

- Budget manager receives an email advising that approval for an expense claim is required.
- Log into McOneSource using the link from the email or <https://messiah.unimarket.com>



### Approval Required

Messiah College

Expense Claim EE500381 for Daisy Ray Anderson-Suite 3012 - Hoffman Building Room 307

The following highlighted expenses require your approval.

Expense	Description	Supplier	Account Code	Distribution	Percentage	Amount
596	Lunch	Subway	2740-6200-	\$8.79	(100.00%)	\$8.79
TOTAL						\$8.79

[Please login to approve or decline this expense.](#)



Original recipients were 'to=([anderson@messiah.edu](mailto:anderson@messiah.edu)), from=([purchasing@messiah.edu](mailto:purchasing@messiah.edu))'

- Scan the **Approvals** Screen, for **warning icons**, a blue triangle and exclamation point. The icon indicates that the same employee submitted the same expense type, date, and amount on different claims. This feature is intended to avoid an employee mistakenly submitting duplicate requests. Carefully review both expenses to ensure that they are not duplicates by clicking on the **blue warning link** to view the information for the matching request. If they are duplicates, one should be declined.
- To review a request, click on the **blue claim number**, it begins with EE.

### Approvals



① You are currently available and will receive approval requests.

[Change Availability »](#)

Requisitions   Invoices   **Expenses 238**

Expense/Claim Number    Buyer    Period

Expense	Submitter	Supplier	Amount	
<a href="#">Claim EE500381. Lunch, Subway, Fred Pryor Training CL...</a>	Daisy Ray Anderson-Suite 3012 - ...			✓ Approve / Decline ALL
 596. Lunch		Subway	\$8.79	✓ Approve / Decline 
<a href="#">Claim EE500379. Lunch, Subway, Fred Pryor Training CL...</a>	David Wells			✓ Approve / Decline ALL

- Review the **background information** related to the claim at the top of the screen – the name and submitter lines should provide the 5Ws of the transaction, who, what when, where, and why.
- Review the **specific information** for each expense below noting the **expense type, supplier, date, amount and org/account coding**. Hovering over the eye icon will display org and account names.
- Click on the **paperclip** to review the attachments and verify that the items purchased comply with the Expenditure Policy.
- Click on the **blue Form Data link** to view additional information provided by the employee
- To approve or decline the expense, click on the blue **App/Dec** link to the right of each expense

Click here to approve or decline

The name and submitter lines should answer the 5Ws of the transaction

Click here to review receipts and attachments

Click here to review form data information

**Expense Claim EE500381**

Name Lunch, Subway, Fred Pryor Training Class, Harrisburg, PA 1.4.2019 Description

Submitter Daisy Ray Anderson-Suite 3012 - ... Created Date 1/23/2019 7:51 AM

State Pending Summary [Summary](#)

Attachments Copy Of Claim EE500380. Lunch, Subway, Fred Pryor T...

Expense	Supplier	Date	State	Amount
596. Lunch	Subway	1/4/2019 8:00 AM	Pending	\$8.79

App / Dec

Warning

Expense Type Meals - Travel [Form Data](#)

Account Code 2740-b200- 100.00%

Organization Unit Procurement

Total \$8.79

Review supplier, date, amount, expense type and org/account coding in the box above.

**Meals:**

- An itemized receipt, showing the cost of each item is required. A second receipt showing the tip and total paid is required if a tip was paid. A receipt showing only the total is not sufficient.
- The names of any college employee whose meal was paid for must be listed. If students' meals were paid for, the number of students in attendance should be listed. If someone from outside the college attended the meal, their name and title should be listed. Be sure to review this information on the **Form Data Link**.

**Mileage:**

- Documentary evidence of travel is required. A print out from an internet mapping site like Google Maps showing the beginning and ending locations and the total miles travelled, or a travel log noting the date, destination, and miles travelled or entering the date, destination and providing odometer readings in MC One\$ource is acceptable. Find this info in the **Form Data Link** or by clicking the **paperclip** to view the attachment.
- The IRS considers an employee's commute from home to the college a personal expense. Therefore, if an employee begins their travel from home, when calculating the number of miles

to be reimbursed, the number of round trip miles attributed to the employee's daily commute must be deducted from the total travelled.

- After reviewing all claim information, click **Approve** to approve the expense.
- To decline the expense, type the reason for declining in the **Reason Box** and click **Decline**.
- Reasons an expense might be declined:
  - The expenditure does not follow policy
  - The name/submitter fields do not provide the 5Ws (who, what, where, when, and why)
  - Incorrect org or account use
  - Receipt not itemized/receipt not attached/incorrect receipt attached
  - Duplicate expense submission
- Clicking **Cancel** closes the Approve/Decline Box.

The screenshot displays the 'Expense Claim EE500381' interface. At the top right, there is an 'Approval' button with a menu icon. The main content area shows details for the expense: Name (Lunch, Subway, Fred Pryor Training Class, Harrisburg, PA 1.4.2019), Description, Submitter (Daisy Ray Anderson-Suite 3012 - ...), and Created Date (1/23/2019 7:51 AM). A modal dialog box titled 'Approve / Decline Item Expense 596.' is open, featuring a text input field for 'Reason' with the placeholder text 'If declining, type reason for declining here.' Below the text field are three buttons: 'Approve', 'Decline', and 'Cancel'. The 'Approve' button is highlighted with a yellow circle. The background interface includes a table with columns for Expense, Amount, and App / Dec, showing an entry for '596. Lunch' with an amount of '\$8.79' and a status of 'App / Dec'. A 'Warning' icon is also visible. At the bottom right, a 'Total' of '\$8.79' is displayed.

- If approved or declined, a green banner at the top of the screen notes that the request has been approved or declined. and the state of the expense will change from pending to approved or declined.

Expense Claim EE500381



✓ You have approved item Expense 596.

Name	Lunch, Subway, Fred Pryor Training Class Harrisburg, PA 1.4.2019	Description	
Submitter	Daisy Ray Anderson-Suite 3012 - ...	Created Date	1/23/2019 7:51 AM
State	Pending	Summary	<a href="#">Summary</a>
Attachments		Copy Of Claim	EE500380. Lunch, Subway, Fred Pryor T...

Expense	Supplier	Date	State	Amount
596. Lunch	Subway	1/4/2019 8:00 AM	Pending <a href="#">App History</a>	\$8.79
				Warning

Expense Type	Meals - Travel <a href="#">Form Data</a>
Account Code	2740-6200- 100.00%
Organization Unit	Procurement

Total	\$8.79
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- Continue to approve other expenses as listed