

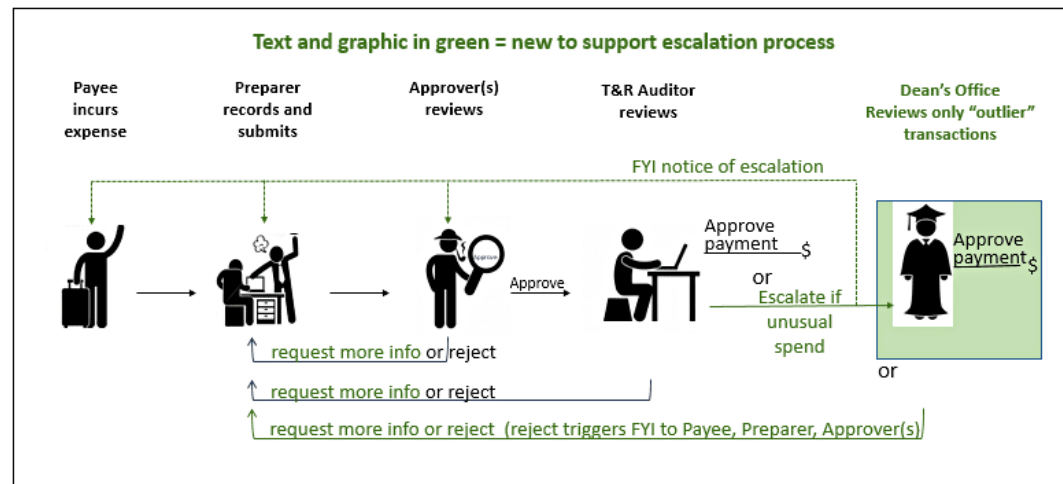
# Expense Requests Preparers – Rollout February 29, 2016

Page or scroll through, or choose what you would like to learn about below.

## 1. New Escalation Process

On February 29, 2016, Stanford rolled out a new escalation process for the approval of business expense transactions, including both Expense Requests and PCard transactions. The purpose of the new process is to allow the business unit (Dean's office or department financial management) to have visibility into and final approval of unusually high-cost business expenses.

Dean's office reviewers (called "escalation designee") have been identified by Stanford business units and assigned escalation approval authority. Escalation to the designee will **only** occur if a transaction has unusually high cost and has already been approved by all approvers in the standard approval workflow. The Travel and Reimbursement department (T&R) will escalate a transaction to the designee for final review and approval.



## 2. FYI Notifications about Transaction Escalation

When a transaction is escalated for Dean-level approval, the payee, preparer, and all approvers on the approval routing list are notified.

[FYI Notifications about Transaction Escalation](#)


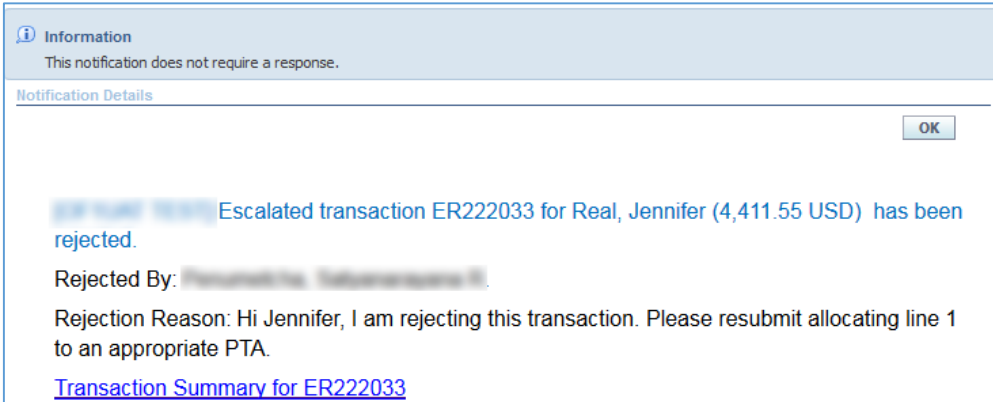
## 3. Request for More Information from Approver or Escalation Designee

Approvers and escalation designees can now request information from you (the preparer) without rejecting the transaction. You can then reply to the request directly to the approver or escalation designee without resubmitting the transaction. See below for details:

[Respond to Request for More Information](#)

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### FYI Notifications about Transaction Escalation

Item	Description	System
<p><b>FYI Notifications about Transaction Escalation for Dean-level Approval</b></p>	<p>You will be notified when a transaction for which you are the preparer is escalated.</p> <p>The notification is purely FYI – there is no further action required by you.</p> <p>If desired, you can click the link to review the transaction details, including attachments.</p> <p>You will also be notified if an escalated transaction is approved or rejected.</p>	 <p>The screenshot shows a notification window with the following content:</p> <ul style="list-style-type: none"> <li>Header: Applications Home Page &gt; Worklist &gt;</li> <li>Information icon and text: "Information. This notification does not require a response."</li> <li>Section: Notification Details</li> <li>Message: "Escalated transaction ER222033 for Real, Jennifer (4,411.55 USD) has been escalated. Open <a href="#">Transaction Summary for ER222033</a> to review transaction details. This notification is FYI only. There is no further action required by you at this time. You will be notified if more information is required."</li> <li>Footer: "Return to Worklist" link and a checkbox "Display next notification after my response".</li> <li>Buttons: "OK" buttons are present in the top right and bottom right corners.</li> </ul>
		 <p>The screenshot shows a notification window with the following content:</p> <ul style="list-style-type: none"> <li>Header: Applications Home Page &gt; Worklist &gt;</li> <li>Information icon and text: "Information. This notification does not require a response."</li> <li>Section: Notification Details</li> <li>Message: "Escalated transaction ER222033 for Real, Jennifer (4,411.55 USD) has been rejected. Rejected By: [Name]. Rejection Reason: Hi Jennifer, I am rejecting this transaction. Please resubmit allocating line 1 to an appropriate PTA. <a href="#">Transaction Summary for ER222033</a>"</li> <li>Buttons: "OK" buttons are present in the top right and bottom right corners.</li> </ul>

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### Respond to Request for More Information

Item	Description	System
<p><b>Respond to a Request for More Information from an Approver or Escalation Designee</b></p>	<p><b>Previously</b>, Expense Requests approvers could only “approve” or “reject”. If the approver needed a missing attachment or more explanation, they had to reject. Then you, the preparer, had to modify the transaction and resubmit it back through the approval workflow again.</p> <p><b>New with this release</b>, if approvers or escalation designees need a more detailed cost justification, or if a receipt or document is needed, they can send a request directly to you, the preparer, before deciding to approve or reject.</p> <p>The preparer will receive a notification that more information has been requested.</p> <ul style="list-style-type: none"> <li>• Review the <b>Message from Requester</b>.</li> <li>• <b>Click the link</b> to review transaction information and attach receipts/documents.</li> <li>• Enter a <b>Note</b> to the requester:             <ul style="list-style-type: none"> <li>• Refer to the expense lines in question by expense type and line number</li> <li>• Be sure to tell the requester if you attached documents</li> </ul> </li> </ul>	<div style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: right; margin: 0;"><a href="#">Reply</a></p> <p>More information has been requested for: Transaction ER222033 for Real, Jennifer (4,411.55 USD). You are the transaction preparer. Please respond.</p> <p>Requested by: Vaughan, Belinda. Message from Requester: Please attach receipt for Business Meal.</p> <ol style="list-style-type: none"> <li>1. Open <a href="#">Transaction Summary for ER222033</a> to review transaction details or attach documents using add receipts icon.</li> <li>2. Enter the Note below to answer questions and provide additional requested information. Be specific. Indicate in the Note if additional receipts/do</li> <li>3. Click Reply.</li> </ol> <p>Your response will be routed directly to the requester.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p><b>Response</b></p> <p>Note <input style="width: 90%; height: 30px;" type="text"/></p> </div> </div>

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Item	Description	System
	<ul style="list-style-type: none"><li>• Click <b>Reply</b>.</li></ul> <p>The approver or escalation designee will receive a notification containing your response, and can then decide to approve or reject.</p> <p><b>Important Note:</b> The <b>Request More Info</b> feature only allows the preparer to write a note and attach a document. If something about the transaction must be modified (e.g. business purpose or PTAE), you must <b>withdraw and resubmit the transaction</b>.</p>	