As an Approver, you can approve request and expense reports “as is”, change the coding (chartfield information), send a request or an expense report back to the employee to modify and resubmit, or Approve and Forward to another Approver. All requests and reports awaiting your approval appear on the Approvals tab. If you have verified your email, you will receive a notification when there is a request or report that requires your attention.

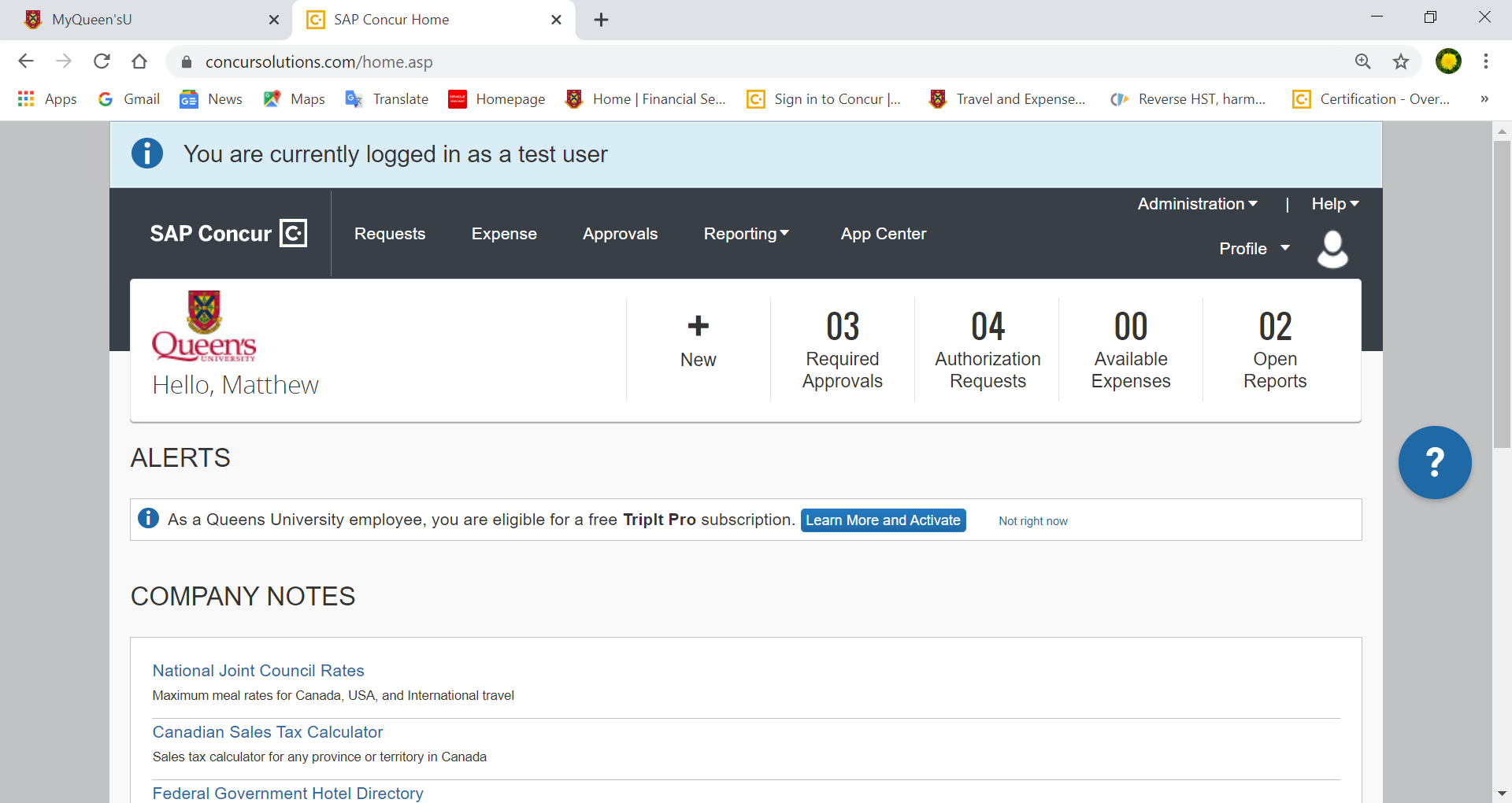
**NOTE:** The terms “Claim” and “Report” are interchangeable. This is a known issue with ERS and cannot be changed. What you see is dependent on when you were granted access to in ERS.

**Approving**

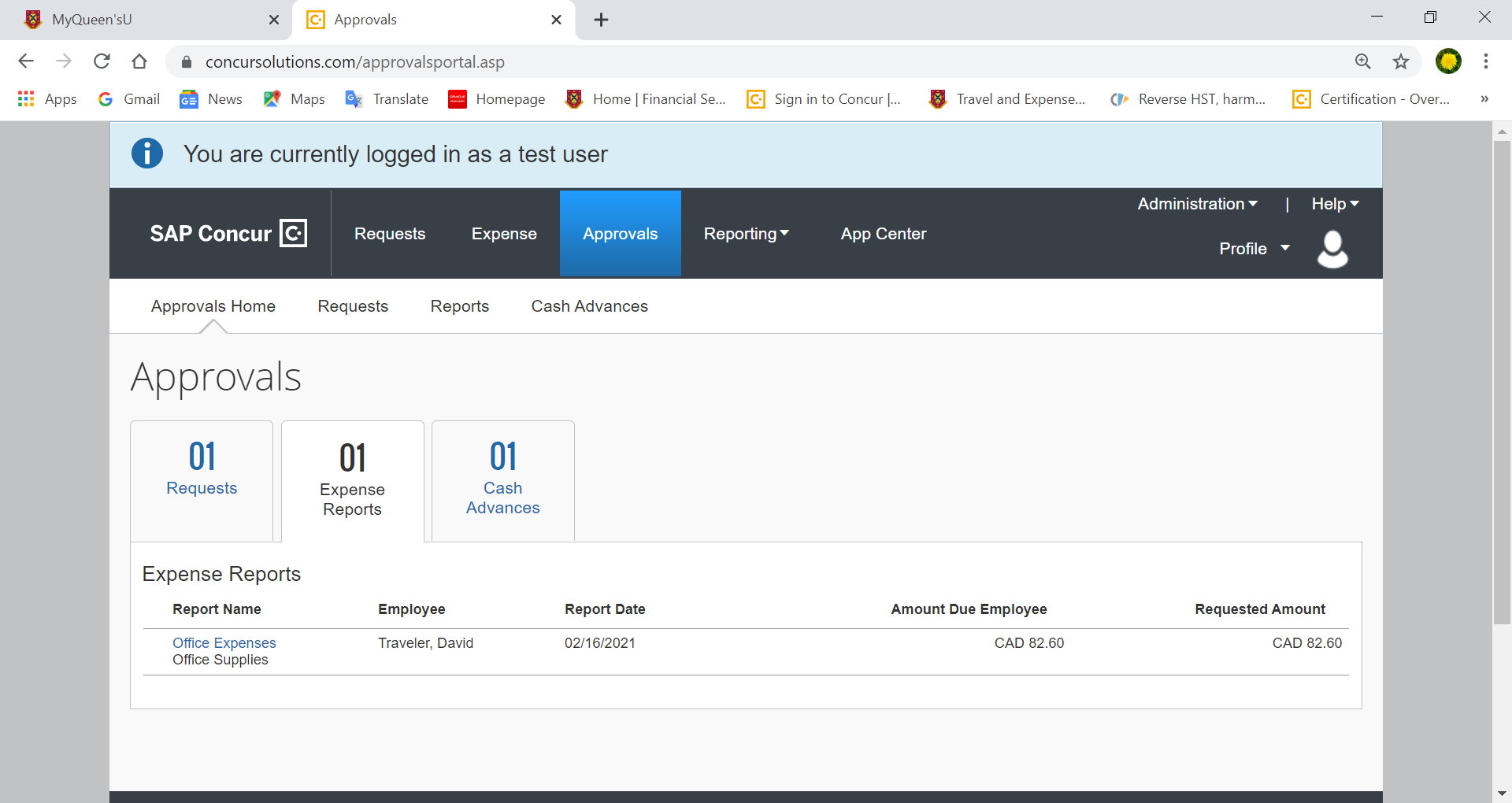
Log into ERS; for more information on how to access ERS please see the ERS First Time Users Guide.

[www.queensu.ca](http://www.queensu.ca) > Search and Sign In > MyQueen’sU – SOLUS, MyHR and more > Scroll down to Finance Applications > Expense Reimbursement (ERS)

Go to the Approvals tab.



Under the Approvals tab there will be three sub tabs.



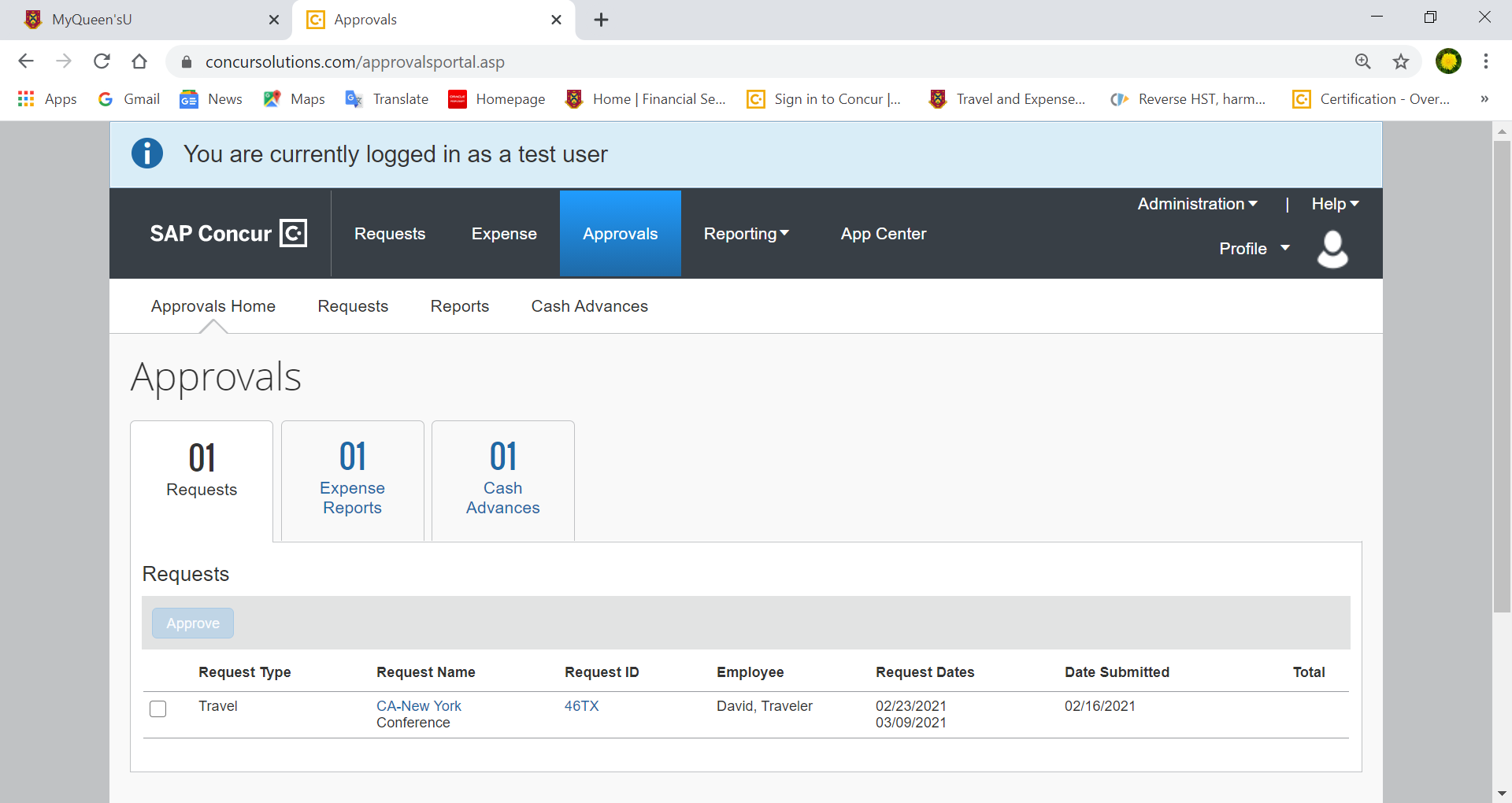
**Requests**: Includes travel and expense pre-approvals (no funds requested) and Cash Advance requests for travel and expense (funds requested).

**Expense Reports**: Includes Expense Reports for travel and expenses.

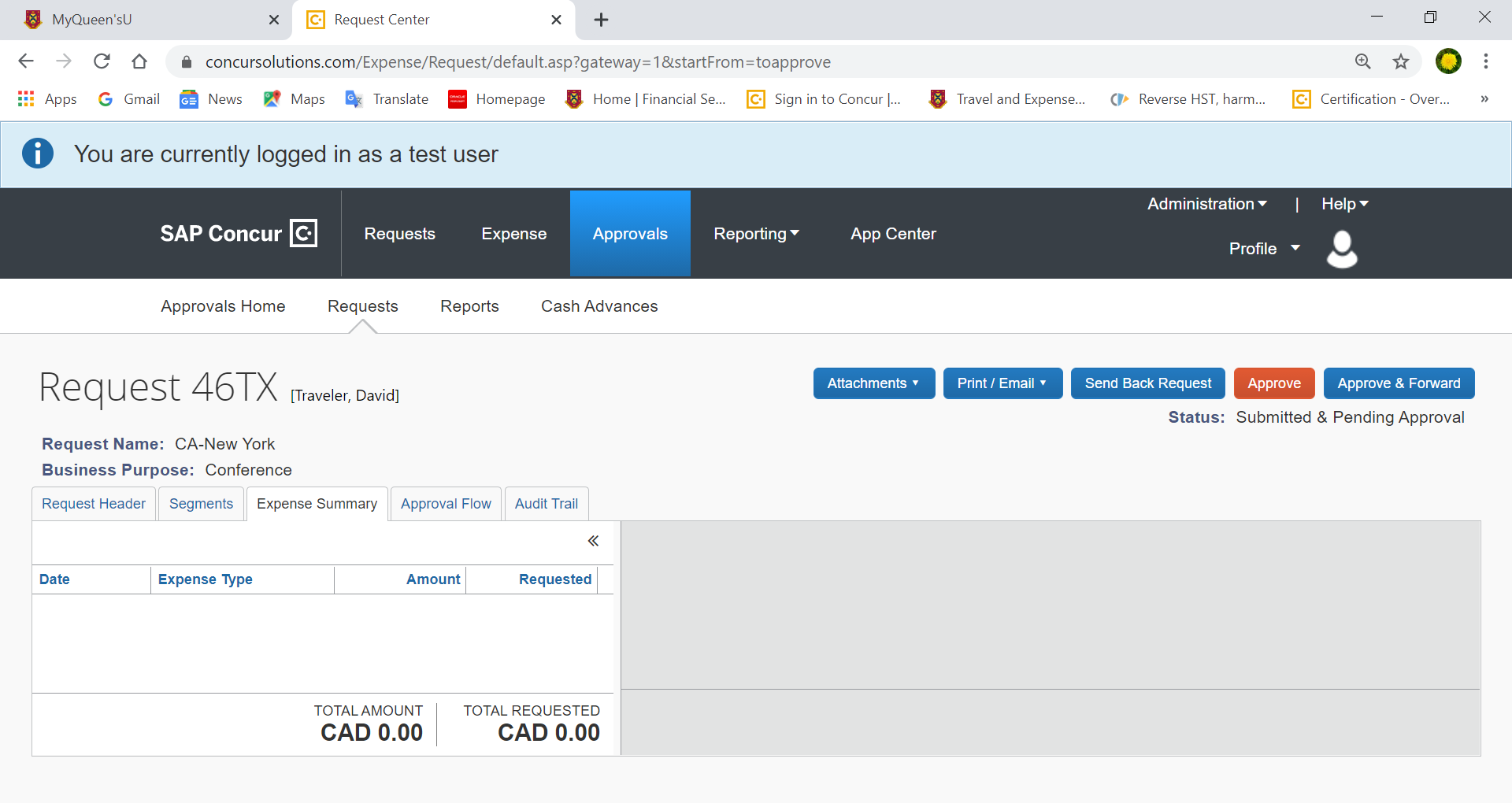
**Cash Advances**: Includes cash advance requests for Research Participant Payment Advance for research projects. This tab will only show if you have a Research Participant Payment Advance to approve.

**Request Tab**

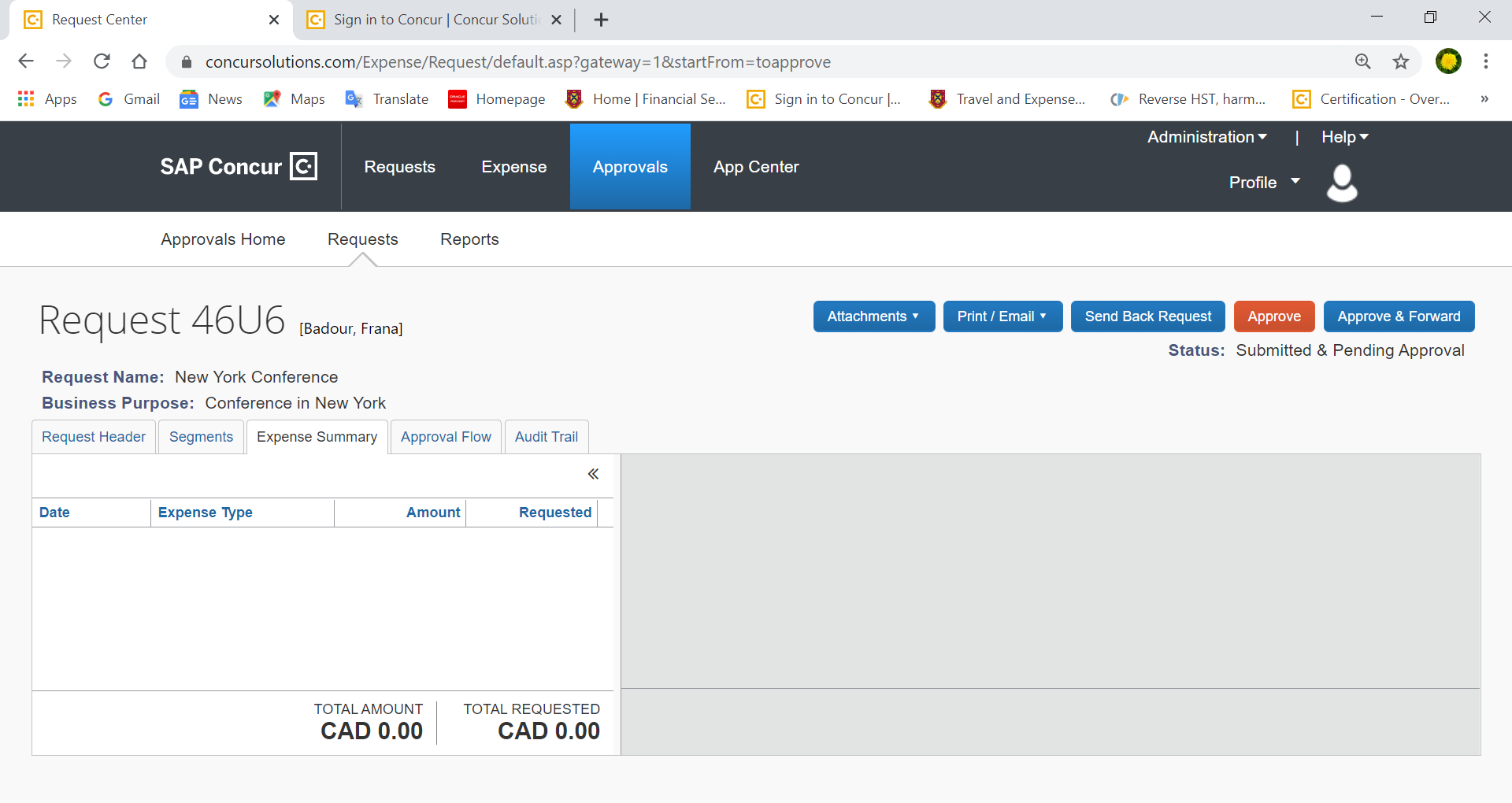
Cash Advance Pre-Approval and Cash Advance Requests.



* Click on the name of the request you want to review for approval.
* The Request will open on the **Expense Summary** tab
  + Pre-approvals: This screen will have to be completed as an explanation for the pre-approval request.
  + Cash Advance: This screen will have to be completed as an explanation for the request.
* Review the information on the **Expense Summary** tab.
* Go to the **Request Header** tab and review the information there as well.
  + Check: dates, Request-Name, Start Date and Business Purpose.
  + Cash Advance Amount: if this is a request for pre-approval this box should be empty. If this is a Cash Advance request, then an amount will have to be entered into this box.
* **NOTE:** If the **Expense Summary** tab is completed but no amount is entered in the Cash Advance Amount box on the Request Header then NO FUNDS will be issued.
* **Segments** tab is to be used for all cash requests.

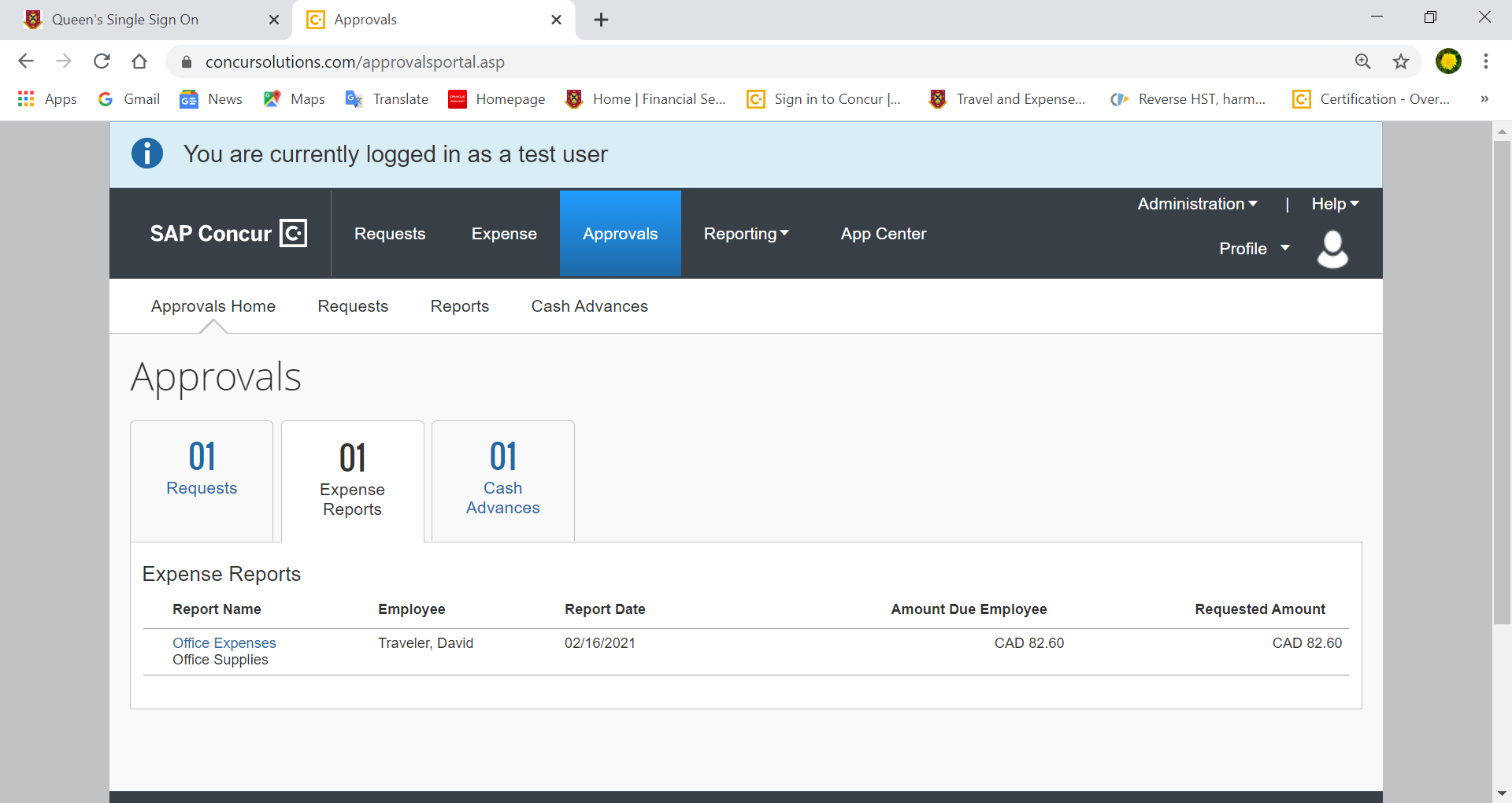


* When you have reviewed that request there are three options
  + **Send Back Request:** this is to be used if there are any issues with the request such as information or amounts missing. You will be prompted to enter a comment.
  + **Approve:** If the request meets all requirements you can approve, and it will be sent to Financial Services for final review and to be issued.
  + **Approve & Forward:** If secondary approval is needed, or if you were previewing the request select this button and then search by LAST name for the second approver.

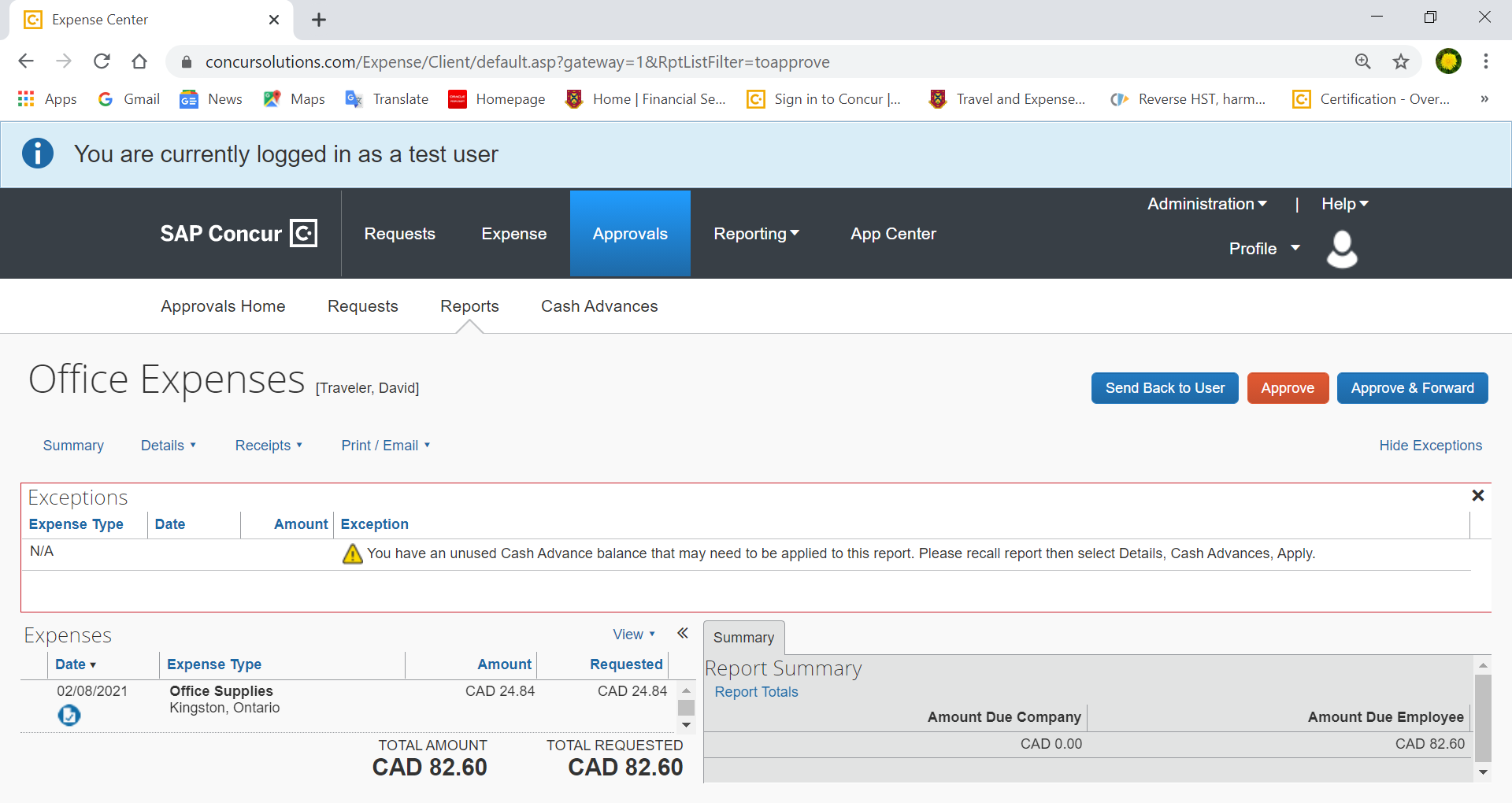


* If the requestor has verified their email address, they will be sent an email notifying them of the status of the request.

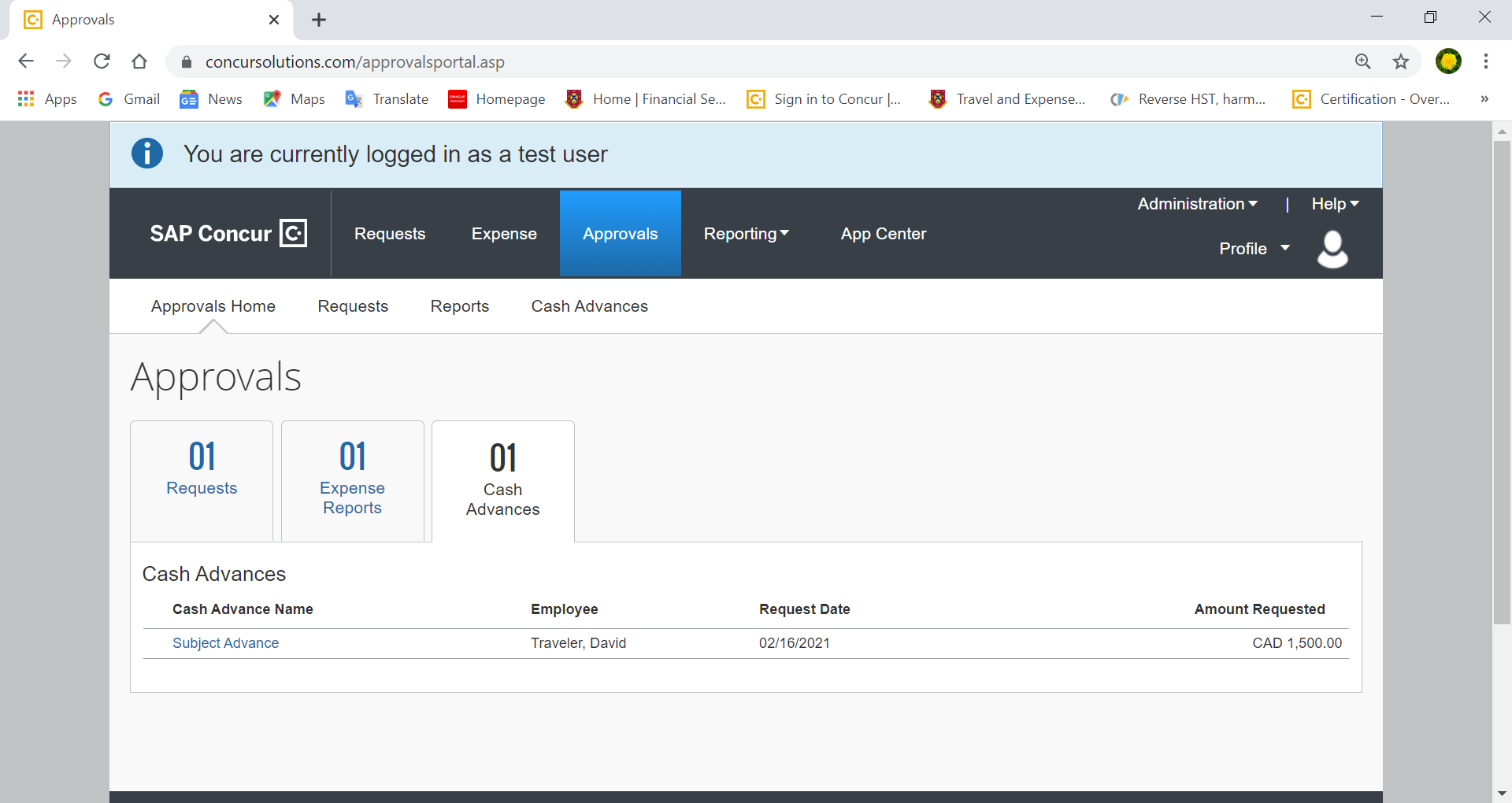
**Approving a Travel or Expense Claim**



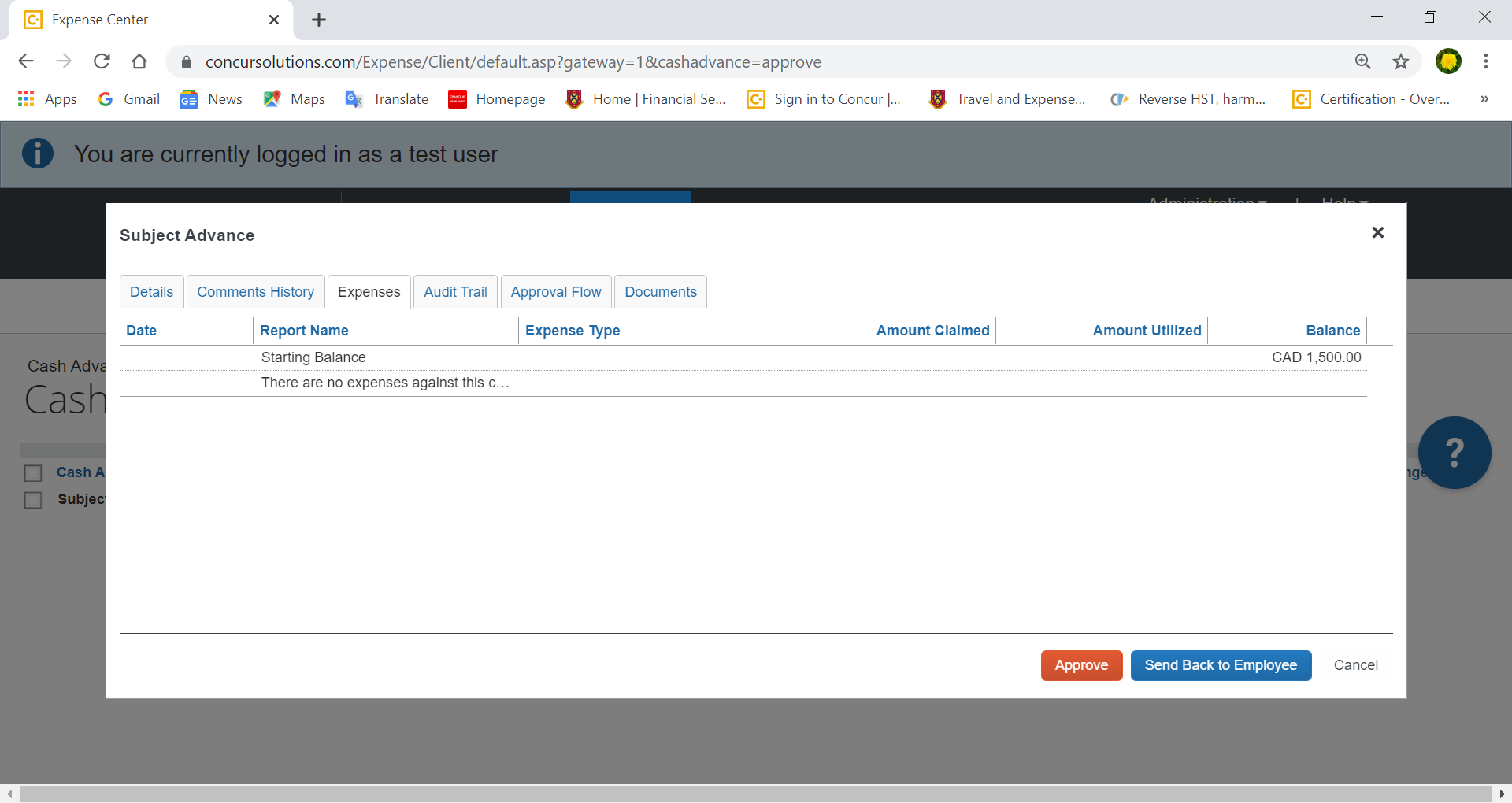
* Under the **Expense Reports** tab select the claim you want to review.
* Review the claim to ensure that all receipts are attached and then information entered is correct. See the “Approvers Checklist” for more information, but the main things to check for are:
  + Receipts are attached.
  + Amounts entered ERS are correct.
  + Dates are correct.
  + Items entered are eligible for reimbursement as per policy.
* If you have a Previewer set up, they may have already reviewed the claim.
* Review any exceptions that are listed on the claim
* Once you have reviewed the claim you can “Send Back to User”, “Approve” or “Approve & Forward” if needed. See previous descriptions.



**Approving a Cash Advances**



* This tab will only show if you have a Research Participant Advance that needs to be approved.
* Select the Research Participant Advances that needs to be reviewed.
* Ensure that the correct Project Number has been entered.
* Go through the different tabs to ensure that the information is correct and present.
* Once you have reviewed the Research Participant Advance request you can:
  + **Approve** will send the advance request to Financial Services for final review and issuing.
  + **Send Back to Employee** if there are any issues with the claim send it back to the employee with a note.
  + **Cancel** to back out of the request without making any changes or approving.



For more detailed information on what to look for please see the Approvers Checklist on the Financial Services website.

For more information, please contact [expenses@queensu.ca](mailto:expenses@queensu.ca)