As a $0 Reviewer or Approver, you are responsible for ensuring the following requirements are met when approving an expense report:

1. All expenses are appropriate and allowable per department and University policy
2. A sufficient business purpose has been entered
3. Correct charging instructions have been entered
4. All required receipts have been provided

1. Open the Approval Notification email instructing you to approve an expense report. (see step #2 below)
   Note: You may also log in through the Yale Portal (http://portal.yale.edu) to approve expense reports. Upon logging in, navigate to the Notifications section of the EMS Homepage. Use the drop down menu to view To Do Notifications and select the report that you want to approve. Continue to step #2.

2. Review the summary of the expense report in the email

3. Click the Expense Report Details link to view details of the employee’s expenses. The Expense Report Details page displays
Review the General Information section of the expense report to view important information such as the Business Purpose, Cost Center, Start Date, and end Date, ER Name, Report Total, and Reimbursable Amount.

The Expense Report Details page has 5 tabs containing information about the employee's expenses.
Review the **Expense Lines** tab. The **Expense Lines** tab contains a detailed listing of all expenses, including whether a receipt is required. Required receipts can be viewed by clicking the **View** link next to **Attachments** at the top of the page.

Click the **Details** icon to view additional details about each expense, including the itemized charges.
5b Click the Expense Allocations tab to review charging instructions for each expense to ensure they are correct and appropriate.

5c Click the Weekly Summary tab to view a weekly expense summary by Expense Types.

5d Click the Approval Notes tab to view notes from other approvers regarding the expense report.
5f Click the **Approvers** tab to view all approvers for the expense report.

<table>
<thead>
<tr>
<th>Order No</th>
<th>Approver</th>
<th>Category</th>
<th>Status</th>
<th>Approval Class</th>
<th>Approval Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Darden, Eric</td>
<td>Approver</td>
<td>Notified</td>
<td>cost center</td>
<td>55511.55</td>
</tr>
</tbody>
</table>

6 Close the Expense report details page. Scroll to the bottom of the Approval email (shown below) and select the appropriate action by Approving, rejecting, or requesting More Information. If you Reject the expense report, provide an explanation between next to the Note field. Ensure the Note is in between single quotes.

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**Action History**

<table>
<thead>
<tr>
<th>Num</th>
<th>Action Date</th>
<th>Action</th>
<th>From</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>16-Apr-2013 14:31:18</td>
<td>Submit</td>
<td>Darden, Eric</td>
</tr>
</tbody>
</table>

**Related Applications**

- Expense Report Details

Please click on one of the following choices to automatically generate an email response within quotes.

**Action**: Approve  Reject  Request Information

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**Note**: Do not remove this NID - Expense Report ID number. Oracle requires this number to track your expense statement transactions. Do not remove it!

Note: Approvers do not have the ability to edit expense reports in iExpense incorrect information that appears on an expense report will need to be rejected so that the preparer can correct and re-submit.
If you wish to **Transfer** the expense report you must do so by logging into the EMS system. The person to whom you transfer the report will have the ability to run approval reports at your approval threshold (for example, if you have a 10K approval level and the other approver has a 1K approver level, he or she will assume your 10K approval threshold for this specific expense report only.

There are instances where you may want to use **Request Information** to garner details about the expense report from the Preparer. For example, an expense report may contain the appropriate expenditure type and charging instructions but may not include the 5 Ws for the business purpose. A note to the Preparer using Request Information can clarify the report without having to reject it.

*The **Response Note** field can hold up to 240 characters. Please enter a brief communication in the field. If you are uncertain about the number of characters you’ve entered, use the MS Word Word Count functionality, then copy and paste your comment into the expense report.*

<table>
<thead>
<tr>
<th>Type of Questions</th>
<th>Who to Contact</th>
<th>Contact Information</th>
</tr>
</thead>
</table>
| Log-in                            | ITS Help Desk        | **Hours:** Monday - Friday 7:00 AM - 9:00 PM  
**Phone:** 203.432.9000  
**Email:** helpdesk@yale.edu |
| Password                          |                      |                                                          |
| System Functionality              |                      |                                                          |
| P-T-A-E-O                         | Yale Shared Services | **Hours:** Monday - Friday 8:00 AM - 5:00 PM  
**Phone:** 203.432.5394  
**Email:** yss.ems@yale.edu |
| VIP                               |                      |                                                          |
| Policy & Procedure                | E-Commerce           | **Scott Lucker, Associate Director E-Commerce**  
203.436.4184  
scott.lucker@yale.edu  
**Kathy Chambers, Manager, E-Commerce**  
203.432.9977  
Katherine.chambers@yale.edu |
| Deployment                        |                      |                                                          |
| Transition from Concur to EMS iExpense |                |                                                          |
| New access requests               |                      |                                                          |