Pre-Approvals are used to acquire pre-authorization for expenses and travel that require prior approval before being incurred (i.e. Individual Memberships and International Travel). Pre-Approvals do not post to the department's budget.

I. Creating a Pre-Approval:

a. If you are assigned as a delegate to one or more people, make sure you are in the correct account before starting the expense report. You are working as whoever's name is showing in the upper right hand corner of the screen.

b. From the Dashboard, tap the **+NEW** button in the upper right corner and select **NEW PRE-APPROVAL REPORT** from the drop-down menu. The Pre-Approval Header Screen appears.

- i. The Report Name should be specific to the business purpose of the pre-approval request.
- ii. The dates should be the start and end dates of the trip or individual membership.
- iii. The Business Purpose should resemble the Report Name – with more details if necessary.
- iv. Trip Type helps direct the approval routing process
  1. If the Pre-Approval is for International travel, choose International.
  2. If it is for an individual membership, choose Non Travel.
- v. The City, State, and Country fields are not required, but are recommended if the pre-approval is for travel.
- vi. The allocation or index for Pre-Approvals is on the header instead of the individual expense(s). Remember this will not post to any budget, it is only to get the correct approval routing.
- vii. Click **Save** (at the top).
- viii. If the Add Pre-Approval Types screen does not pop up, click on the plus sign with a circle around it.
  1. Choose the expense type that needs the pre-approval. Multiple expense types can be added to a pre-approval. Please make sure to group related pre-approval expenses together because each Pre-Approval can only be used once, and an expense report may only have one Pre-Approval linked to it.
- ix. After selecting the expense type, the expense entry form appears.
  1. Enter the estimated amount and detailed description or business purpose
  2. Click Save. The expense is now added to the pre-approval on the left half of the screen.
- x. Once you are done adding your expense types and estimated amounts, you may go back to the header to attach documentation. Documentation is not required for Pre-Approvals, but many approvers might refuse to approve the pre-approval without backup documentation.

1. To add documentation click on the Pre-Approval Report Name on the left side of the screen; this will bring the Pre-Approval Header up on the right half of the screen.
2. Scroll to the bottom of the header, where you see "Attachments" and add all your documentation.

xi. When you are finished with the Pre-Approval, click **Submit** at the bottom of the report and then click **Submit** again for the Submit Confirmation at the top of the right half of the screen.

c. Once submitted, the Pre-Approval will follow the necessary approval chain.

d. Any Pre-Approval reports returned by an approver, will need to be corrected and re-submitted.

e. Until the Pre-Approval is completely approved by all necessary approvers, you may Recall the report back to Draft status to change, add, or delete any Pre-Approval types or to delete the whole report if it is no longer necessary.

f. To Save or Print a PDF copy of the Pre-Approval report for your records go to the Submitted Pre-Approvals, select the report you want, and then click on PDF on the right half of the page.

II. Linking a Pre-Approval to an Expense Report:

a. Once the Pre-Approval is completely approved, it will be available to link to the expense report that includes the actual expenses related to the pre-approval.

b. When the draft of the expense report with the expenses related to the pre-approval is ready to be submitted, you can link the Pre-Approval to the expense report in one of two ways.

i. Click on the Report Name to bring up the expense report header and scroll down until you see Add Pre-Approval Report.

1. Click Add Pre-Approval Report and then choose the pre-approval that corresponds with the expense report and click Apply.

ii. The other way to link the Pre-Approval is when you submit the expense report.

1. When your expense report is completed and you click submit at the bottom of the report, the Submit Confirmation screen comes up on the right half of the page.
2. Between Cancel and Submit, is a Pre-Approval button. Click it and then choose the Pre-Approval that you want to link to the report and click Apply.

c. As a reminder, only one Pre-Approval may be linked to an expense report and a Pre-Approval may only be used once.

d. If you delete or recall an expense report that has a Pre-Approval linked to it, the Pre-Approval will automatically be unlinked from that expense report. The Pre-Approval will then return to the Pre-Approval list and will be available to be re-linked to a recalled expense report or be linked to another expense report.