Request Pre-Approval for Travel and Other Expense

Pre-Approval Process

Pre-Approval means you are asking permission to incur expenses. This is a method that is used to ensure that the funds are available.

Depending on departmental policy, employees/faculty may be required to request pre-approval before going on a trip or incurring an expense.

All exceptions to the Travel and Expense policy (e.g. upgrade to business class/first class travel) require pre-approval from a Principal, Vice-Principal, or Dean.

Requesting Pre-approval for Travel

- In the ERS go to Request, New Request.
- Fill in required fields (red line beside field) for the Request Header.
  - Ensure that the Business Purpose is clear and concise, if needed add more information in the comment box. If research-related, this must be noted, i.e. the study name mentioned.
  - “Travel Destination” can be entered as Kingston if you are seeking Pre-Approval for non-travel expenses.
  - “Travel Start Date” and “Travel End Date” - if seeking pre-approval for non-travel expenses, this can be entered as the dates closest to the event.
  - You do not need to fill in the Cash Advance Amount - if you fill this out you are requesting funds to be advanced - not just obtaining a pre-approval.
Request Pre-Approval for Travel and Other Expense

- If required by your department, and you are seeking pre-approval for over $10,000.00 of expenses, please enter estimated expense information in the Segments tab (i.e. for airfare, train, car, meals, etc.) &/or the Expenses tab.
- Click the Submit Request button.
- Select the Approver for the request – if you do not have an approver set up you will need to search by the last name.
- Click the Submit Request button again.
- Once the request has been approved it can be linked to an Expense Report.

Segments tab:

To be used if required by department, or if the request for pre-approval is over $10,000.00.

Click on one of the icons and enter the information in the required (red bar) fields, scroll down and click Save.

Expenses Tab:

To be used if required by department, or if request for pre-approval is over $10,000.00.

The expense types in the Expenses tab can be used to detail the estimated miscellaneous expenses (e.g. taxi, parking, supplies, etc.).