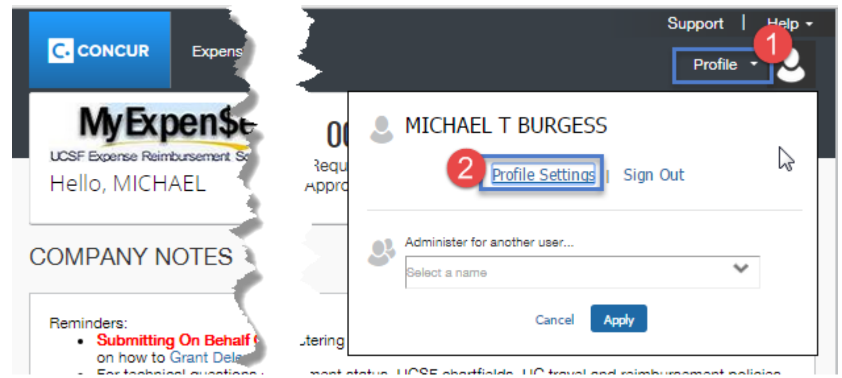
Granting or Removing Delegate Access in MyExpense

This job aid explains how to:

- Add delegates to your **MyExpense** profile
- Assign the tasks a delegate may perform on your behalf
- Delete delegates from your profile

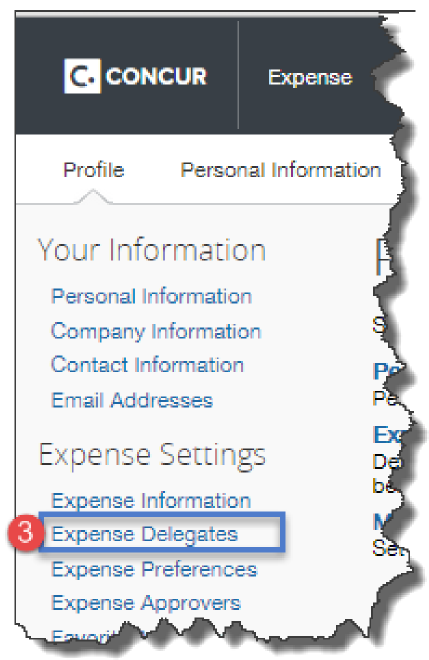
Logging in and Accessing Your Profile

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.

1. Click the **Profile** drop-down menu in the upper right-hand corner of the **MyExpense** home page
2. Click the **Profile Settings** link; your profile options page displays
3. Click the **Expense Delegates** link



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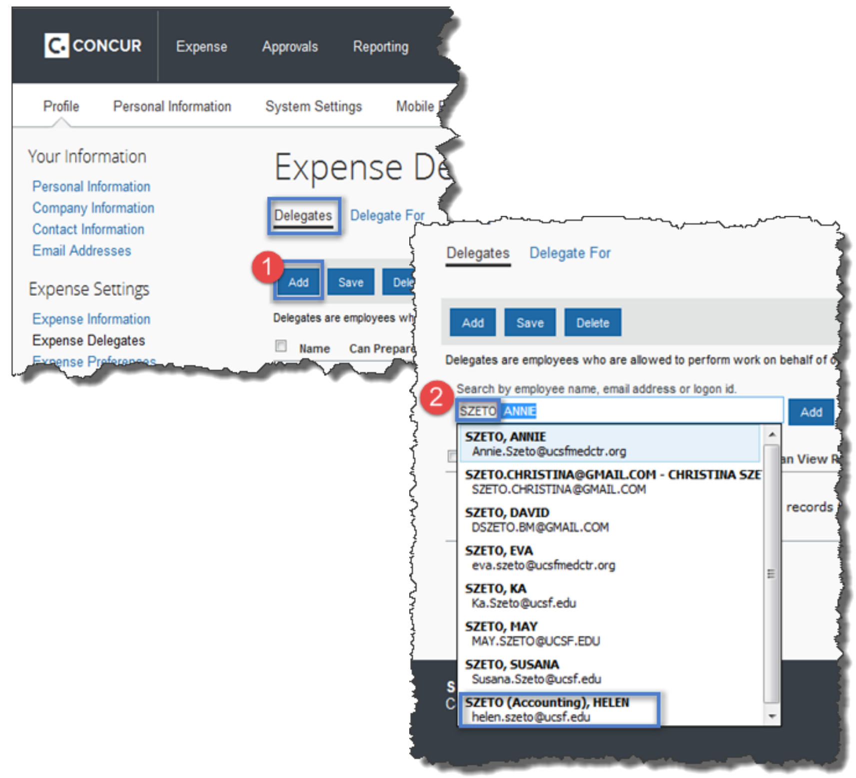
Adding Delegates

1. Click the **Add** button on the Delegates tab to assign a new delegate

2. In the Search field that displays, begin typing the employee's **First** or **Last Name**, **Email Address**, or **log-on ID** then select the correct name from the drop-down menus illustrated



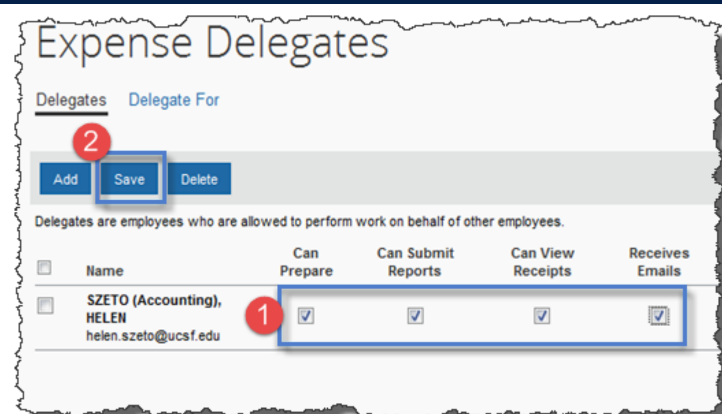
Setting Delegate Task Permissions

1. Select the tasks each delegate will be able to perform using the checkboxes.
Note: for a delegate to be most effective, it is recommended you choose at least the options shown in green:

Checkbox	Definition
Can Prepare	Delegate can prepare your Expense Report
Can View Receipts	Delegate can view your saved receipts
Can Submit Reports	Delegate can submit Expense Reports
Receives Emails	Delegate receives a copy of MyExpense emails
Receives Approval Emails	Delegate receives a copy of Approval emails

2. When you are finished selecting task permissions, click the **Save** button

Repeat sections **Adding Delegates** and **Selecting Delegate Task Permissions** to add additional delegates, if desired.



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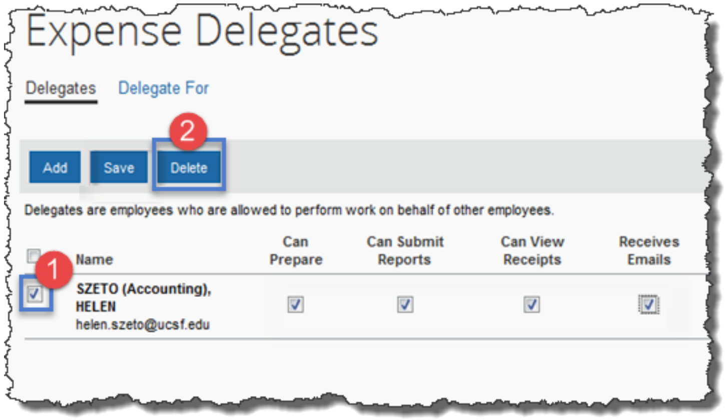
Deleting Delegates

1. To remove delegate(s) you no longer need on your profile, click the checkbox(es) next to the delegates you want to remove on the **Expense Delegates** screen
2. Click the **Delete** button to remove the selected delegate(s)



3. Click **OK** on in the **Message from webpage** pop-up to confirm

The selected delegates will then be removed from your Profile.