Emburse User Guide:
Return an Expense Report Submitted by a Delegate

Receive an Emburse Expense Approval Email

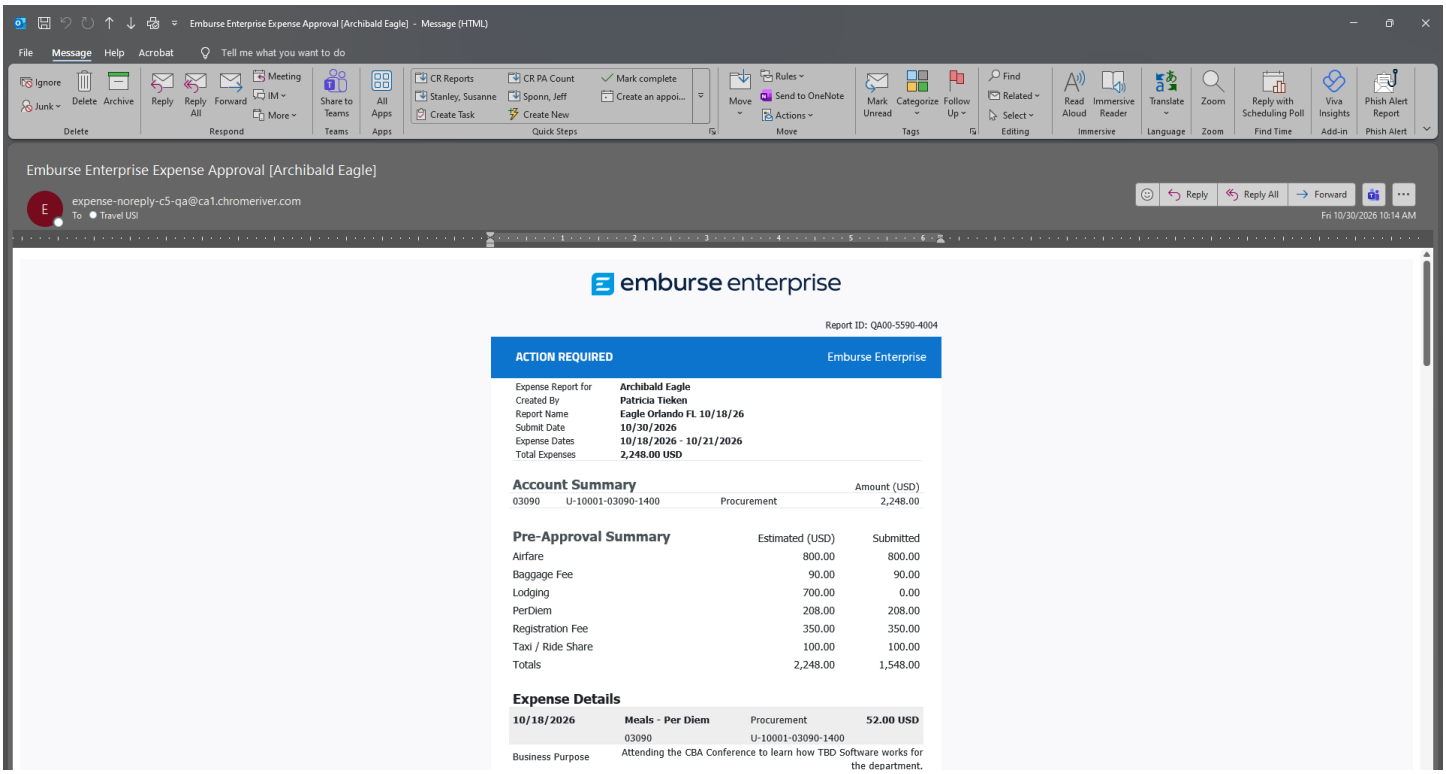
If a delegate creates your trip Expense Report in Emburse, then you will receive an email from Emburse once the delegate submits it, requesting action from you (the traveler).

The email provides a brief overview of the Expense Report information.

- Tip: Comments and documents uploaded to the Expense Report are **not** included with the email. To view these items, log in to Emburse.

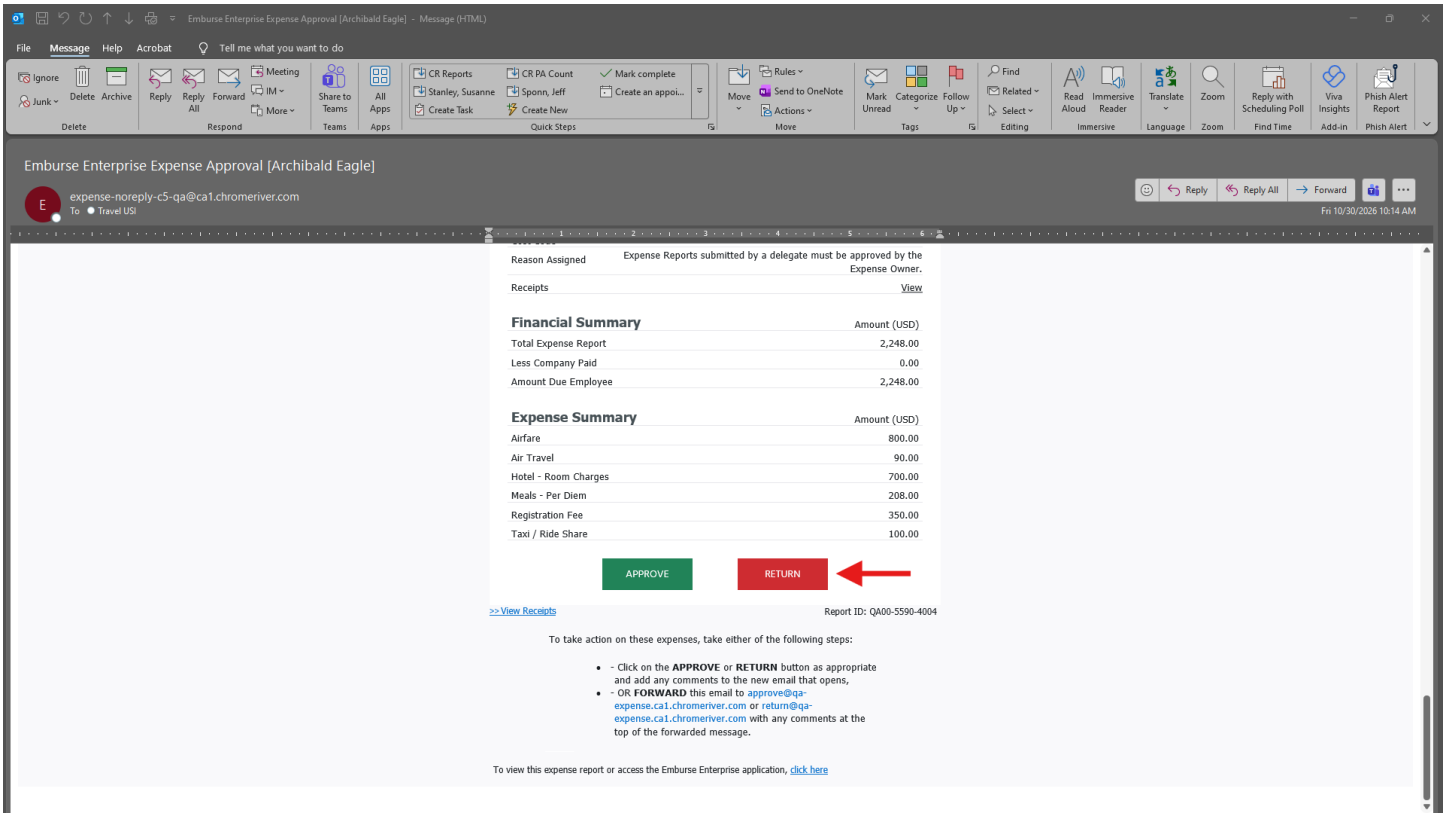
You must either Approve or Return the Expense Report. This guide reviews two ways to **Return** an Expense Report: through email and through Emburse.

- Tip: To Approve an Expense Report, view the guide Approve an Expense Report Submitted by a Delegate.



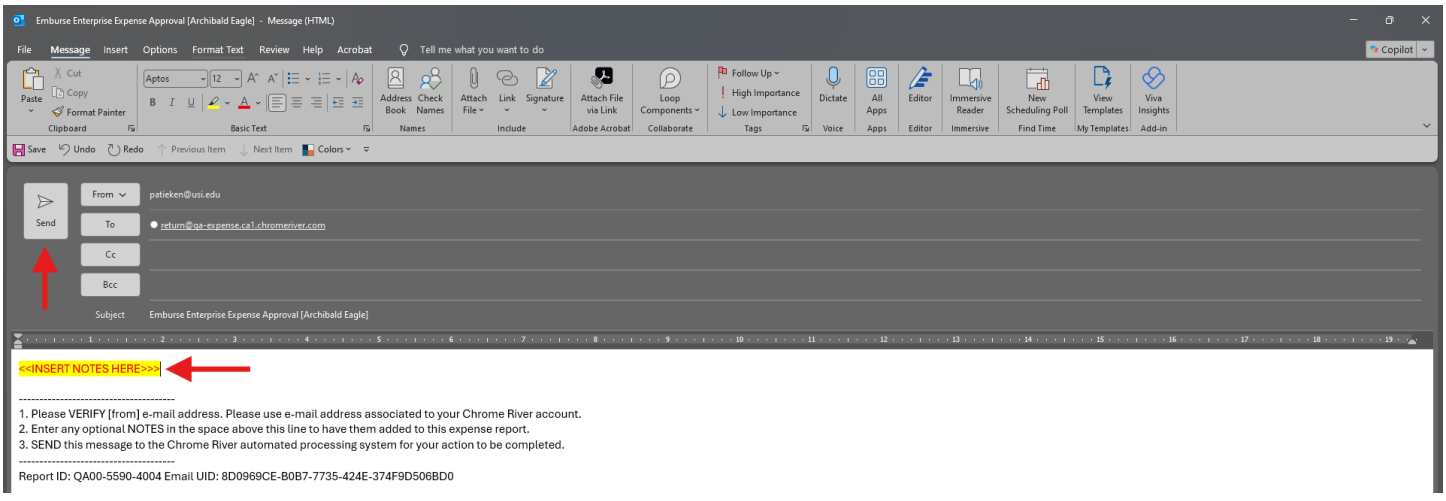
Return an Expense Report – Through Email (top)

Review the Expense Report email, and if changes or additions are needed, click **Return**.



A new email reply message will open. Enter notes to explain why the Expense Report is being returned. Click **Send**.

- Tip*:* **ALL** Expense Report return emails go to the traveler, not the delegate. Add the delegate's email to the CC line of the return email so he/she knows the Expense Report needs to be revised and resubmitted.
- Tip*:* If you cannot return through email, then go into Emburse to return the Expense Report.

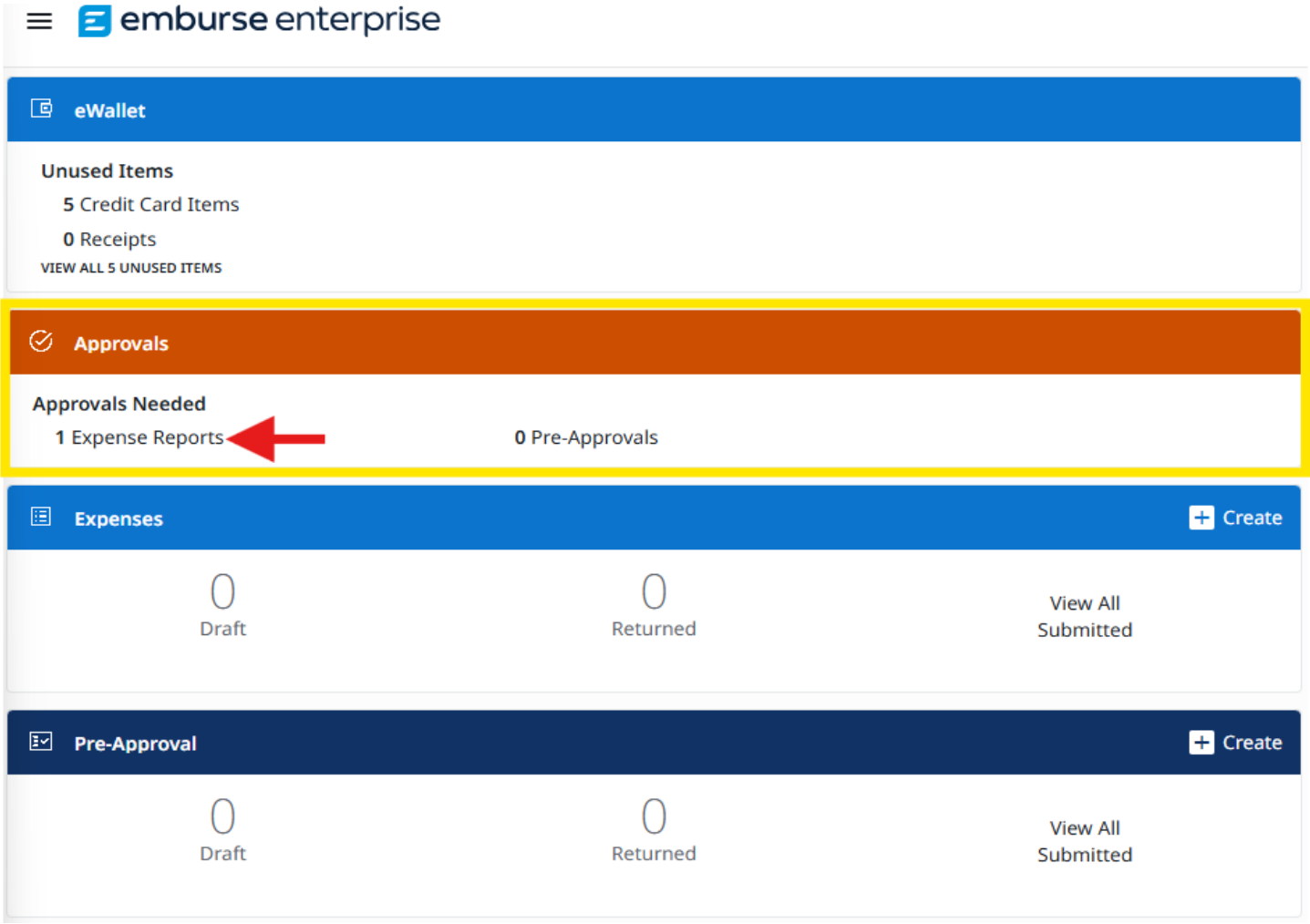


The traveler or delegate may log in to Emburse, make the necessary changes or additions, and then resubmit the amended Expense Report. Regardless of who makes the changes, traveler or delegate, the traveler must still approve the amended Expense Report (through email or Emburse).

Return an Expense Report – Through Emburse (top)

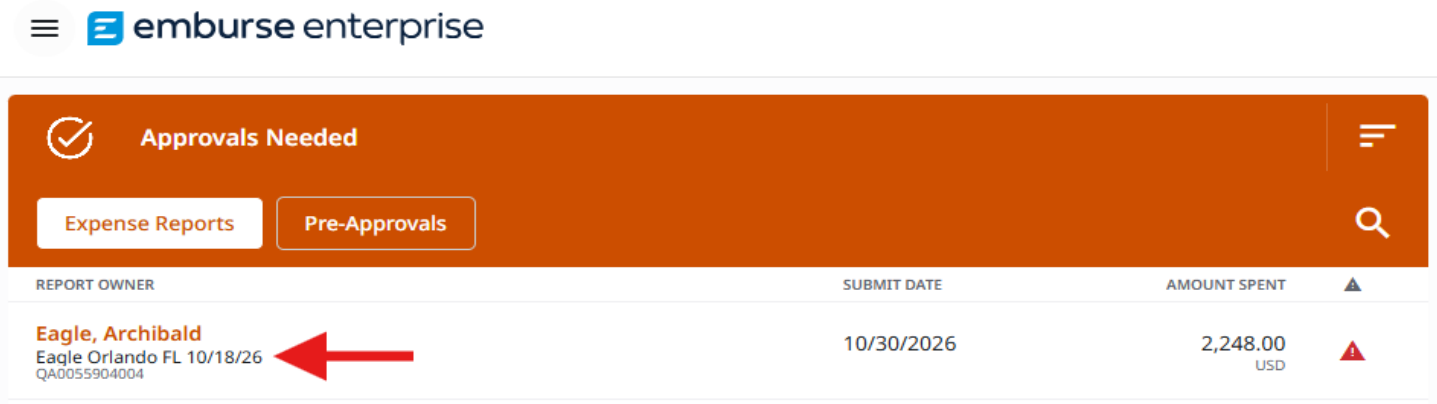
Log in to Emburse via myUSI.

The Approvals ribbon appears on the Home Screen if a document is pending approval. To see your Expense Report, click **Expense Reports** in the Approvals ribbon.

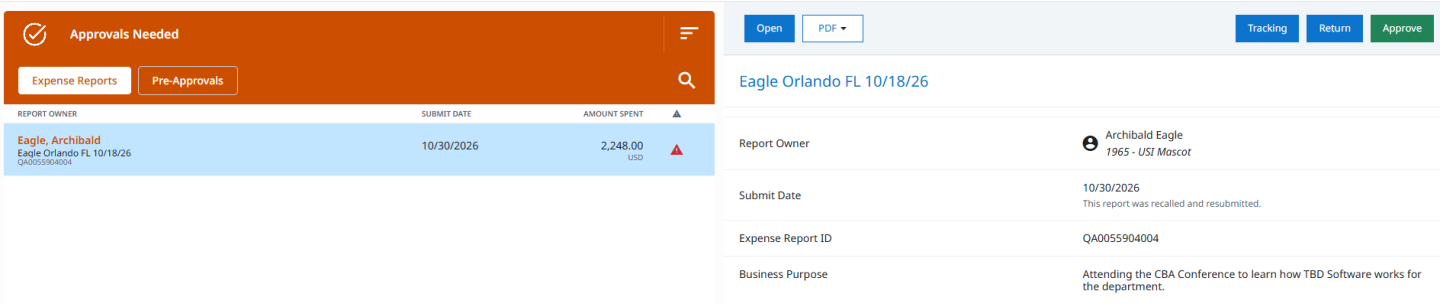


Click the Expense Report document that needs to be reviewed.

- Tip: The description should include the traveler's last name, destination, and trip departure date in the header.

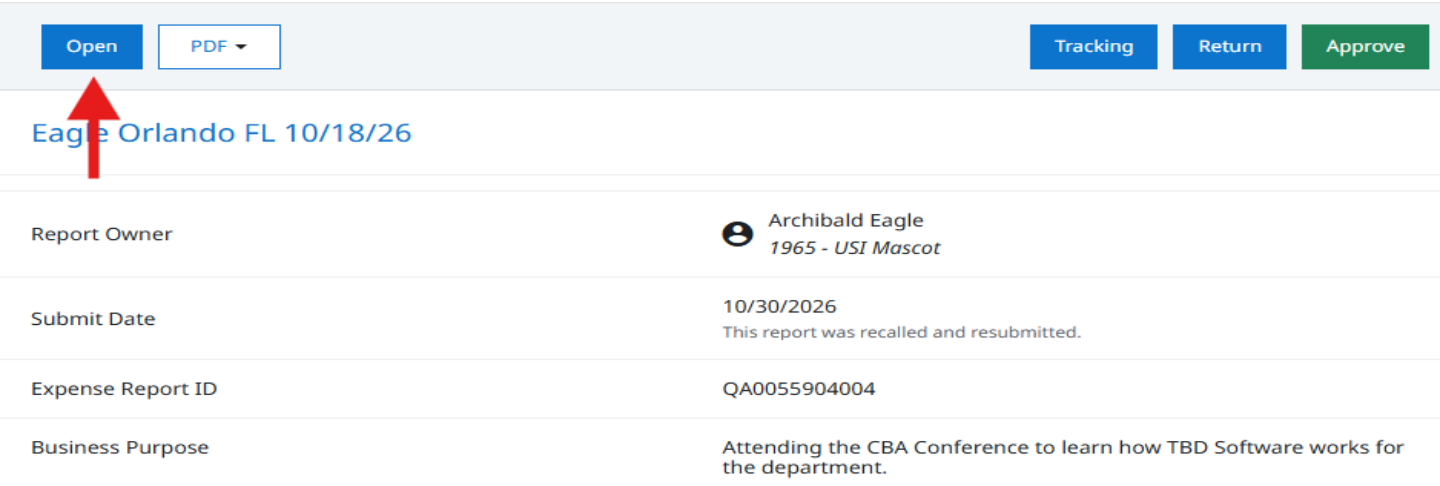


The Expense Report summary opens on the right for review.



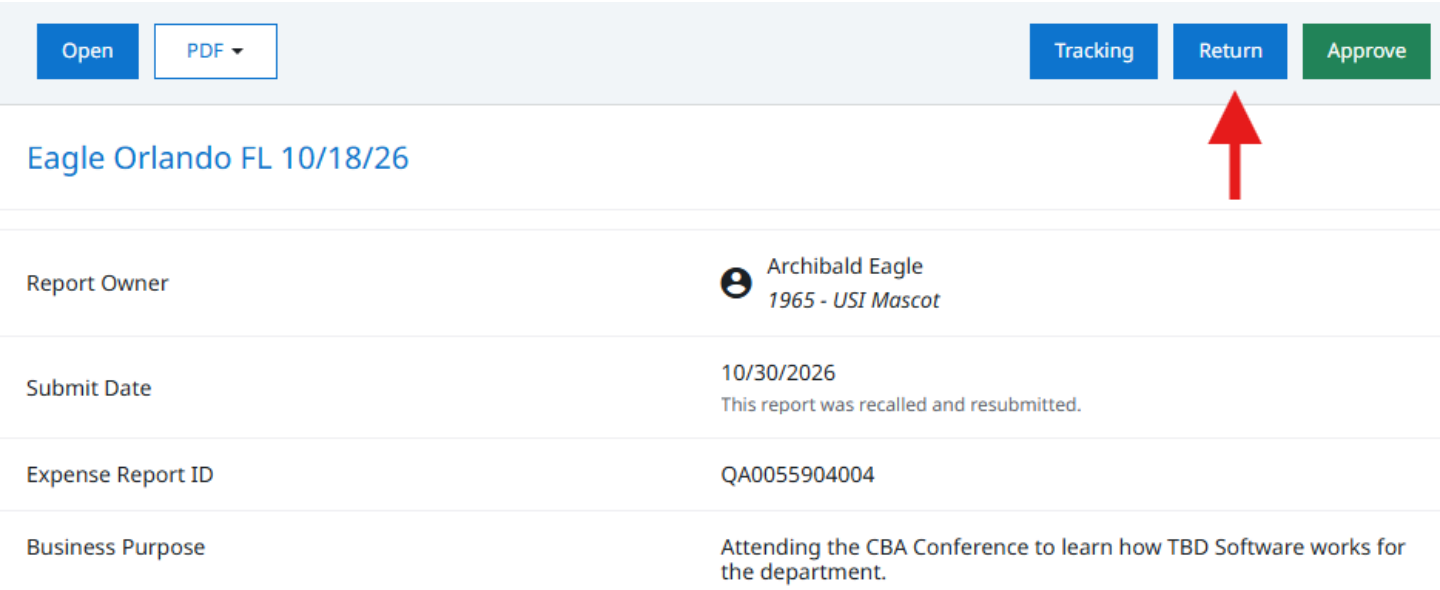
Scroll down to review the summary of the Trip Information, Comments, and Attachments.

- Tip: Click **OPEN** to see more detail of each expense estimate.



Review the Expense Report and if changes or additions are needed, then click **Return**.

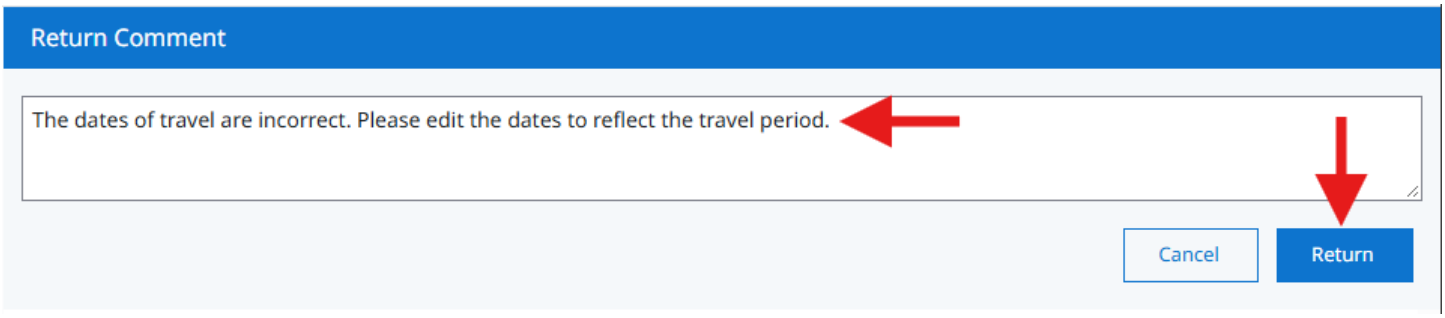
- Tip*:* All Expense Reports **must** be Returned if a change or addition is needed. The traveler may only edit an Expense Report created by a delegate after it is returned.



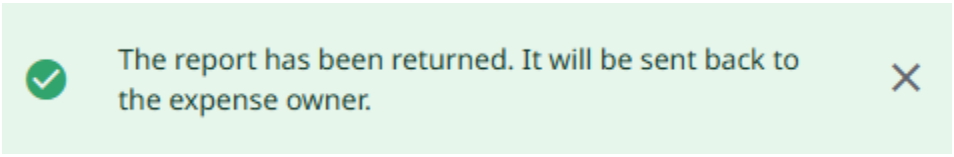
The **Return Comment** window opens. Enter a comment to document why the Expense Report is returned, which is required. Comments may give direction on additional items that need to be provided or changed, such as a change in the Fund Org selected, a change (increase/decrease) in the funding amount entered, etc.

After the comment is entered, click **Return**.

- Tip: Comments are visible to anyone accessing the report. Once a comment is posted, it cannot be deleted.



The message below will briefly appear at the top of the screen if the report was returned successfully.



Important:
You and the delegate will receive an email notification that the Expense Report was returned. You or the delegate may make the necessary adjustments to the Expense Report and resubmit it by logging in to Emburse via myUSI.

Regardless of who makes the change, traveler or delegate, the traveler must still approve the amended Expense Report (through email or Emburse). For guidance on what the traveler needs to do when an Expense Report is returned, contact Accounts Payable.