HOW TO CREATE AN EXPENSE REPORT OR A REQUEST AS A DELEGATE

Proceed by working on the expense report as usual (see How to Create an Expense Report — Detailed). Once you have completed all the steps required to create an expense report, you will have the option to Notify the employee. As a delegate, you do not have the ability to submit a report or a request for a traveller. The traveller must be the one that submit the report and electronically agree that all the expenses are exacts and comply with the University policy.

MISSING RECEIPTS AFFIDAVIT: A delegate cannot create a missing receipt affidavit. Notify the individual that their expense report is ready except for one missing receipt. If necessary, provide them with procedures on submitting the missing receipt affidavit (See How to Attach a Missing Receipt Affidavit in the User Guide - Traveller).

To return to your own profile:

- Click Acting as.
- Click Done acting for others.

When the screen refreshes, you will be back to your own account and the “Acting as” drop-down will change back to “Profile.”