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
   - As an SPS approver, you will receive email notifications alerting you to expense reports that have been submitted for approval.
   - Periodically check the junk folder in your email in the event that approval emails were inadvertently sent there.

2. Access Required Approvals
   - Log into Concur. There are several ways to access required approvals from the home page:
     - Click **Required Approvals** in the Quick Task Bar.
     - Click **Required Approvals** in My Tasks.
     - Click **Approvals** in the top menu bar.

3. Review Pending Approvals
   - Select a report pending approval.
   - Review exceptions for errors on the report:
     - If an error needs to be corrected by the user, at the top of the report click **Send Back to User**.
     - Yellow exceptions will 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).
   - Review individual expense line items on the report to verify that they are allowable expenses.
   - Hover over the allocation icon (Figure 2). Verify that all expenses are fully allocated and assigned to the correct account.
   - Review the report header for accuracy 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 3).
     - 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 3).
   - When done, click **Save**.

4. Approve or Send Back Report
   - When you are finished reviewing the report, at the top click one of the following options:
     - **Send Back to User** — return the report to the user if there is an issue they have to correct. In the pop up window, 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