Expense Report Event

Employee (Expense Owner) as Self Delegate for Employee/(Expense Owner) Enters and Submits an Expense Report (may contain T&E card reconciliation and/or reimbursable lines). Entry includes work tags.

Submitter is Expense Owner?

YES

NO

Approval/Return by Expense Owner

Expense Support Specialist reviews for Accuracy and Completeness, Updates as Required, and Approves

Grant is Charged?

YES

Approval/Return by Grant Manager**

NO

Project is Charged?

YES

Approval/Return by Project Budget Specialist**

NO

Non-Allocated Gift Charged?

YES

Approval/Return by Gift Manager**

NO

Designated is Charged?

YES

Approval/Return by P2P Approver**

NO

Policy Exception?

YES

Approval/Return by Senior Department Finance Approver**

NO

Central Approval Required?*

YES

Approval/Return by Central PSDS Travel Team

NO

END

* Day Trip Meals with Travel Expenses, Awards/Gifts/Cash Withdrawals, Missing Receipt with No Justification, Duplicate Expense Lines, Non-Capital Expense Item >= $5,000, Personal Expenses

**Approvers will not have the option to update the purchase requisition during the approval process, as there is no automation to re-route the requisition if work tags are updated. This introduces a risk that the funds owner may be unaware of the procurement.