

How to Approve an Expense Report

Approvers in the workflow will have three choices when approving expense forms. The report can either be approved, approve and forward the report to an off-path approver or return the report to the employee for corrections or additions.

Review and approve an expense report:

1. Go to www.ers.psu.edu and select Login.
2. On the Concur Central Screen, there are two ways you might see what reports are awaiting your approval:
 - a. Under Expense Reports on the Concur Central screen, click Approve Expense Reports and select the name (link) of the form to be reviewed. *OR*
 - b. In the My Work section of the Concur Central Screen, select the name (link) of the form to be reviewed.
3. From the links at the top of the Expense List screen:
 - a. Select Report **Header** to review the details of the form header.
 - b. Select the **expense type** (link) to review an expense detail.
 - c. Select Cancel to return to the Expense List screen.
4. Select the **View Receipts** link on the right above the list of expenses to verify all receipts have been imaged and linked to the report.
5. Select **Approve** on the Expense List screen to approve the expense report.

Send a Form Back to the Employee

To return a form to the employee for correction:

1. On the Expense List screen, click **Send Back to Employee**.
2. Enter a comment explaining the reason for returning the form.
3. Click **OK**. The report is returned to the employee.

Approve and Forward to an Off-Path Approver

Expense reports may be approved and then forwarded to an Off-Path Approver (someone who is not in the electronic workflow approval path). Anyone in the University can be an off-path approver -- they can Review and Approve an expense form "as is" or send the form back to the employee for modification and resubmission.

1. From the Expense List screen, select **Approve and Forward**.
2. At the Approval Flow page, use the Employee Helper pane to search for the off-path approver.
3. Select the appropriate name from the search results.
4. Select **Approve**.

After approval by an off-path approver, the report will return to the workflow approval path and move to the next workflow approver.