

Crucial Connections

MANAGER EXPENSE REPORT APPROVAL INSTRUCTIONS

EXPECTATIONS

Managers are responsible for reviewing their employee's expense reports in Concur and providing approval or denial based on employee's adherence to the [Crucial Connections policies](#). Please assist our accounting team by closely reviewing each report and returning it to employees for correction if needed.

HOW TO REVIEW AND APPROVE EXPENSE REPORTS

1. Login to [SAP Concur](#) using your Crucial Learning email address or Okta. If you need help accessing your account or resetting your password, contact ap@cruciallearning.com.
2. Select the "Report Name" either under the "Approvals" tab (top of homepage) or in the "Required Approvals" section (under "My Tasks").
3. Review all expense line items to ensure they follow event policies. Check the following:
 - **Receipts:** Review receipts to ensure the entry total matches the receipt total and that a receipt is attached. All expenses require a receipt, regardless of the amount.
 - **Individual Daily Meal Limits:** If the combined total for "Individual domestic meals" is over the daily maximum below, click "Send Back to Employee".
 - **Group Meals:** Make sure each meal attendee is listed for each group meal.
 - **Mileage:** The CruCon mileage reimbursement policy has been updated with a detailed list of what can and cannot be reimbursed.
 - **Event Code:** Check that the report uses the event code: "Crucial Connections Aug 2024".
4. Click "Approve" near the upper right-hand corner of the screen if all expense items follow the company and event travel and expense policies.
 - If any expenses do not adhere to policy, click "Send Back to Employee" and add a comment to explain why you are returning the report. Then click "OK" to return the report to the employee for correction. Common reasons to rejecting a report include:
 - Travelers exceeding the daily maximum for meal reimbursement
 - Locals requesting reimbursement for individual meals
 - Missing receipt for any amount
 - Missing names of group meal participants
 - Requested mileage is not reimbursable
 - Incorrect expense type
 - Missing event code

Contact ap@cruciallearning.com if you have any questions on what should or should not be approved.