Approve an Expense Report

Use this instruction guide to review how to send back or approve an Expense Report. To complete these tasks, you must have the UF_EX_MANAGER security role. To learn more, consider taking PST931 Travel and Expense Approver.

1. Log in to myUFL
   • Click the Login button
   • Open an internet browser
   • Navigate to my.ufl.edu
   • Click the Access myUFL button
   • Enter your GatorLink username and password
   • Click the Login button

2. Navigate to: NavBar > Main Menu > Financials > Travel and Expense > Approve Transactions > Approve Transactions

Send Expense Report Back:

1. Select the Transaction ID for the Expense Report you want to approve.

2. Review the Expense Line Items.
3. Select **Notes icon** to view Expense Comments and Risks.

4. Review **Exception information**. In this case, there is a duplicate entry for “Taxi or Shuttle Services.”
5. Select **Return to Expense Report**.

6. Enter **Comments**.

7. Select **Send Back**.
8. Select **OK**.

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Approve Expense Report:
1. Select **Return to Approval List**.

2. Select the **Transaction ID** for the Expense Report you want to review.
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3. Review the **Expense Report**.

4. Select **Expense Details**.

5. Select the **Documents** button to review expense backup information.

6. Select **arrow** to view details.

7. Review **Receipt Information**.
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8. Select **Approve**.

9. Select **OK**.

10. Select **OK**.

If you need help with...
- Technical issues, contact the UF Help Desk at 392-HELP or helpdesk@ufl.edu
- Policies and Directives, contact the Travel Office at 392-1241