# Submitting Your Expense Report in MyExpen$e

UCSF Expense Reimbursement Solution

This job aid provides step-by-step instructions on how to:

- Route your Expense Report to your default approver
- Route your Expense Report to an alternate approver
- Selecting a Default Approver
- Add an additional or exceptional approver (user-added approver)
- Submit your Expense Report
- Recall an Expense Report still pending approval

MyExpense Workflow

Required by system
Department driven option
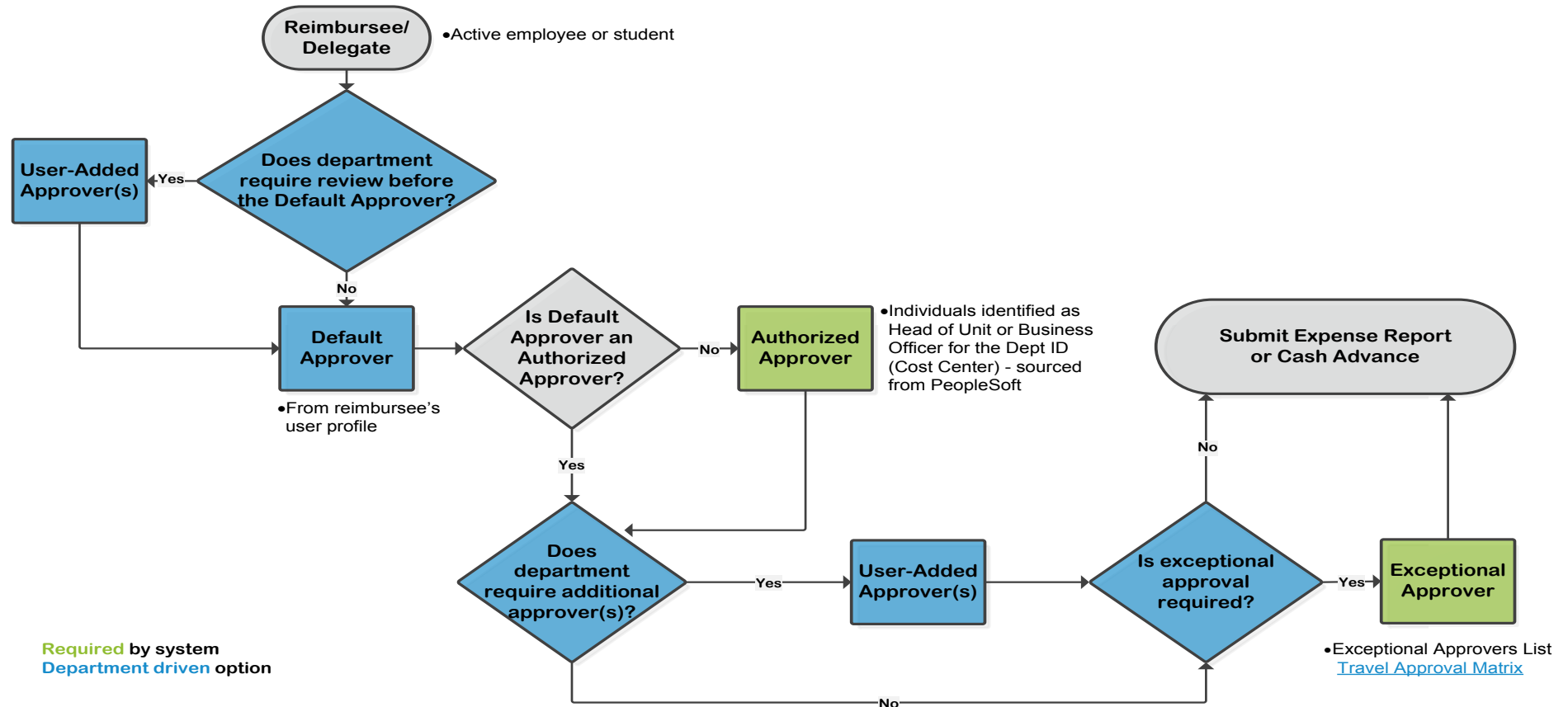
MyExpense Approver Role Definitions

Default Approver	Reviews the Expense Report prior to the Authorized Approver. If the Default Approver is also an Authorized Approver, another Authorized Approver is not required
User-Added Approver	Users may add this approver between the Default Approver and Authorized Approver. This role optional. The addition of a user-added approver is determined solely by the MyExpense user and/or his or her department; it is not required by the system.
Authorized Approver	The Authorized Approver provides final approval and authority over the submitted Expense Report

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Logging into MyExpense

Login to MyAccess at http://myaccess.ucsf.edu (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. The remainder of this job aid assumes that you have already created an Expense Report. If you need information on how to create an Expense Report, see the job aids **Creating an Expense Report** or **Creating an Expense Report for a Non-Employee** available on the **Campus Controller's Office** website.

Begin the Submission Process

All report *exceptions must be cleared* before you submit your Expense Report.
For more information regarding clearing exceptions see the **Clearing Expense Exceptions** section in the **Creating an Expense Report** job aid.

1 To begin the submission process, click the **Submit Report** button in the upper right-hand corner of the expense report.

2 The **Final Review** screen displays. Review the **Certification.**

3 Review the list of attached receipts. Use the **Attach Receipt Images** button if you need to attach additional receipts.
See the job aid **Adding Receipts in MyExpense** if you need more detailed instructions.

4 After you have completed your review, click the **Accept & Submit** button

Travel & Reimbursements – MyExpense Job Aid   Revised October 2015

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Default Approver Selection

1 The **Default Approver** you assigned in your **MyExpense** profile displays automatically and is responsible for reviewing the Expense Report prior to the Authorized Approver. *If the Default Approver is correctly identified for this report*, you can click the **Submit Report** button to continue.

*Note: in some cases, the Default Approver from your profile **may not be authorized** to approve expenses for the Dept ID (Cost Center). In these cases, you receive an error message and you will need to enter an **Authorized Approver** (page 4) before you can submit your report.*

You must identify an approver before the expense report moves on to the next workflow step. Type the first letter(s) of the search criteria (approver's name, email address, etc.). Then, select from the resulting list.

Approval Flow for Report: 10/25/14 San

Default Approver displays

Default Approver:
MACARAIG (Accounting), MELANIE (melanie.macaraig@ucsf.edu)

Authorized Approver:

(this step may be skipped)

1 Submit Report   Save Workflow   Cancel

If your Expense Report should be approved by *someone other* than the Default Approver:

2 *Change* the **Default Approver**. Click in the **Default Approver** field and begin typing the last name of the correct approver.

3 Select the appropriate approver from the list of results

If no additional review steps are required, click the **Submit Report** button.

*Note: in some cases, the Default Approver you have chosen **may not be authorized** to approve expenses for the Dept ID (Cost Center). In these cases, you receive an error message and you will need to enter an **Authorized Approver** (page 4) before you can submit your report.*

If you do not receive an error message, continue to the **Submitting the Expense Report** section of this guide.

Approval Flow for Report: 10/25/14 San Diego

Default Approver:
KAWAK
KAWAKAMI, GAIL H. (gail.kawakami@ucsf.edu)
Search Approvers By

(this step may be skipped)

Submit Report   Save Workflow   Cancel

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Selecting an Authorized Approver

The **Authorized Approver** has the authority to approve expenses for a given Dept ID (Cost Center).

1 If you know the name of the **Authorized Approver** for the Dept ID (Cost Center), you can search by entering the last name in the **Authorized Approver** field. Otherwise enter an asterisk (*) to return a list of all valid authorized approvers for the Dept ID (Cost Center).

2 Select the appropriate **Authorized Approver** from the search results

If no additional review steps are required, click the **Submit Report** button (not shown) and continue to the **Submitting the Expense Report** section of this guide.

Approval Flow for Report: 10/25/14 San Diego-TEST

Default Approver:
MACARAIG (Accounting), MELANIE (melanie.macaraig@ucsf.edu)

Authorized Approver:
*
RODRIGUEZ, ANN L. (arodriguez@finance.ucsf.edu)
KAWAKAMI, GAIL H. (gail.kawakami@ucsf.edu)
ELLIS, JOHN (John.Ellis@ucsf.edu)
PLOTTS, JOHN E. (John.Plotts@ucsf.edu)
LONG, MELANIE V. (melanie.long@ucsf.edu)
NORRIS, RON A. (ron.norris@ucsf.edu)
Search Approvers By

Adding Additional Review Steps (User-Added Approvers)

1 If your department requires additional review *prior* to the **Default Approver**, click the "Add a step before this step" icon ( ) to insert an additional, user-added approver.

   Note: User-added approvers may be added as additional reviewers in the workflow; approval by the **Authorized Approver** is still required for every report.

2 Click in the **User-Added Approver** field and search for the additional approver by typing their last name

3 Click the appropriate additional approver's name from the list

4 Users must also add an **Exceptional Approver** *after* the **Authorized Approver** when required by policy. An exception warning will display on the expense line that requires exceptional approval:

   ⚠ The expense exceeds the per person limit. Exceptional approval is required.

If you have an exception warning, click the "Add a step after this step" icon ( ) as illustrated and follow steps **2** – **3** to add an **Exceptional Approver**.

Approval Flow for Report: 10/25/14 San Diego

Default Approver:
MACARAIG (Accounting), MELANIE (melanie.macaraig@ucsf.edu)

Authorized Approver:
NORRIS, RON A. (ron.norris@ucsf.edu)
(this step may be skipped)

User-Added Approver:
SZETO
SZETO, ANNIE (Annie.Szeto@ucsfmedctr.org)
SZETO, CHRISTINA K. (SZETO.CHRISTINA@GMAIL.COM)
SZETO, DAVID E. (DSZETO.BM@GMAIL.COM)
SZETO, EVA (eva.szeto@ucsfmedctr.org)
SZETO, KA I. (Ka.Szeto@ucsf.edu)
SZETO, MAY Y. (MAY.SZETO@UCSF.EDU)
SZETO, SUSANA (Susana.Szeto@ucsf.edu)
SZETO (Accounting), HELEN O. (helen.szeto@ucsf.edu)
Search Approvers By

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Submitting the Expense Report

1 After approvers have been identified, click the **Submit Report** button

2 Review the amounts displayed in the report summary window and, when finished, click the **Close** button

Recalling an Expense Report Still Pending Approval

1 If an Expense Report is in **Submitted & Pending Approval** status, you can recall it to make adjustments. Access the Expense Report by clicking on it from the **Expense > Manage Expenses** section of the **MyExpense** Home Page and click the **Recall** button on the upper-right of the Expense Report window.

The Expense Report status displays in the users **Active Reports** view on the **MyExpense** home page. The display includes the report submitted date (actually the *creation date* of the expense report), Expense Report name, dollar amount, and current Pending Approver.

More information on **MyExpense** is available on the Campus Controller's Office website: http://controller.ucsf.edu/travel/myexpense/