Delegate Submit for Expense Reports

As a delegate, you can submit a request on behalf of the traveler. However, you cannot actually submit an expense report on behalf of an active employee. This is due to a state requirement to get the traveler’s certification during the process of submission:

Traveler Certification: I, by approving here, do under penalty of perjury declare that the information contained in this document and any attachments are true and correct to the best of my knowledge and belief. If I owe the University money as a result of this claim, I hereby authorize the University to deduct the amount from the wages I will receive at the end of this payroll period. I also certify that no frequent travel miles earned from any official state transportation have been used for personal transportation purposes.

The delegate will see the submit button on all expense reports for both active and inactive employees:

1. For inactive employees, the button and audit rules will allow the delegate to submit on behalf of the inactive employee. **Only travel card transactions should be included on a Concur expense report for an inactive employee.** Allowable expenses that were paid by the (now) inactive traveler (including per diem) should be processed on a paper travel claim with the traveler’s signature on it.

2. For active employees, the delegate can click the submit button to view the warnings and errors that are triggered on submit.
   a. An audit rule is in place to prevent the delegate from actually submitting the report. Please note that this red error will remain on the report until the traveler clicks submit.
   
   ![Action Required: Report cannot be submitted by delegate.](image)

   b. Once all red errors are cleared (with the exception of the one above), the delegate can then notify the employee that the report is ready for them to submit. The change to allow the delegate to trigger the submit errors means the delegate will no longer see the Notify button; they will need to notify the traveler by sending them an email.