Travel and Expense Reimbursement

Approving Sponsored Projects Services (SPS) Reports

If the expenses on a report are being charged to a sponsored Research Foundation (RF) grant, a Sponsored Projects Services (SPS) approver must approve the report.

1. Receive Email Notification
   - SPS approvers will receive email notifications when expense reports are submitted for their approval.
   - Click the link in the email to log into Concur to review and approve the report.

2. Go to Required Approvals
   - There are several ways to go to your required approvals from the home page:
     - Click Required Approvals in the Quick Task Bar or in My Tasks.
     - Click Approvals in the top menu bar.

3. Review Reports Pending Approval
   - Select a report pending approval. Click on the report name to open it.
     - Review exceptions for errors on the report:
       - If an issue needs to be corrected by the user, at the top click Send Back to User.
       - Yellow exceptions appear as informational warnings on the report, and may have no action that is required. These will not prevent you from approving the report (Figure 1).

   ![Please enter Funding Source, Entity & Account in the allocation](Figure 1)

   - Verify all expenses are fully allocated:
     - At the top of the report, click Details, then click Allocations. Click the Summary button.
     - On the Allocation Summary, verify that the account information is complete for all expenses.
   - Review the report header and mark that you reviewed the report:
     - Click Details, then click Report Header:
       - In the SPS Reviewed field, select Yes to indicate that you reviewed the report (Figure 2).
       - In the Federally Funded Account field, select Yes to indicate that it is a federally funded account, or select No if it is not (Figure 2).
     - When done, click Save.

4. Approve or Return Report
   - When you are finished reviewing the report, at the top choose one of the following options:
     - Send Back to User — send the report back to the user if it requires correction. In the comment field, provide a clear explanation of the problem.
     - Approve — approve the report if the expenses are allowable and fully allocated. Read the Final Confirmation statement and click to Accept or Decline.

For travel and expense system support, email ubs-travel-expense-support@buffalo.edu