Electronic Expense Report (ER) Process for Visitors

Button labeled "Submit to TS for Traveler" only displays if preparer is not traveler.

If the traveler is active in JList, has a JLab User ID and is receiving payment for travel expenditures, the ER will flow to the traveler upon submission (**Submit**) of the ER by the preparer.

If the traveler is active in JList, has a JLab User ID and only has company paid travel expenditures (Company Paid = Total to be Expensed), the preparer completes with receipts and submits (**Submit**) the ER. The traveler can still sign but Travel Services also has the option to sign on behalf of the Traveler. Travel Services will receive a report indicating if the Expense Report has not been signed for seven days. If Travel Services does so, they will review the costs for reasonableness against the travel dates and sign or reject on behalf of the traveler. The ER will then continue to flow through the approval process as if the traveler had signed themselves.

If the traveler does not have a JLab User ID and is receiving payment for travel expenditures (Company Paid <> Total to be Expensed), when the preparer hits the **Submit** button, the ER will display "**Signer unable to electronically approve**". The preparer will print or save as PDF the ER and provide it to the traveler for approval. The traveler returns the approved ER to the preparer. The preparer attaches a copy of the approved ER and any applicable correspondence to the Electronic Expense Report. The preparer then hits the **Submit to TS for Traveler** button on the ER. The ER will then be routed to Travel Services to confirm the traveler's approval and can sign or reject the ER on behalf of the traveler. The ER will then continue to flow through the approval process as if the traveler had signed themselves.

If the traveler does not have a JLab User ID and only has company paid travel expenditures, (Company Paid = Total to be Expended) when the preparer hits the **Submit** button, the ER will display "**Signer unable to electronically approve**". The preparer will print or save as PDF the ER and provide it to the traveler for approval. The preparer attaches a copy of the approved ER and any applicable correspondence to the Electronic Expense Report. If the preparer determines that they are unable to get the traveler's signature, the preparer hits the **Submit to TS for Traveler** button on the ER. The ER will then be routed to Travel Services to review the costs for reasonableness against the travel dates and sign or reject on behalf of the traveler. The ER will then continue to flow through the approval process as if the traveler had signed themselves.

If the traveler is inactive in JList <u>and</u> has a JLab User ID and is receiving payment for travel expenditures (Company Paid <> Total to be Expensed), when the preparer hits the **Submit** button, the ER will display "**Follow-up with Traveler for Signature**". The preparer can contact the traveler and ask them to login to the JLab system to sign and submit their expense report, or the preparer can print or save as PDF the ER and provide it to the traveler for approval. If the traveler logs in and signs and submits their ER, no further action is needed by the preparer. If the traveler returns the approved ER to the preparer, then the preparer attaches a copy of the approved ER and any applicable correspondence to the Electronic Expense Report. The preparer then hits the **Submit to TS for Traveler** button on the ER. The ER will then be routed to Travel Services to confirm the traveler's approval and can sign or reject the ER on behalf of the traveler. The ER will then continue to flow through the approval process as if the traveler had signed themselves.

If the traveler is inactive in JList <u>and</u> has a JLab User ID and only has company paid travel expenditures (Company Paid = Total to be Expended) when the preparer hits the **Submit** button, the ER will display "**Follow-up with Traveler for Signature**". The preparer can contact the traveler and ask them to login to the JLab system to sign and submit their expense report, or the preparer can print or save as PDF the ER and provide it to the traveler for approval. If the traveler logs in and signs and submits their ER, no further action is needed by the preparer. If the preparer determines that they are unable to get the traveler's signature, the preparer hits the **Submit to TS for Traveler** button on the ER. The ER will then be routed to Travel Services to review the costs for reasonableness against the travel dates and sign or reject on behalf of the traveler. The ER will then continue to flow through the approval process as if the traveler had signed themselves.

Bobby shorten version:

Add button labeled “Submit to TS for Traveler” which only displays if preparer is not traveler.

If traveler is active in JList and has JLab User Account, route to traveler.

If traveler does not have JLab User Account, display message **Signer unable to electronically approve**.

If traveler is inactive in JList and does have JLab User Account, display message **Follow-up with Traveler for Signature**.