**WORKDAY EXPENSE REPORTS**

- Only Expense Reports with Out-of-Pocket charges require Employee (spender) approval. Expense Reports with only P-Card charges will NOT require spender approval.
- The notification to Approve your Expense Report will be sent to your Workday Inbox. (Note: you cannot delegate the approval process to someone else)
- **Please do not share your Net ID and password** as this will give that person the ability to view and change personal information including your pay slips, tax deductions, etc.
- If the Business Office needs to “Send Back” an expense report for corrections, we will notify the preparer of the expense report via email. If necessary, the preparer will then make you aware of further instruction.

**Approving Expense Reports in Workday:**

1. Go to Workday https://www.myworkday.com/yale/d/home.html. Sign into Workday using your NetID and Password. Click on the *Inbox* Worklet or click your *Name* and then *Inbox* in the upper right hand corner of the page.

2. Under the *Actions* tab, click on the Expense Report that you want to Approve. This will automatically bring up the details.
   - If the amount, business purpose, and account charging look correct, select “Approve”.
   - If changes need to be made, select “Send Back” – this will send the Expense Report back to the preparer for editing. You should complete the “Reason” field with the reason why you are sending back the Expense Report.
3. Click on “Done” - The business process event moves to the next step and this action item disappears from your *Actions* tab. Your approved business processes are added to your *Archive* tab.

**Approving Expense Reports via Mobile Application:**

1. Download the mobile Application – instructions can be found at http://workday.training.yale.edu/training-materials/using-mobile-devices-workday
2. Click on the Workday icon on your phone
3. Then, Click on the Inbox Worklet
4. Select the Expense Report you want to Approve
5. Select “Approve” or Send Back”