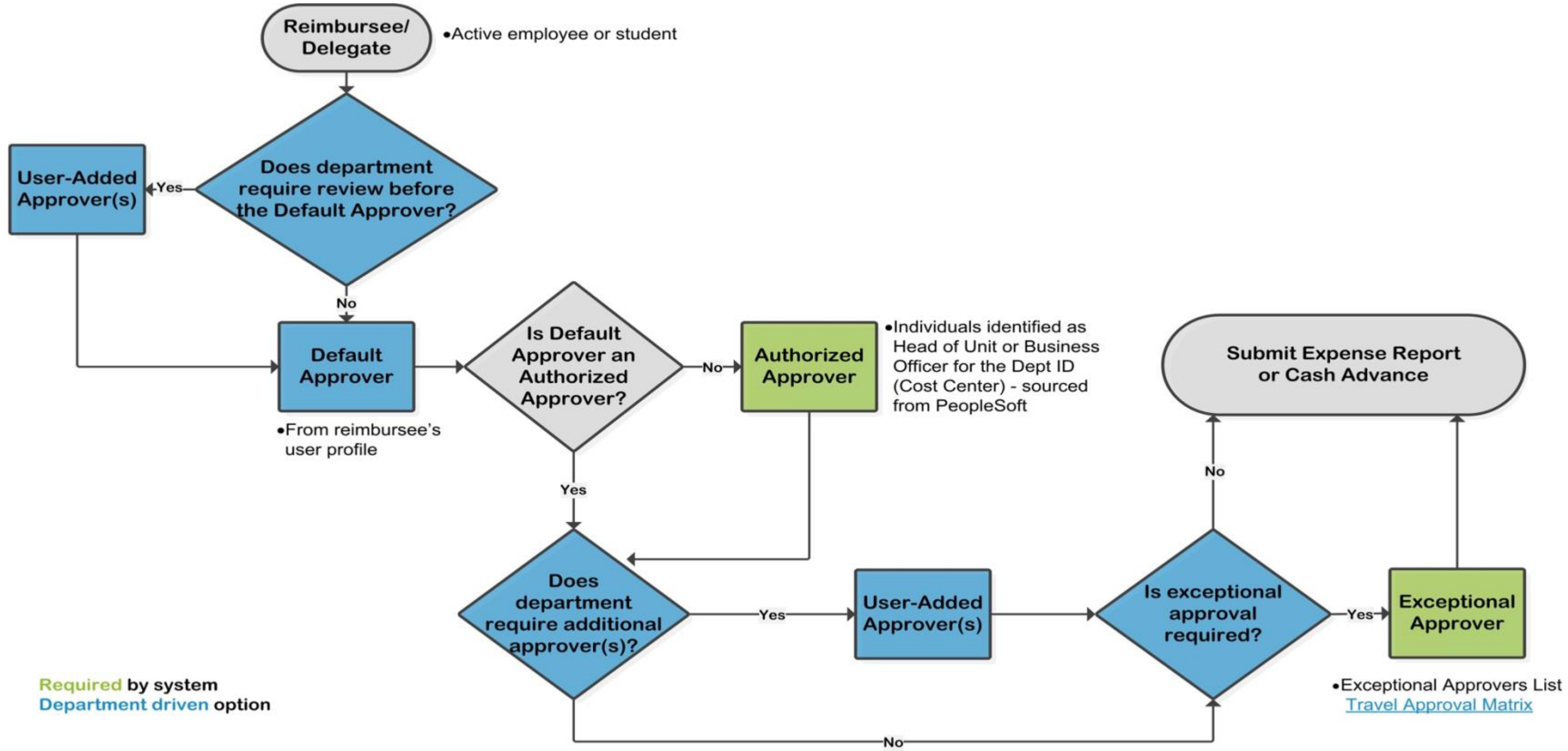
The **MyExpense** Approver Guide provides step-by-step instructions on how to:

- Access an Expense Report or Cash Advance for review
- Review Expense Reports and Cash Advances
- View and/or add additional approval workflow steps
- Approve and forward an Expense Report to one additional approver
- Return an Expense Report to an employee for correction or denial without adjusting workflow
- Approve an Expense Report without adjusting workflow
- Approve or deny Cash Advance requests

MyExpense Workflow



Default Approver	Reviews the Expense Report prior to the Authorized Approver. If the Default Approver is also an Authorized Approver, no additional Authorized Approver is required.
User-Added Approver	Optional additional approval occurs after the Default Approver and before the Authorized Approver. This added "approver" reviews the Expense Report but does ***not*** have final authority to approve a report. The addition of a user-added approver is determined solely by the MyExpense user and/or his or her department, and is not required by the system.
Authorized Approver	The Authorized Approver provides final approval and authority over the submitted Expense Report.

Logging into MyExpense and the MyExpense Home Page

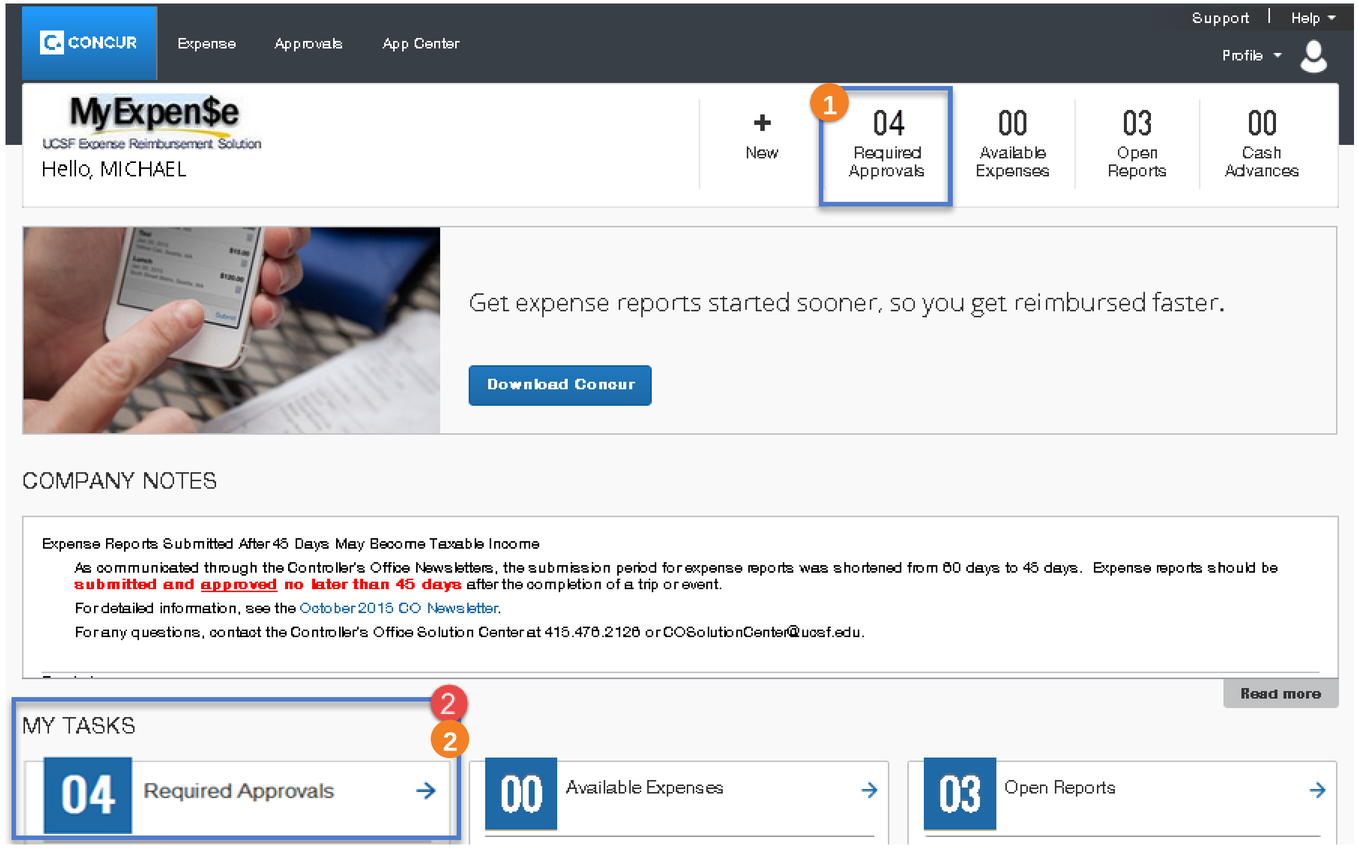
Log into **MyExpense** via **[MyAccess]** (not shown) by selecting **MyExpense** from the applications menu. If you need more information about using **MyAccess**, see the [MyAccess FAQs].

The **MyExpense** home page is designed to give users quick access to their most important tasks

1. The top display includes an overview of your tasks and a counter for each task. In the example, the Approver has four reports to approve and three open reports.

   Hover your mouse over the **Required Approvals** menu to access them.

2. **My Tasks** (at the bottom of the home page) also contains a link to the approval queue. Click **Required Approvals** to go to your approval queue.

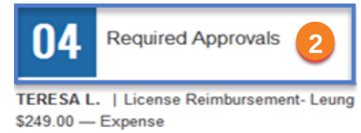


Accessing an Expense Report or Cash Advance for Review

To select an Expense Report or Cash Advance for approval:

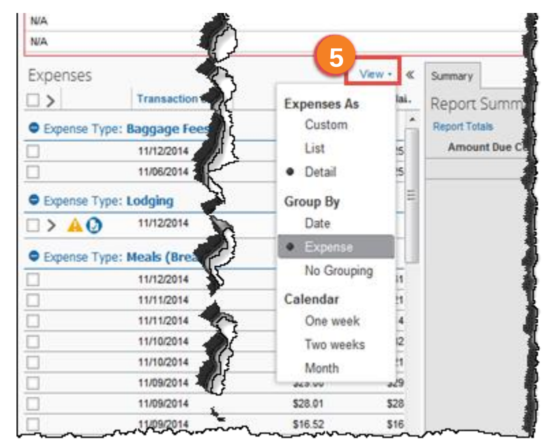
1. Scroll down to reveal the **Required Approvals** task in the **My Tasks** section (not shown)
2. Click the **Required Approvals** tile to display the reports you need to review and approve
3. The **Expense Reports** tab displays the Expense Reports waiting for your review and approval. The **Cash Advances** tab displays Cash Advance requests waiting for your review and approval.

   Note: the **03** and **01** shown in this example are the number of reports in each approval queue

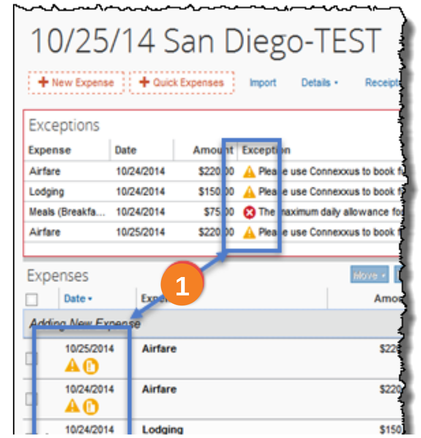


4. Click on the blue link to view the specific report.

5. To customize your report view, click the **View** drop-down menu and choosing the desired option. Expenses can be viewed as:
   - List
   - Detail
   - Grouped by Date, Expense, or No Grouping
   - Viewed by Calendar date (One week, Two weeks, or Month)



Reviewing Expense Reports and Cash Advances

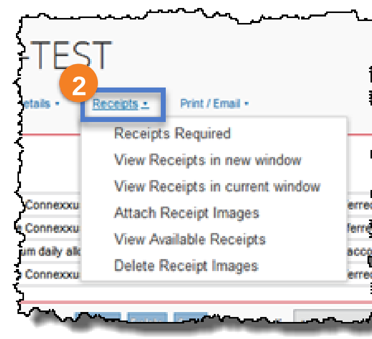


Before approving an Expense Report, approvers should be sure that the report complies with all travel policies, and that the Cash Advance request complies with cash advance policies. If you have questions, email or call the Accounts Payable Helpdesk Center at SCMAP@ucsf.edu or 415-514-4100.

Employee expense reports must be submitted to an Approver within 45 days after the trip or last purchase to avoid tax consequences. Approvers must confirm that the date entered in the “End of Trip/Last Purchase Date” is accurate and matches submitted documentation.

1 Begin by reviewing any exceptions marked by the brightly colored icons:

- The icon indicates one or more exceptions on an expense line
- The icon indicates a receipt is required
- The icon indicates a receipt has been attached that you can view
- The icon indicates the expense has itemization you can view; click to expand
- The icon indicates there is a policy violation that must be remedied before the report can be approved



2 You can use the **Receipts** drop-down menu to:

- Show the **Receipts Required**
- **View Receipts in** a **new window** or the **current window**
- **Attach Receipt Images** if necessary
- **View Available Receipts**
- **Delete Receipt Images**

3 You can use the **Details** drop-down menu to:

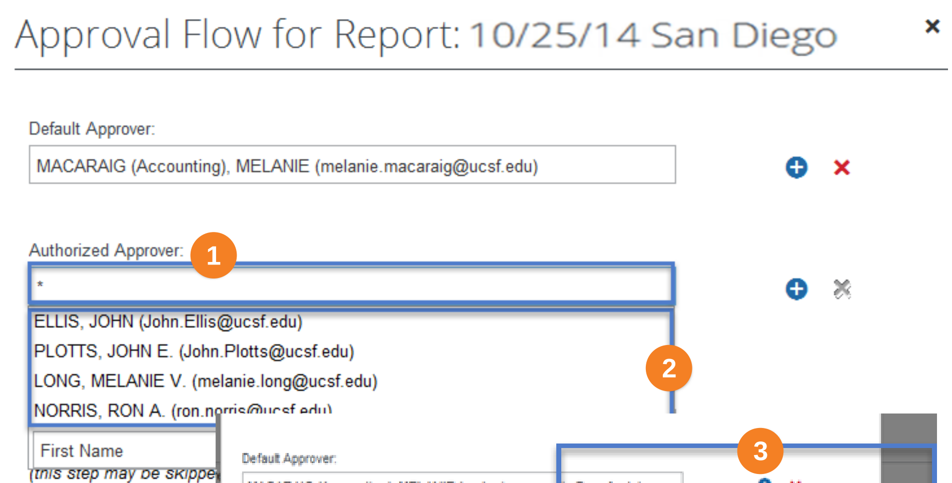
- Review the **Report Header** including **Dept ID (Cost Center)**, **Fund**, **Project**, **Activity Period**, **Function**, **Flexfield** (if applicable), or **SpeedType** used
- Enter a comment by selecting **Comments**

4 After you have reviewed the report, if you determine that an additional approval is required or would like to review the approval workflow, click the **Approval Flow** link from the **Details** menu. Follow the next section to view workflow or add approvers.

If additional approval is not required, you can:

- **Send an Expense Report Back to an Employee for Correction** (see page 6)
- **Deny Without Adjusting Workflow** (see page 6), or
- **Approve an Expense Report Without Adjusting Workflow** (see page 7)

Viewing and/or Adding Approval Workflow Steps

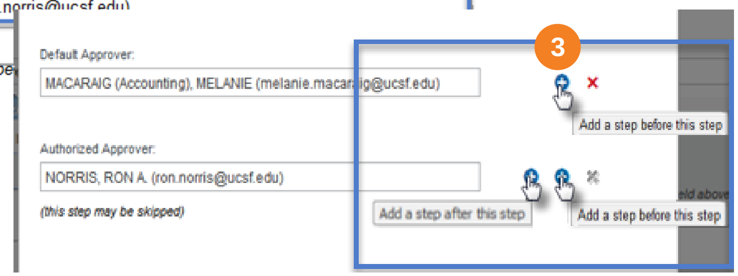


1. Use the Authorized Approver field to enter the **Name**, **Email Address**, or **UCSF Employee ID** of the approver you need to add. If you do not know who the Authorized Approvers are for the current report, enter an **asterisk** (*) in this field and the valid available choices will display
2. Click the desired Approver from the list of search results

If **additional approval** is required, there are several options:

- Add one or more approvers **before** the designated Authorized Approver
- Add one or more approvers **after** the designated Authorized Approver
- Approve and Forward to a **single** additional Approver

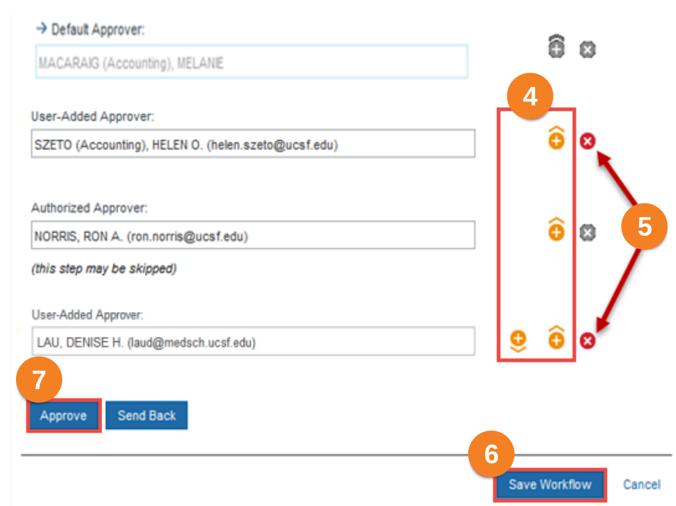
Adding Approvers before or after the designated Authorized Approver



3. Click the icon to add an additional Approver. Search for, or enter the name of the additional Approver.
   Hint: hover your mouse pointer over the icon(s) to display a tool tip message that explains where the additional approval will occur (see examples).
   For this example we chose to insert an additional Approver ***before*** the Authorized Approver and an ***Exceptional Approver*** after the Authorized Approver)

   Repeat step 3 to add additional Approvers as necessary.

   To add an **Exceptional Approver,** click the "Add a step after this step" icon next to the Authorized Approver entry box.

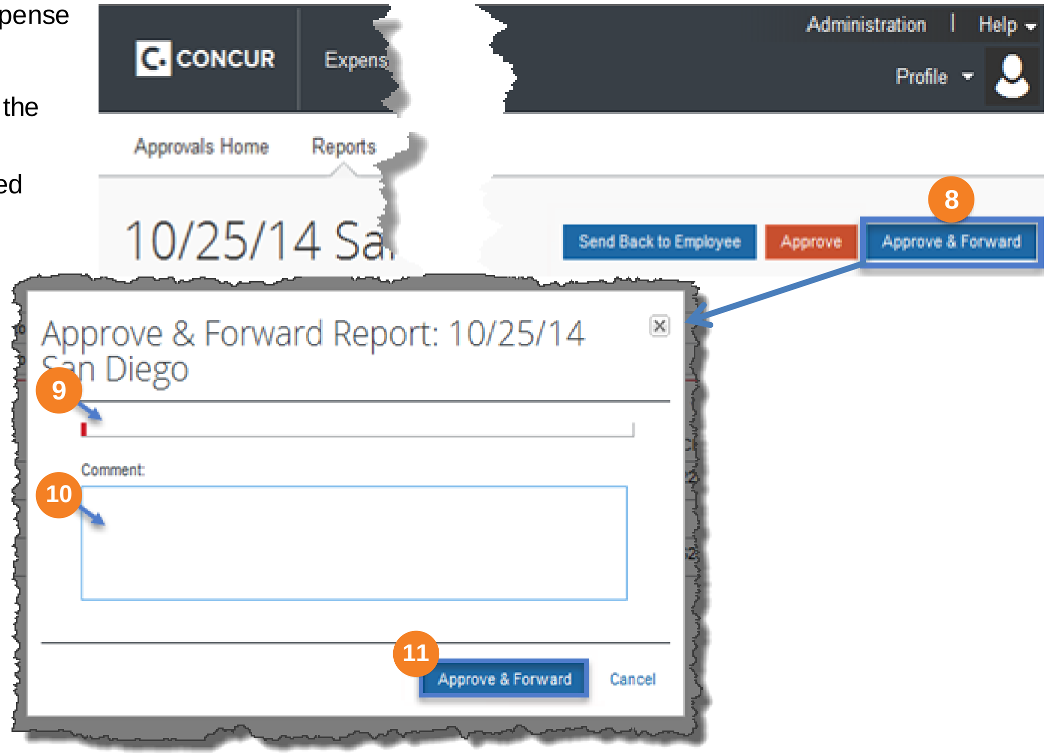


4. After all approvers have been added, use the icon to move the selected Approver up in the workflow, or the icon to move the selected Approver down in the workflow; make as many adjustments as necessary
5. Use the icons if you need to remove an added Approver
6. Once all required Approval workflow changes are complete, click the **Save Workflow** button **or**
7. If you are ready to approve the report from this screen, click the **Approve** button

Approving and Forwarding an Expense Report to One Additional Approver

You can approve and add a single additional approver by forwarding the Expense Report:

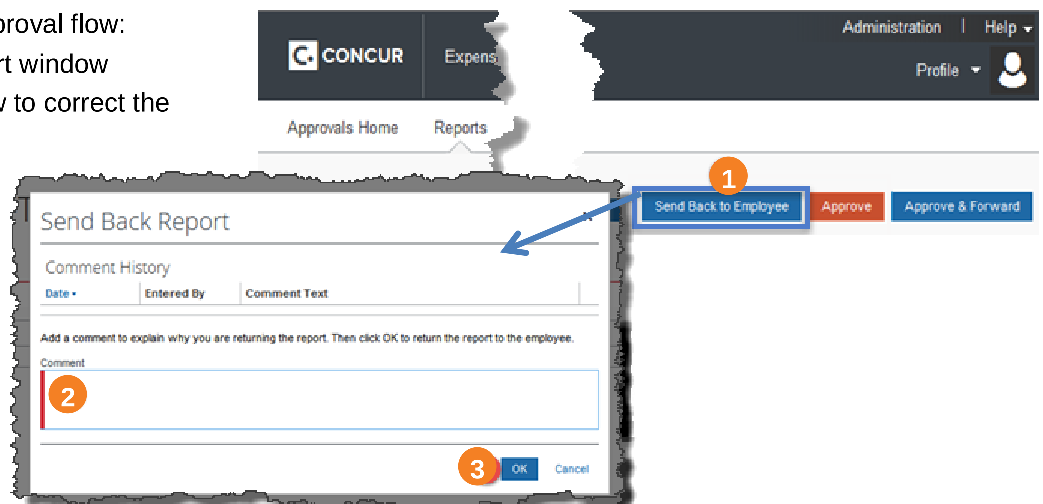
8. Click the **Approve & Forward** button in the upper right-hand corner of the Expense Report view
9. Enter the **Name**, **Email,** or **UCSF Employee ID** to search for the desired additional Approver and select their name from the search results list
10. (Optional) Enter comments if desired
11. Click the **Approve & Forward** button



Send an Expense Report Back to an Employee for Correction or Denial *without* Adjusting Workflow

To send an Expense Report back to the employee **without** adjusting the approval flow:

1. Click the **Send Back to Employee** button in the upper right of the report window
2. Enter a comment in the **Comment** field to instruct the employee on how to correct the report, or provide a justification for denying the report
3. Click **OK** to send the report back to the employee

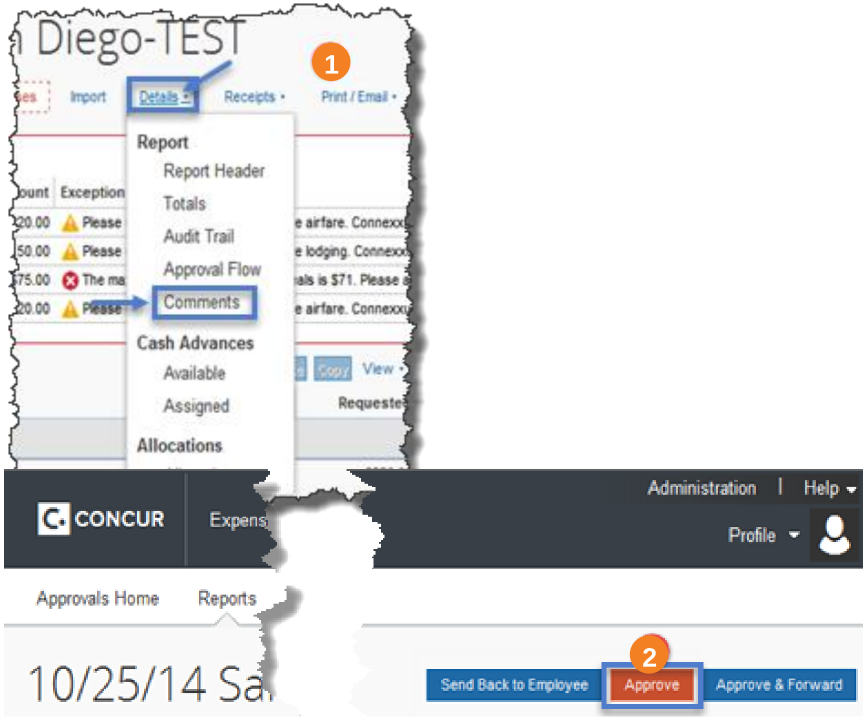


Approve an Expense Report without Adjusting Workflow

To approve an Expense Report **without** adjusting the approval flow,

1. (**Optional**) Comments must be entered **prior to approval.** To enter an optional comment, go to **Details** > **Comments** from the Expense Report review page and select **Comments**.

2. Click the **Approve** button in the upper right of the report window



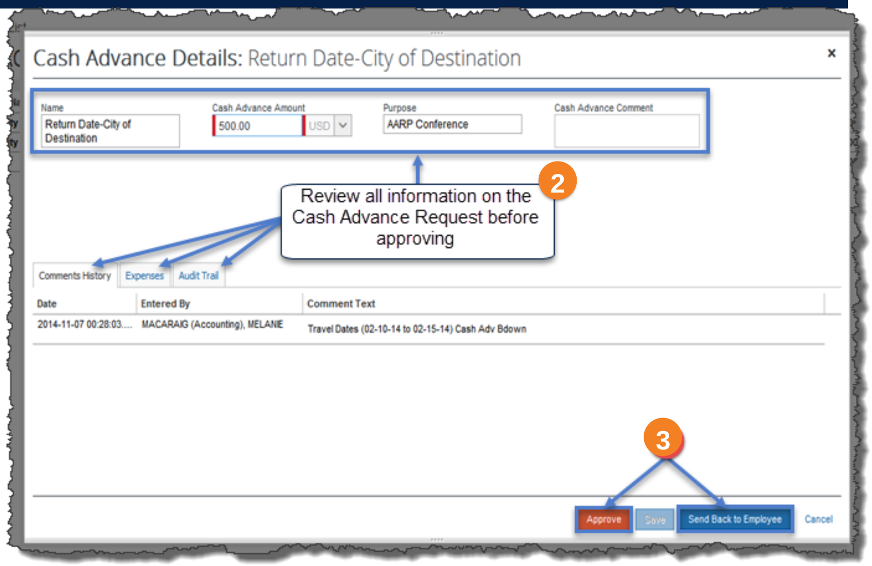
Approving or Sending Back Cash Advances

1. To view a Cash Advance request, follow the section entitled **Accessing an Expense Report or Cash Advance for Review** (on page 3) using the **Cash Advances** tab rather than the **Expense Reports** tab

2. Review all information on the **Cash Advance Details** page and decide whether to **Approve** or **Send Back** the request

3. To approve the request, click the **Approve** button

   To send the request back to the employee for revision or as notification of denial, click the **Send Back to Employee** button. Follow steps 2 and 3 of the **Send an Expense Report Back to an Employee for Correction or Denial without Adjusting Workflow** section on page 6.



More information on **MyExpense** is available on the [Supply Chain Management website](#).