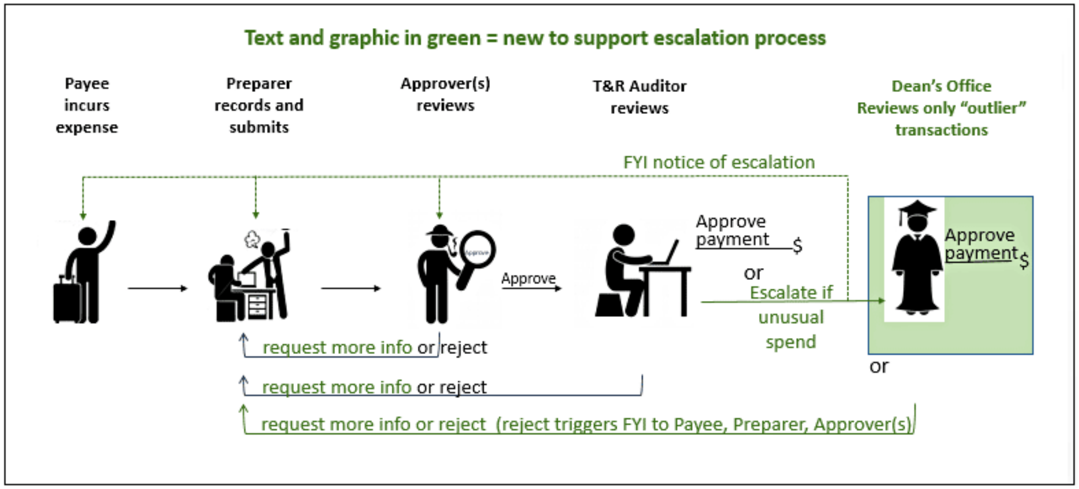
Page or scroll through, or choose what you would like to learn about below.

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 other 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.



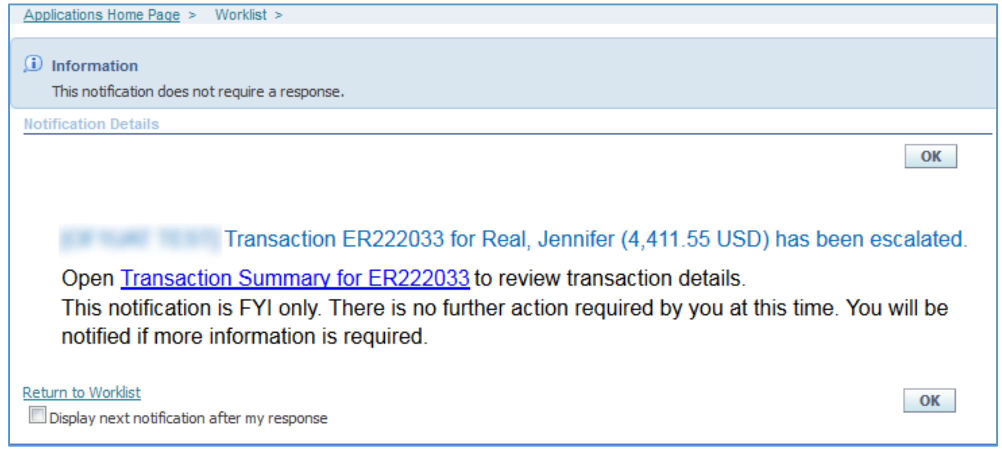
2. FYI Notification about Transaction Escalation
When a transaction is escalated for Dean-level approval, the payee, preparer, and all approvers on the approval routing list are notified.

[FYI Notification about Transaction Escalation]

3. Changes to Approval Notifications
In addition, this release includes changes to both **Expense Requests** and **PCard** approval notifications. See below for details:

[Request More Info from Expense Requests Preparer]
[Expense Type, Number of Attendees, and Messages for PCard]

FYI Notification about Transaction Escalation

Item	Description	System
FYI Notification about Transaction Escalation for Dean-level Approval	You will be notified when a transaction for which you are an approver is escalated. The notification is purely FYI – there is no further action required by you. If desired, you can click the link to review the transaction details, including attachments.	

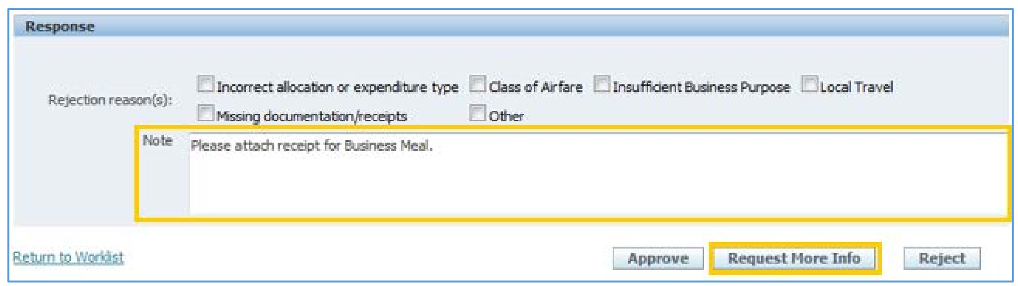
Request More Info from Expense Requests Preparer

<table>
<tr><th>Item</th><th>Description</th><th>System</th></tr>
<tr>
<td>Request More Information from Preparer while reviewing an Expense Requests transaction for approval</td>
<td>
Previously, Expense Requests approvers could only “approve” or “reject”. If there was something missing or more explanation required, you had to reject. Then the preparer had to modify the transaction and resubmit it back through the approval workflow again.
New with this release, if you need a better explanation from the preparer, or if a receipt or document is missing, you can send a request directly to the preparer before deciding to approve or reject.

Scroll to the bottom of the notification.
Enter a Note to the preparer that describes exactly what information or attachment you need.

Refer to the expense lines in question by expense type and line number
Be as specific as possible about the information or attachment needed

Click Request More Info.

The preparer will then receive a notification containing your request, to
</td>
<td>


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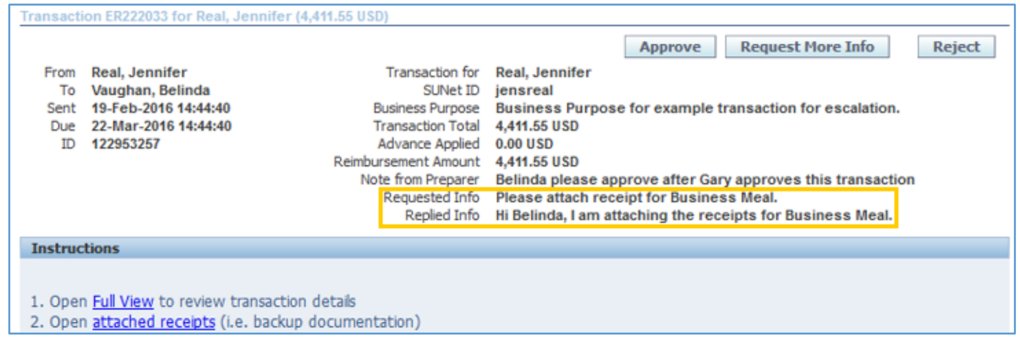
</table>

<table>
<tr><th>Item</th><th>Description</th><th>System</th></tr>
<tr><td></td><td>which they can reply directly back to you.

When the preparer replies with the information you will receive another notification to review and approve.

• Review the Reply from the preparer and any additional attachments provided

Note: The Request More Info feature only allows the preparer to write a note or attach a document. So if something about the transaction must be modified (e.g. business purpose or PTAE), you must reject the transaction.</td><td>
</td></tr>
</table>

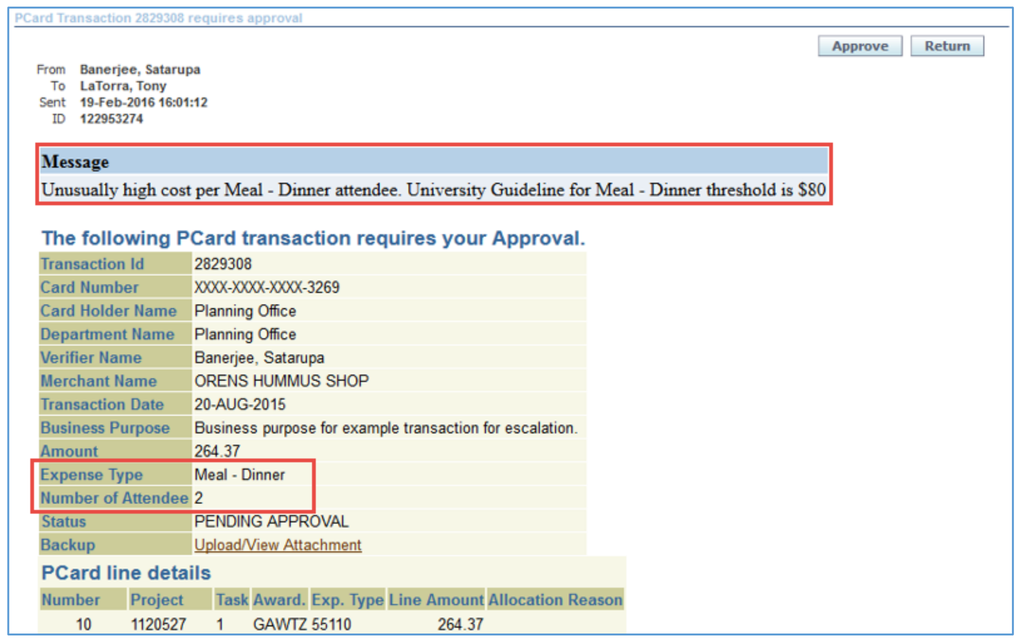
Expense Type, Number of Attendees, and Messages for PCard

<table>
<tr><th>Item</th><th>Description</th><th>System</th></tr>
<tr>
<td>Expense Type, Number of Attendees, and Messages for PCard</td>
<td>The PCard module has been enhanced to provide warnings, specifically when business meal costs exceed per-person guidelines. This capability is enabled by two new fields in the PCard verification system.

PCard verifiers will select an Expense Type from a dropdown list that includes these options:
Meal – Breakfast
Meal – Lunch
Meal – Dinner
Meal – Other
Non-meal expense
When one of the meal expense types is chosen, a second field appears and verifiers will enter the number of people in attendance at the meal.

Notifications to approvers (shown here) will include a warning message when the per-person meal cost guideline is exceeded.

Approvers should verify adequate justification for cost in the Business Purpose, attachments, and notes from other approvers, and Approve or Return as appropriate.</td>
<td>Meal Guidelines
<table>
<tr><th>Meals</th><th>Suggested Amount per Person (including tax, tip and alcohol)</th></tr>
<tr><td>Breakfast</td><td>$12 - 20</td></tr>
<tr><td>Lunch</td><td>$18 - 35</td></tr>
<tr><td>Dinner</td><td>$36 - 80</td></tr>
</table>



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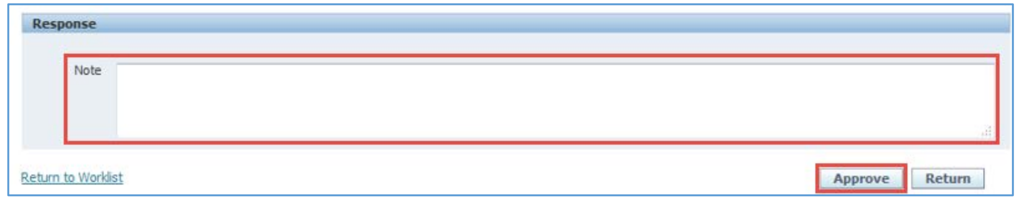
Item	Description	System
Approve the Transaction	• **Scroll** to the bottom or the notification. • Enter a **Note** that clarifies or explains why the cost is justified. • Click **Approve**. Verifier is notified that the transaction has been approved.	
Reject the Transaction	• **Scroll** to the bottom of the notification. • Enter a **Note** to further explain the reason for rejection and what must be done for approval. • Click **Reject**.