ADMINISTRATIVE PROCEDURE FOR SUBMITTING EXPENSES

1. Traveller/Delegate completes expense claim.
   - Traveller has default approver 1 (fund manager) and default approver 2 (immediate supervisor) set up in their profile.

2. If claim is outside of default approvers, traveller should modify the approval flow, prior to submitting report, to ensure required approvers are selected. By clicking the + sign or the x, approvers can be added or removed, and the workflow can be saved.
3. The report can then be submitted if all other criteria have been completed (receipts, within policy, etc.).

4. Compliance Officer checks approval queue and reviews the document for conformity to the University policy (this step comes after step 5 in some faculties/services).
5. Fund Manager and Immediate Supervisor (if applicable) approve (see Appendix A).
6. Banner Approver checks the approval queue, views the report in Concur in read-only mode and approves the document.

**NOTE:** This administrative procedure is a suggestion that has been adopted by many faculties and services. Your faculty or service may have their own procedure.
APPENDIX A – APPROVAL PROCESS
APPENDIX B – SELECTING A FOAP

To search for a fund by fund owner name:

- Click on the drop-down menu.
- Select the radio button “Text”.
- Type an asterisk (*) in the appropriate field. Then, start typing the name/text (see below).