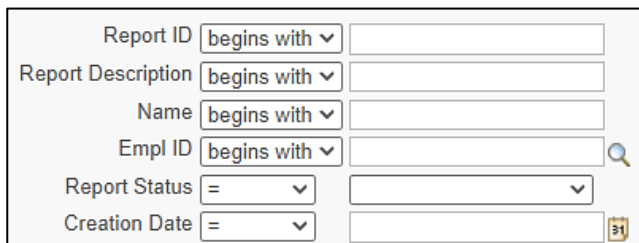
3. Enter the applicable Expense Report ID Number in the **Report ID** field.



Report ID



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”.



Report ID

Report Description

Name

Empl ID

Report Status

Creation Date

4. Click the **Search** button.

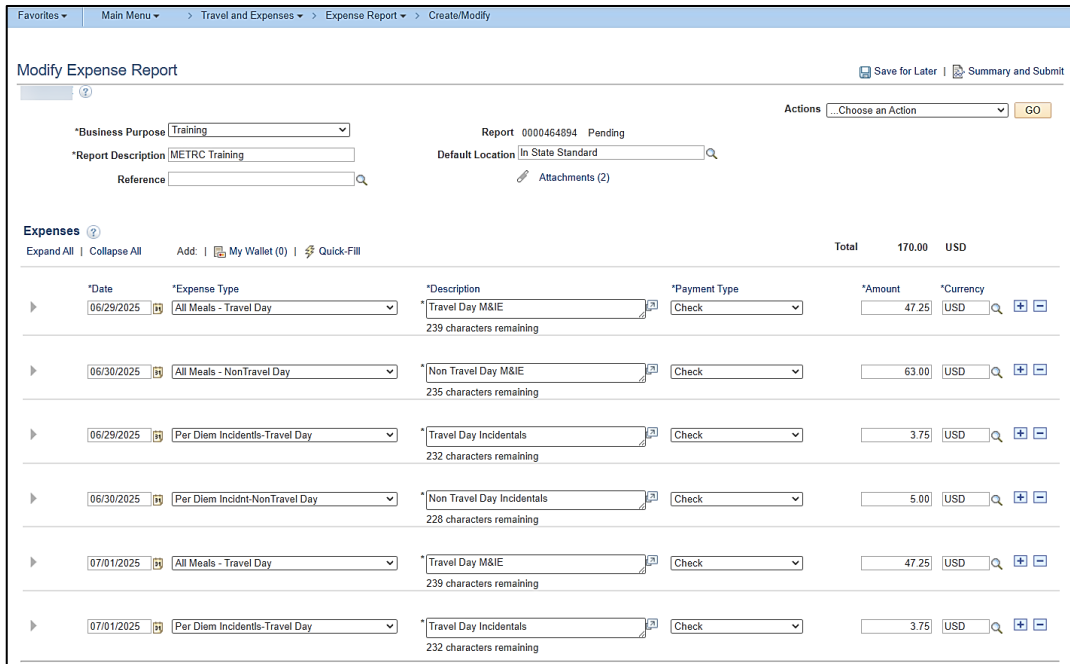



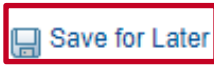
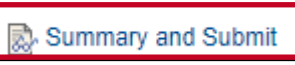
Users can only search for and update Expense Reports for employees for whom they are a proxy with “Edit & Submit” authorization. For more detailed information about authorizing a proxy, see the Job Aid titled **AP315_Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
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The **Modify Expense Report** page displays.

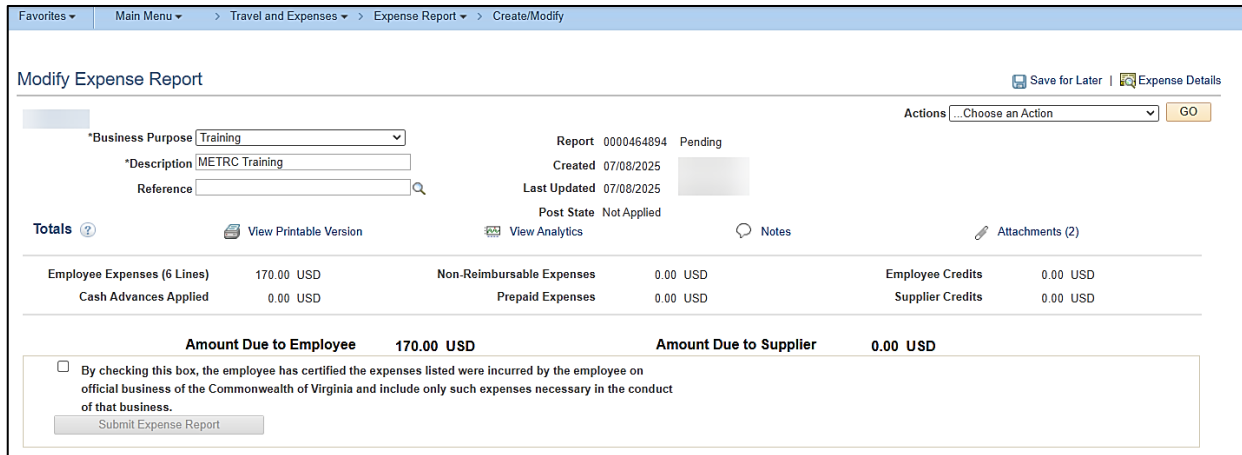


5.	<p>Make the required updates to the Expense Report. All Expense Lines are open for editing. Users can perform any action on the Expense Report that they could when creating it (e.g., add or delete Lines, change amounts, dates, locations, etc.).</p>
	<p>If modifying an Expense Report that has been 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.</p> <div data-bbox="256 1333 565 1396" style="border: 1px solid black; padding: 5px; text-align: center;"> <p>Sent Back For Revision</p> </div>
6.	<p>Click the Save for Later link if the transaction is not ready to be routed for approval.</p> <div data-bbox="256 1480 487 1543" style="border: 2px solid red; padding: 5px; text-align: center;">  </div>
7.	<p>When ready to submit the Expense Report after making revisions, click the Summary and Submit link at the top of the page.</p> <div data-bbox="256 1669 568 1732" style="border: 2px solid red; padding: 5px; text-align: center;">  </div>

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
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The **Modify Expense Report Summary and Submit** page displays.



Modify Expense Report

Business Purpose: Training
 Description: METRC Training
 Reference: [Search]

Report: 0000464894 Pending
 Created: 07/08/2025
 Last Updated: 07/08/2025
 Post State: Not Applied

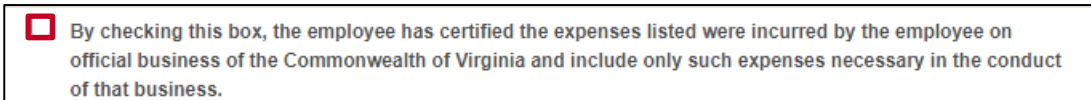
Employee Expenses (6 Lines)	170.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD
Amount Due to Employee		170.00 USD	Amount Due to Supplier		0.00 USD

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

8.

Click the **Certification Statement** checkbox option.



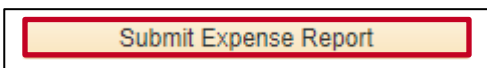
By checking this box, the employee has certified the expenses listed were incurred by the employee on official business of the Commonwealth of Virginia and include only such expenses necessary in the conduct of that business.



The **Submit Expense Report** button is now enabled.

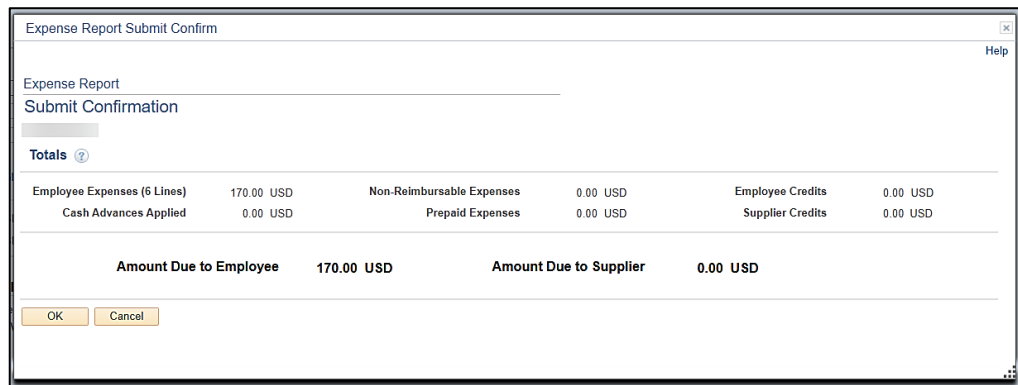
9.

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

Expense Report
 Submit Confirmation

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

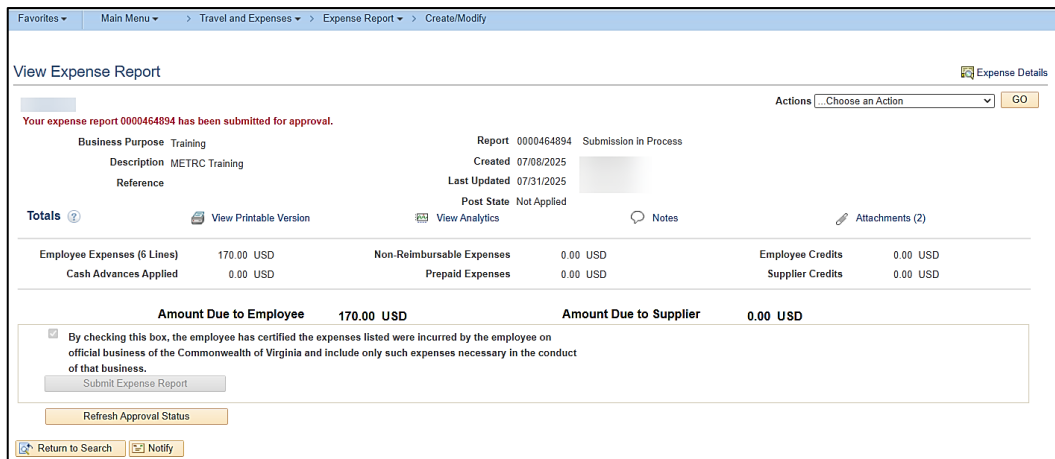
OK Cancel

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

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




The **View Expense Report** page displays.

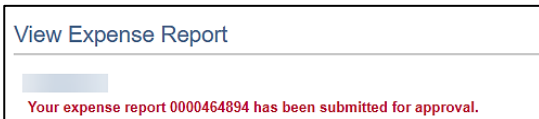



The screenshot shows the 'View Expense Report' interface. At the top, a red message states: 'Your expense report 0000464894 has been submitted for approval.' Below this, the report details are displayed, including Business Purpose (Training), Description (METRC Training), and Report ID (0000464894). A summary table shows the following values:

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	

At the bottom, there is a checkbox for certifying the expenses and a 'Submit Expense Report' button.

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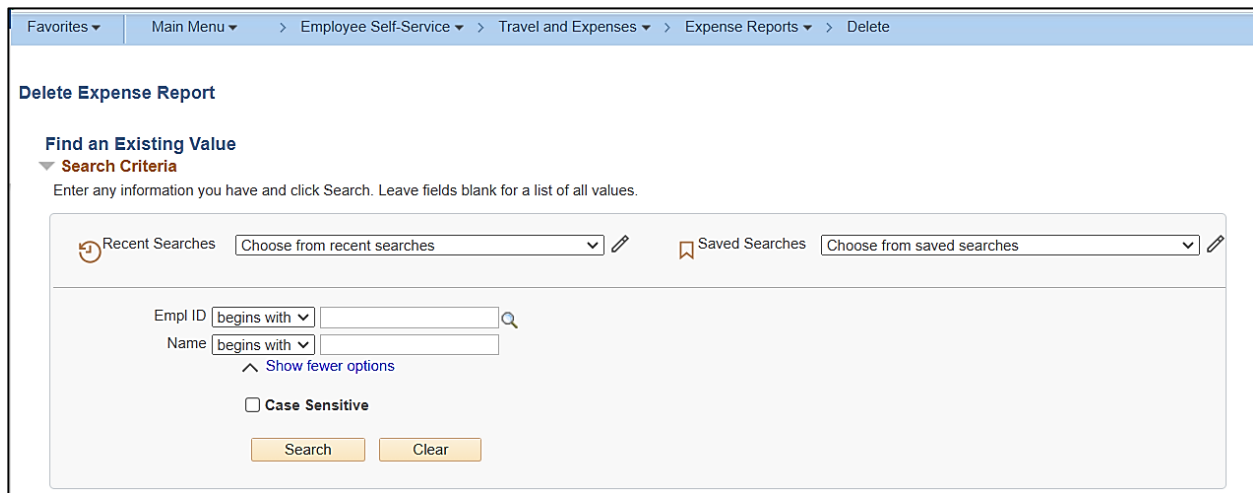
Deleting an Expense Report

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.



The screenshot shows the 'Delete Expense Report' page with the following elements:

- Navigation path: Favorites > Main Menu > Employee Self-Service > Travel and Expenses > Expense Reports > Delete
- Section: **Delete Expense Report**
- Section: **Find an Existing Value**
- Section: **Search Criteria**
- Text: 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 [text box]
- Name: begins with [text box]
- Link: Show fewer options
- Checkbox: Case Sensitive
- Buttons: Search, Clear


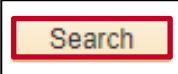
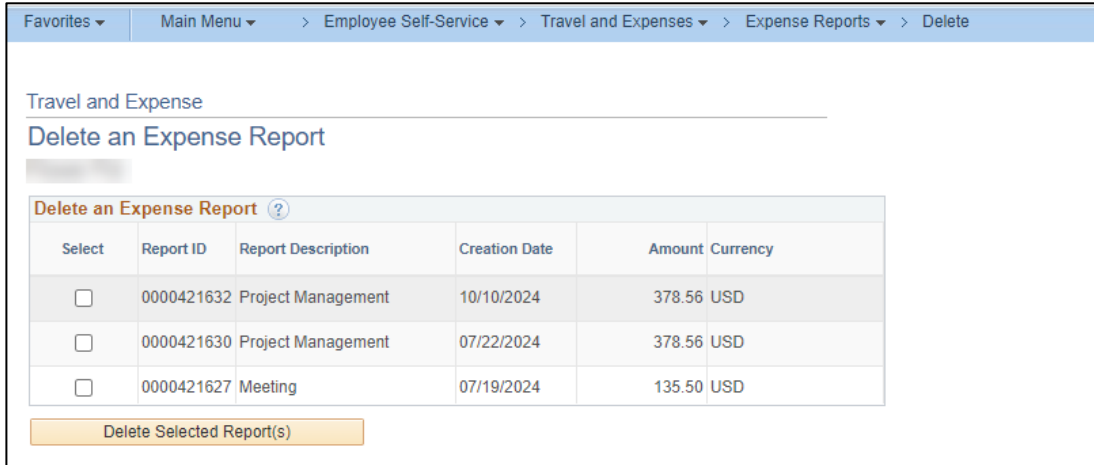

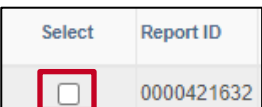
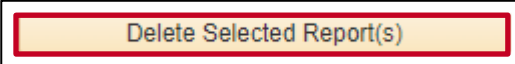
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled Overview of the Cardinal FIN Search Pages . This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	The user's Employee ID will default into the Empl ID field. Enter the applicable Employee ID or Name if deleting an Expense Report for another employee.

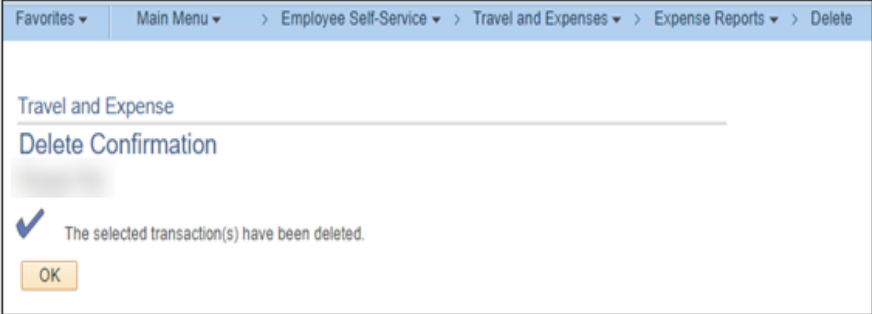




The close-up shows the search fields with a red box highlighting the Empl ID field:

- Empl ID: begins with [text box]
- Name: begins with [text box]

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action																								
	<p>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.</p>																								
<p>3.</p>	<p>Click the Search button.</p> 																								
<p>The Delete an Expense Report page displays.</p>																									
 <table border="1" data-bbox="300 934 1149 1134"> <thead> <tr> <th>Select</th> <th>Report ID</th> <th>Report Description</th> <th>Creation Date</th> <th>Amount</th> <th>Currency</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>0000421632</td> <td>Project Management</td> <td>10/10/2024</td> <td>378.56</td> <td>USD</td> </tr> <tr> <td><input type="checkbox"/></td> <td>0000421630</td> <td>Project Management</td> <td>07/22/2024</td> <td>378.56</td> <td>USD</td> </tr> <tr> <td><input type="checkbox"/></td> <td>0000421627</td> <td>Meeting</td> <td>07/19/2024</td> <td>135.50</td> <td>USD</td> </tr> </tbody> </table> <p style="text-align: center;">Delete Selected Report(s)</p>		Select	Report ID	Report Description	Creation Date	Amount	Currency	<input type="checkbox"/>	0000421632	Project Management	10/10/2024	378.56	USD	<input type="checkbox"/>	0000421630	Project Management	07/22/2024	378.56	USD	<input type="checkbox"/>	0000421627	Meeting	07/19/2024	135.50	USD
Select	Report ID	Report Description	Creation Date	Amount	Currency																				
<input type="checkbox"/>	0000421632	Project Management	10/10/2024	378.56	USD																				
<input type="checkbox"/>	0000421630	Project Management	07/22/2024	378.56	USD																				
<input type="checkbox"/>	0000421627	Meeting	07/19/2024	135.50	USD																				
	<p>All Expense Reports for the employee that are eligible for deletion will display in the Delete an Expense Report section.</p>																								
<p>4.</p>	<p>Click the Select checkbox option for the Expense Report that requires deletion.</p> 																								
<p>5.</p>	<p>Click the Delete Selected Report(s) button.</p> 																								

Step	Action
	<p>A Confirmation message displays indicating that the selected transaction has been deleted.</p> 
6.	<p>Click the OK button.</p> 
	<p>A deleted Expense Report cannot be viewed. The deletion action is permanent and cannot be undone.</p>

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

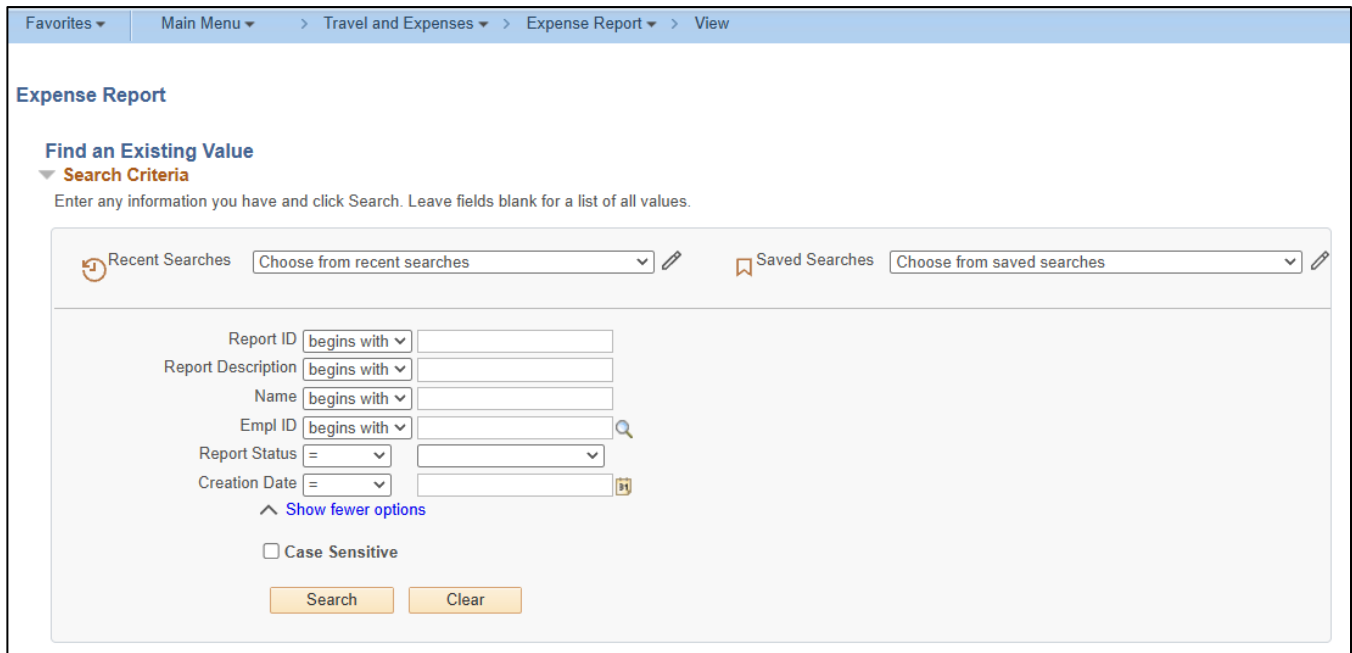
Withdrawing Expense Transactions

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 not 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.

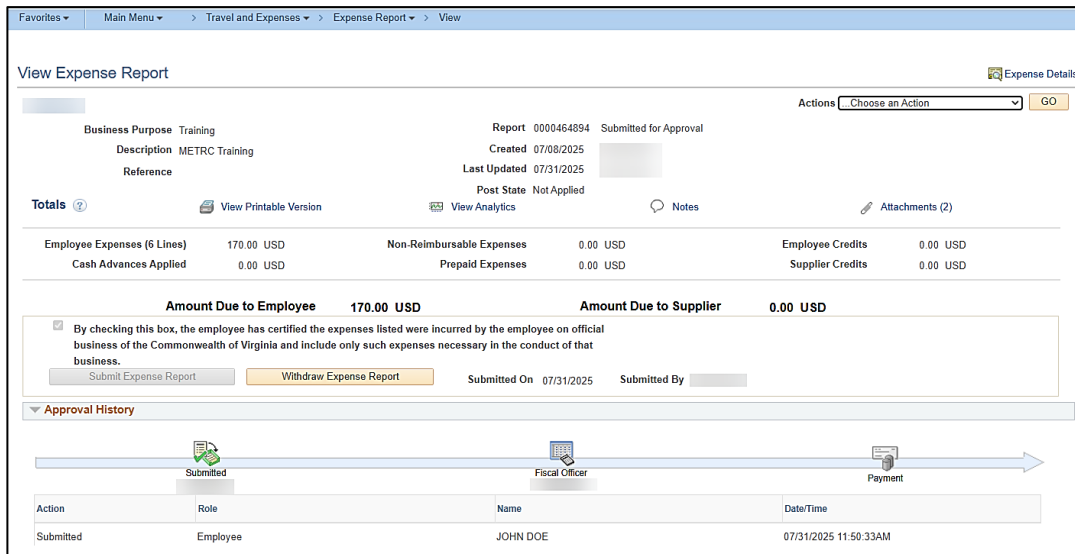



For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
2.	Enter the applicable Expense Report ID Number in the Report ID field. 
3.	Click the Search button. 

The **View Expense Report** page displays.



View Expense Report

Business Purpose: Training
 Description: METRC Training
 Reference: Report 0000464894 Submitted for Approval
 Created: 07/08/2025
 Last Updated: 07/31/2025
 Post State: Not Applied

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**


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 Withdraw Expense Report Submitted On: 07/31/2025 Submitted By: [Redacted]

Approval History

Action	Role	Name	Date/Time
Submitted	Employee	JOHN DOE	07/31/2025 11:50:33AM

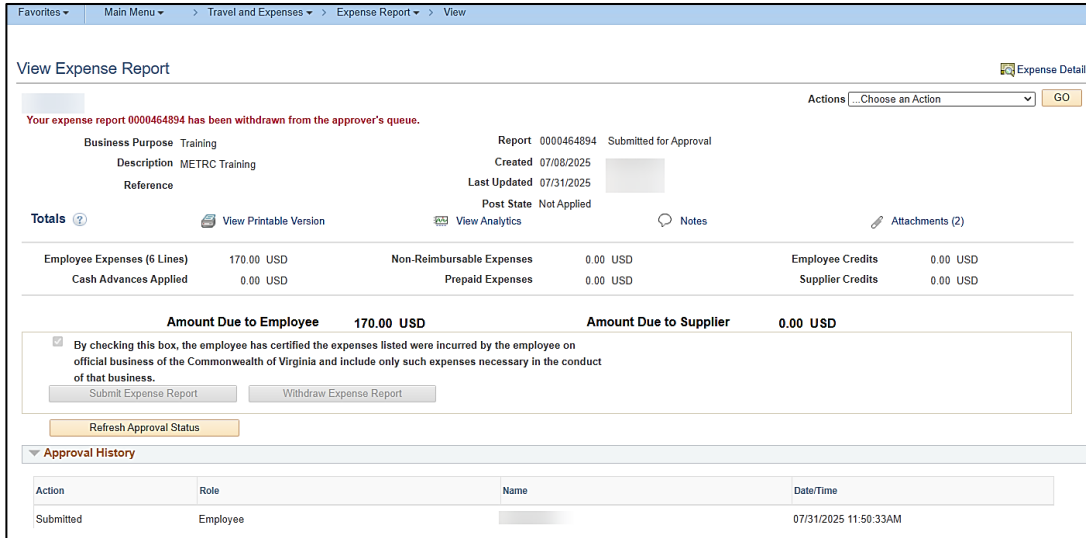
4.	Click the Withdraw Expense Report button. 
----	--

 The **Withdraw Expense Report** button will not be enabled if the approver has taken action.

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
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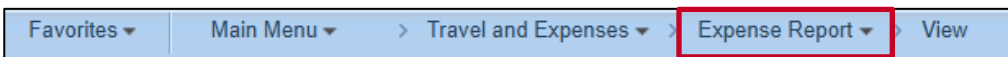
The page refreshes.



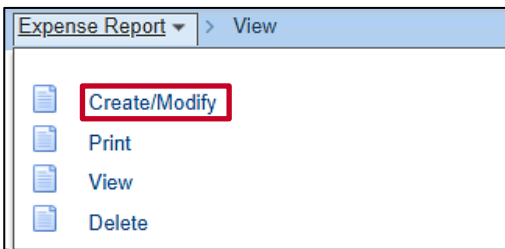

A message displays at the top of the page indicating that the Expense Report has been withdrawn from the approver's queue.

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.



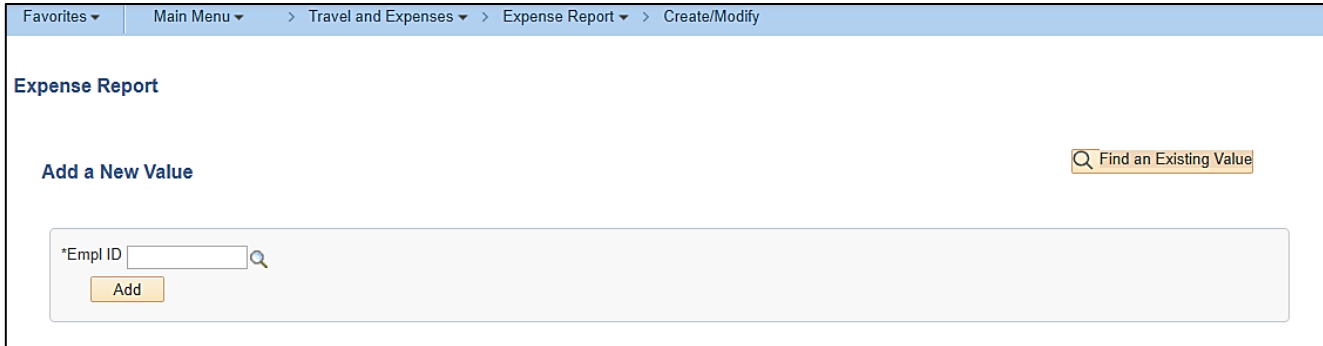
6. Click the **Create/Modify** list item.



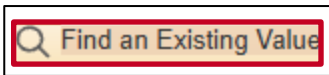
AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
------	--------

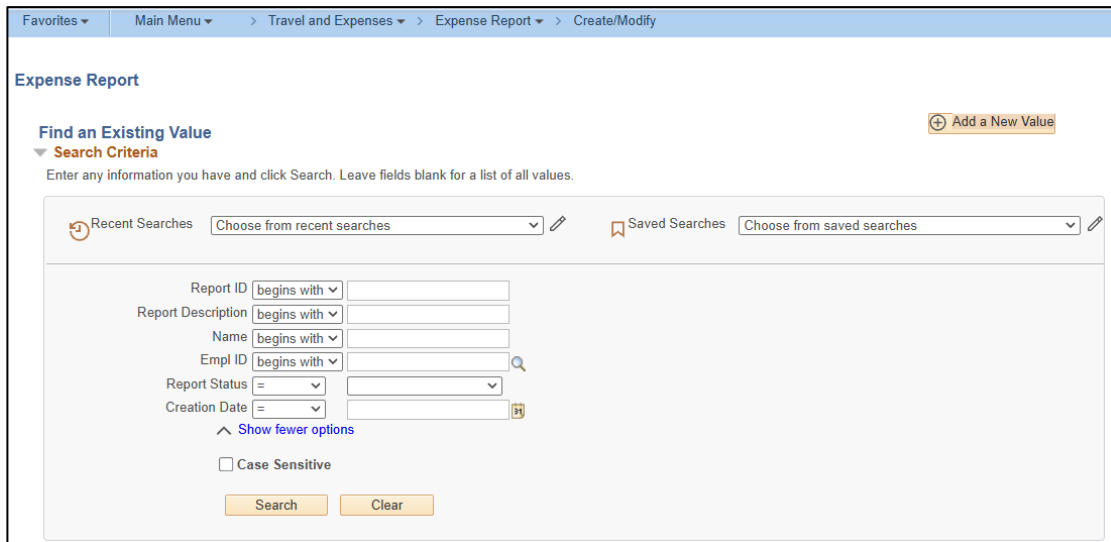
The **Expense Report Add a New Value** page displays.



7. Click the **Find an Existing Value** button.



The **Expense Report Find an Existing Value Search** page displays.



8. Enter the applicable Expense Report ID Number in the **Report ID** field.



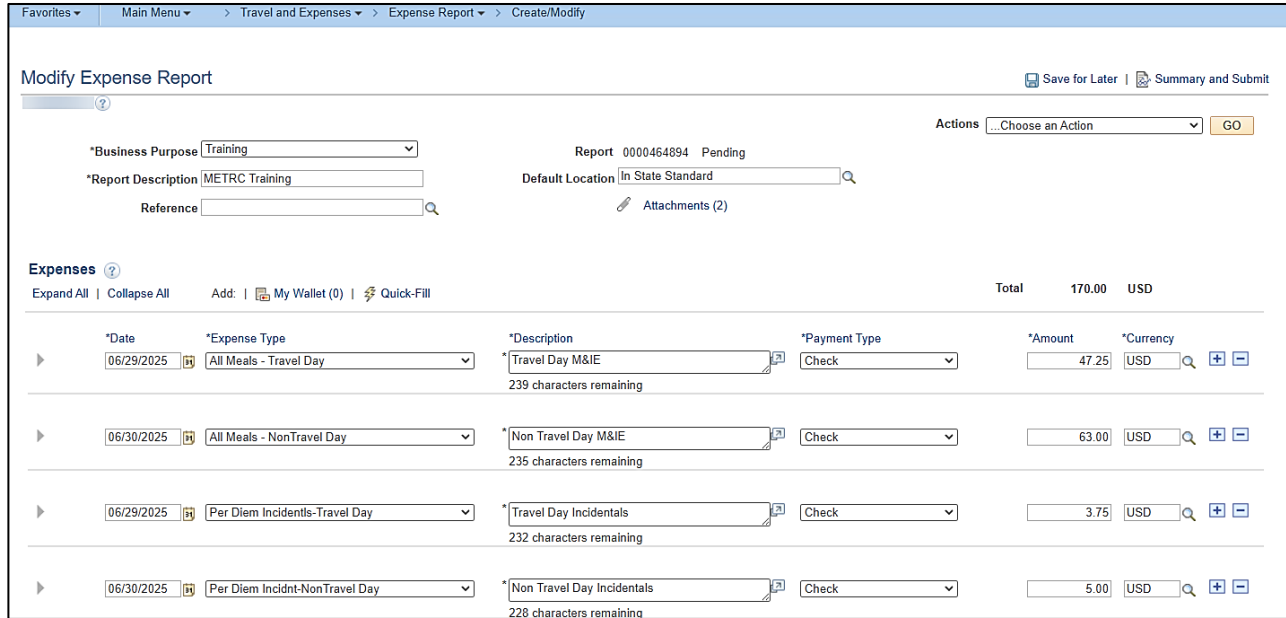
9. Click the **Search** button.



AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
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The **Modify Expense Report** page displays.



Modify Expense Report Save for Later | Summary and Submit

Report 0000464894 Pending

*Business Purpose: Training

*Report Description: METRC Training

Reference: [input]

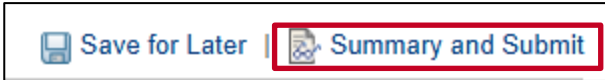
Default Location: In State Standard

Attachments (2)

Expenses Total 170.00 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency
06/29/2025	All Meals - Travel Day	Travel Day M&IE 239 characters remaining	Check	47.25	USD
06/30/2025	All Meals - NonTravel Day	Non Travel Day M&IE 235 characters remaining	Check	63.00	USD
06/29/2025	Per Diem Incidentals-Travel Day	Travel Day Incidentals 232 characters remaining	Check	3.75	USD
06/30/2025	Per Diem Incidnt-NonTravel Day	Non Travel Day Incidentals 228 characters remaining	Check	5.00	USD

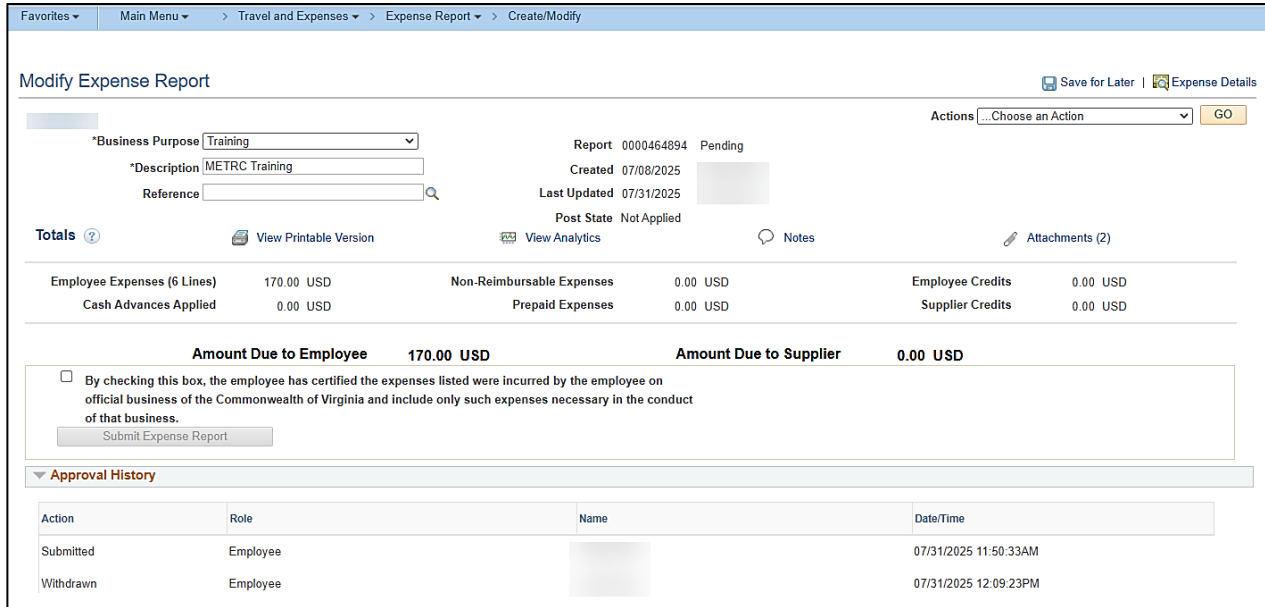
10.	Make the necessary updates.
11.	Click the Summary and Submit link at the top of the page.



AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
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The **Modify Expense Report Summary and Submit** page displays.



Modify Expense Report

*Business Purpose: Training
 *Description: METRC Training
 Reference: [Search]



Report: 0000464894 Pending
 Created: 07/08/2025
 Last Updated: 07/31/2025
 Post State: Not Applied

Totals: 170.00 USD (Employee Expenses), 0.00 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)

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.

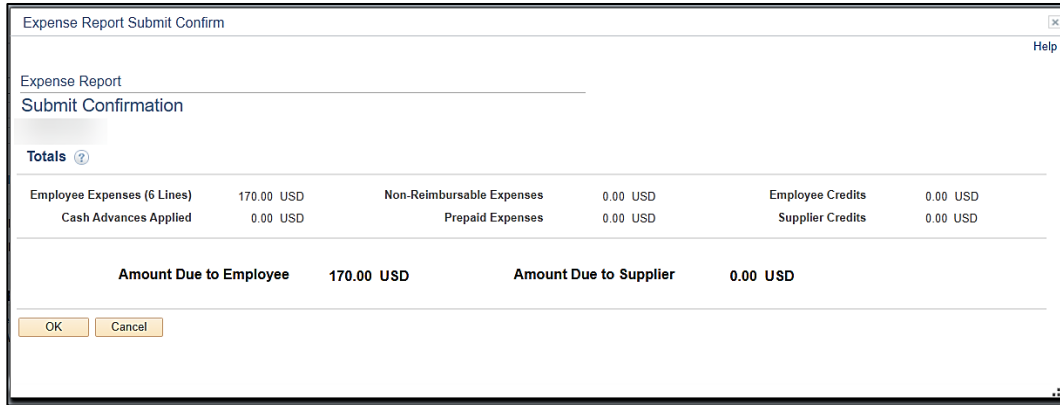
Action	Role	Name	Date/Time
Submitted	Employee		07/31/2025 11:50:33AM
Withdrawn	Employee		07/31/2025 12:09:23PM

	<p>The Approval History section shows the actions that have been taken on this expense transaction. Notice that the withdrawal is recorded here.</p>
<p>12.</p>	<p>Click the Certification Statement checkbox option.</p> <div data-bbox="256 1218 1282 1365" style="border: 1px solid black; padding: 5px;"> <input checked="" type="checkbox"/> 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. <input type="button" value="Submit Expense Report"/> </div>
	<p>The Submit Expense Report button is now enabled.</p>
<p>13.</p>	<p>Click the Submit Expense Report button.</p> <div data-bbox="256 1564 698 1627" style="border: 2px solid red; padding: 5px; text-align: center;"> <input type="button" value="Submit Expense Report"/> </div>

AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action
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The **Expense Report Submit Confirmation** page displays in a pop-up window.



Expense Report Submit Confirm

Expense Report
Submit Confirmation

Totals

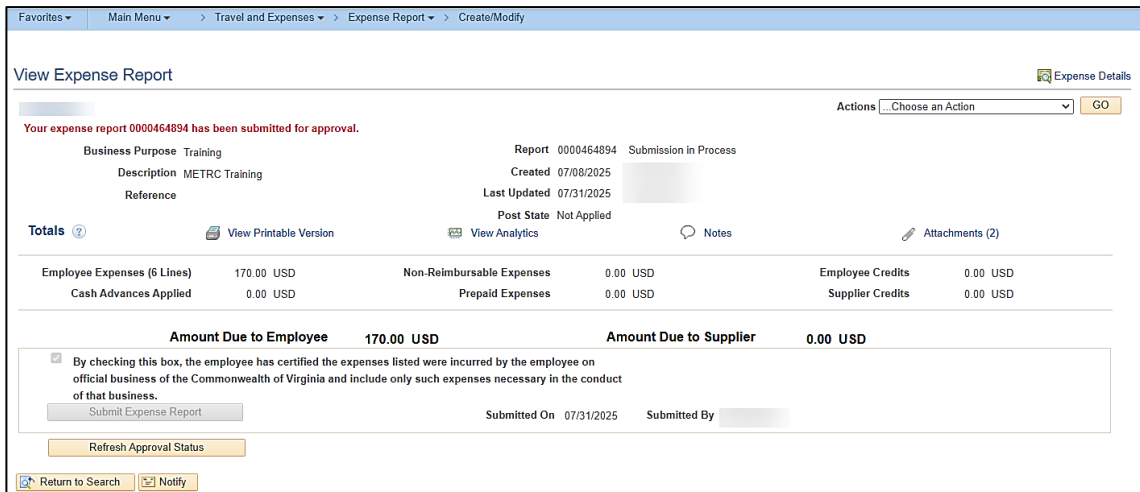
Employee Expenses (6 Lines)	170.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD
Amount Due to Employee		170.00 USD	Amount Due to Supplier		0.00 USD

OK Cancel

14.	Click the OK button.
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The **View Expense Report** page displays.



View Expense Report

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

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

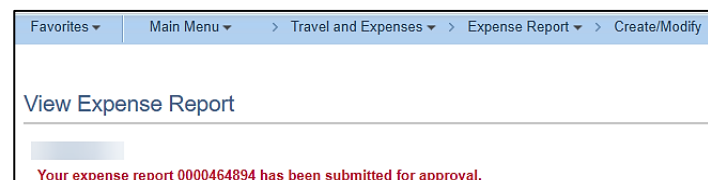
By checking this box, the employee has certified the expenses listed were incurred by the employee on official business of the Commonwealth of Virginia and include only such expenses necessary in the conduct of that business.

Submit Expense Report Submitted On 07/31/2025 Submitted By


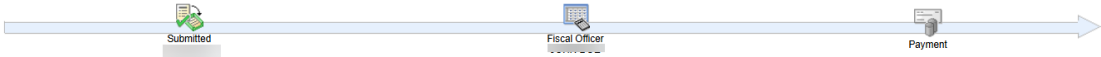
Refresh Approval Status

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.
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AP315_Updating, Deleting, and Withdrawing Expense Transactions (VDOT Only)

Step	Action																
	<p>The Refresh Approval Status button can be clicked to view all of the actions for the Expense Report as well as the approval routing.</p> <div data-bbox="256 453 634 506" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p style="text-align: center;">Refresh Approval Status</p> </div> <div data-bbox="256 525 1412 766" style="border: 1px solid black; padding: 5px;"> <p>▼ Approval History</p>  <table border="1" data-bbox="277 632 1372 756"> <thead> <tr> <th>Action</th> <th>Role</th> <th>Name</th> <th>Date/Time</th> </tr> </thead> <tbody> <tr> <td>Submitted</td> <td>Employee</td> <td></td> <td>07/31/2025 11:50:33AM</td> </tr> <tr> <td>Withdrawn</td> <td>Employee</td> <td></td> <td>07/31/2025 12:09:23PM</td> </tr> <tr> <td>Resubmitted</td> <td>Employee</td> <td></td> <td>07/31/2025 12:36:09PM</td> </tr> </tbody> </table> </div>	Action	Role	Name	Date/Time	Submitted	Employee		07/31/2025 11:50:33AM	Withdrawn	Employee		07/31/2025 12:09:23PM	Resubmitted	Employee		07/31/2025 12:36:09PM
Action	Role	Name	Date/Time														
Submitted	Employee		07/31/2025 11:50:33AM														
Withdrawn	Employee		07/31/2025 12:09:23PM														
Resubmitted	Employee		07/31/2025 12:36:09PM														