Acting as a Delegate in MyExpense

This job aid contains the necessary information to create an Expense Report or Cash Advance on behalf of another user in MyExpense. You cannot create an Expense Report for a non-employee as a delegate; see Creating an Expense Report for a Non-Employee in MyExpense.

Logging into MyExpense and Changing Your Profile to Another User

Login to MyAccess (not shown). Scroll down to locate and select MyExpense from the applications menu. If you have set MyAccess to display “Favorites”, you may need to change to “All Apps” or search for MyExpense.

The MyExpense home page will display in a new tab. If you start a report from your home page, MyExpense assumes the report is for you. To act as a delegate and create a report for another MyExpense user:

1. Click the Profile arrow in the upper right hand corner of the MyExpense home page
2. Click the Administer for another user… drop-down arrow
3. Choose the person for whom you are creating an Expense Report or Cash Advance
   Only people who have granted delegate access to you in MyExpense will display. If you need to create an Expense Report or Cash Advance for someone who is not displayed, have the person grant you delegate access following the job aid Granting or Removing Delegate Access in MyExpense.
4. Click the Start Session button to begin acting on behalf of the chosen user.

Start a New Expense Report or Cash Advance for the Selected User

1. Click the correct menu item to:
   a. Start a new Expense Report
   b. Begin a new Cash Advance
   c. Upload Receipts

Create the Expense Report or Cash Advance following the normal process.
See the job aids Creating an Expense Report and Working with Cash Advances for detailed instructions.

Return to Your Profile

After you have completed your delegation activities:
1. Click the Profile arrow from the MyExpense home page
2. Click the Done acting for others button

This returns MyExpense to your personal profile.

Hint: Be sure to follow these two steps if you have completed entering information for others and will be entering information for yourself. If you do not, you will continue entering data for the chosen user.

MyExpense will end your delegation activities when you log out. When you log in again, MyExpense will default to creating Expense Reports and Cash Advances for you.

More information on MyExpense is available on the Supply Chain Management website.