03_Approve Spend Authorization

Purpose: The purpose of this task is to approve a Spend Authorization for expenses.

How to Access: Access your Workday **Inbox** and look for Actions that begin with “Spend Authorization”, and the title is **Review Spend Authorization**.

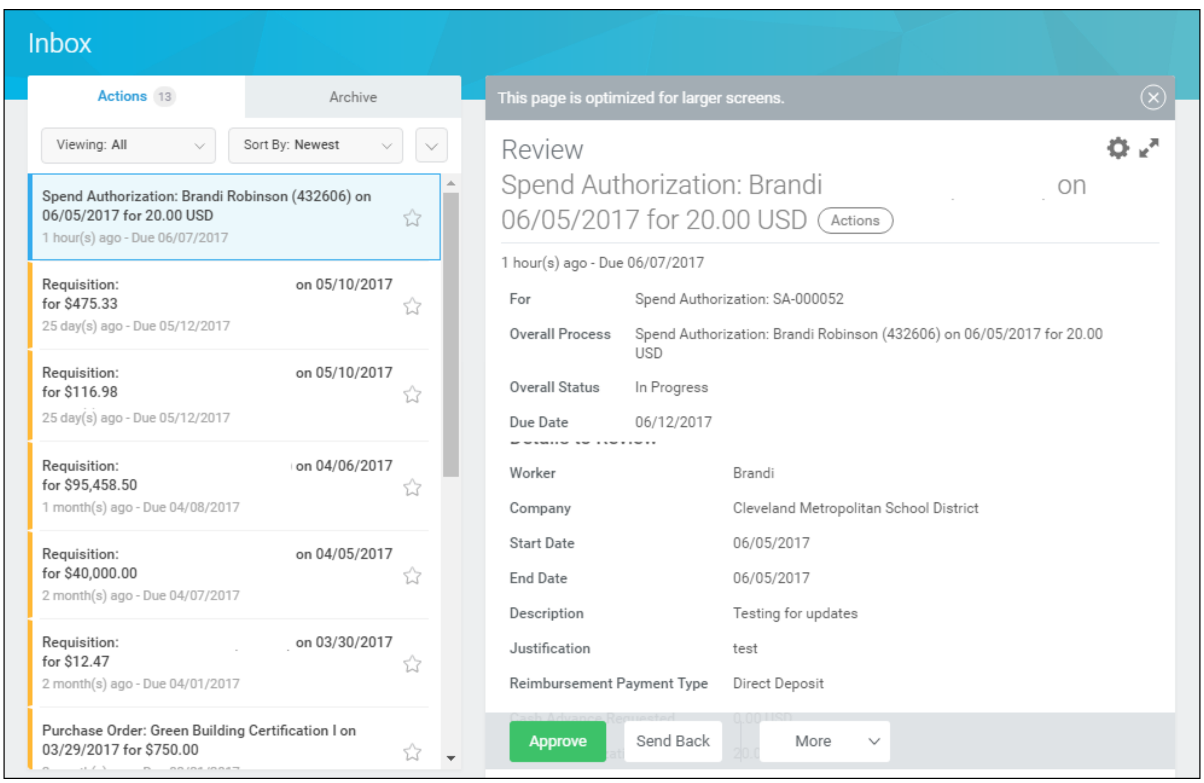
Audience: Approvers

Helpful Hints:

- Pending approvals show a number notification on **Inbox Worklet** icon. If no notification is visible, check with the creator of the **Spend Authorization** on submission.
- Be sure to check your inbox frequently to ensure open actions are processed in a timely manner.
- Workday displays fields in this task that CMSD is not using, only the fields listed in this document require you to complete, review, and/or update.

Procedure: Complete the following steps to approve a Spend Authorization.

Inbox



1. Select the required Spend Authorization.

Note: For the purpose of this work instruction, the required Spend Authorization Action displays.

2. As required, review the following fields:

Field Name	Required / Optional	Description
Due Date	Required	Identifies the date when the Spend Authorization should be Approved, Sent Back, or Denied.
Worker	Required	Identifies the employee who created the Spend Authorization.
Start Date	Required	Indicates the first date of the expenditure.
End Date	Required	Indicates the ending date of the expenditure.
Description	Required	Identifies the title of the Spend Authorization.
Justification	Optional	Identifies the reason for the expenditure and should include the total estimated cost, with the District Paid costs broken out.
Spend Authorization Total	Required	Identifies the estimated total employee paid expenditures.

3. Scroll down to the Spend Authorization line items.
4. As required, review the following fields for each line item included in the Spend Authorization:
Note: It will be necessary to click on each line item to review the following fields.

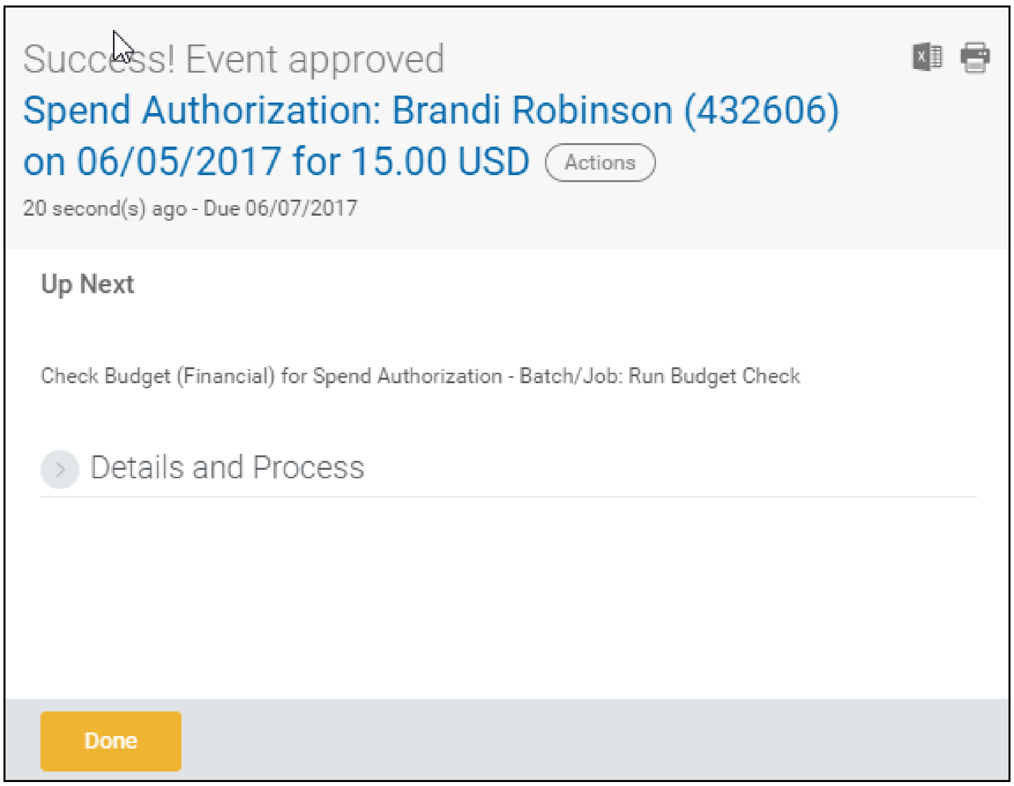
Field Name	Required / Optional	Description
Expense Item	Required	Indicates the type of expense.
Quantity	Required	Identifies how many items.
Per Unit Amount	Required	Identifies the dollar amount for each item.
Total Amount	Required	Identifies the total cost for the line item.
Memo	Optional	Use to provide additional information to those processing the Spend Authorization.
Fund	Required	Identifies the fund to pay for the line item.
Cost Center	Required	Identifies the location/department to pay for the line item.
Function	Required	Identifies the function to pay for the line item.
Program	Required	Identifies the program to pay for the line item.
Additional Worktags	Optional	Used when the Spend Authorization line item is being paid by a Grant, Gifts, or Projects

5. Click the **Attachment** to open and review the details.
6. Click **Done** to close the *Attachment* pop-up window.
7. As required, enter any notes in the **enter your comment** field.

8. As required, complete one of the following:

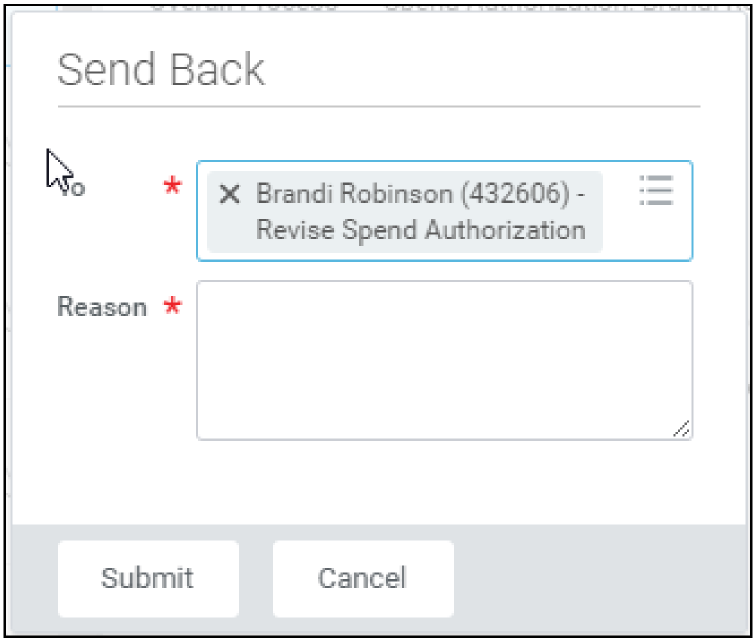
If you want to…	Then…	Go to
Approve the Spend Authorization,	Click Approve .	[Step 9](#)
Return the Spend Authorization to the initiator for updates,	Click Send Back .	[Step 11](#)
Reject the Spend Authorization,	Click More > Deny.	[Step 15](#)

Success! Even approved



9. Review the displayed information.
10. Click **Done**.
    Note: You have successfully approved the Spend Authorization. Continue to the *Results* section of this document.

Send Back

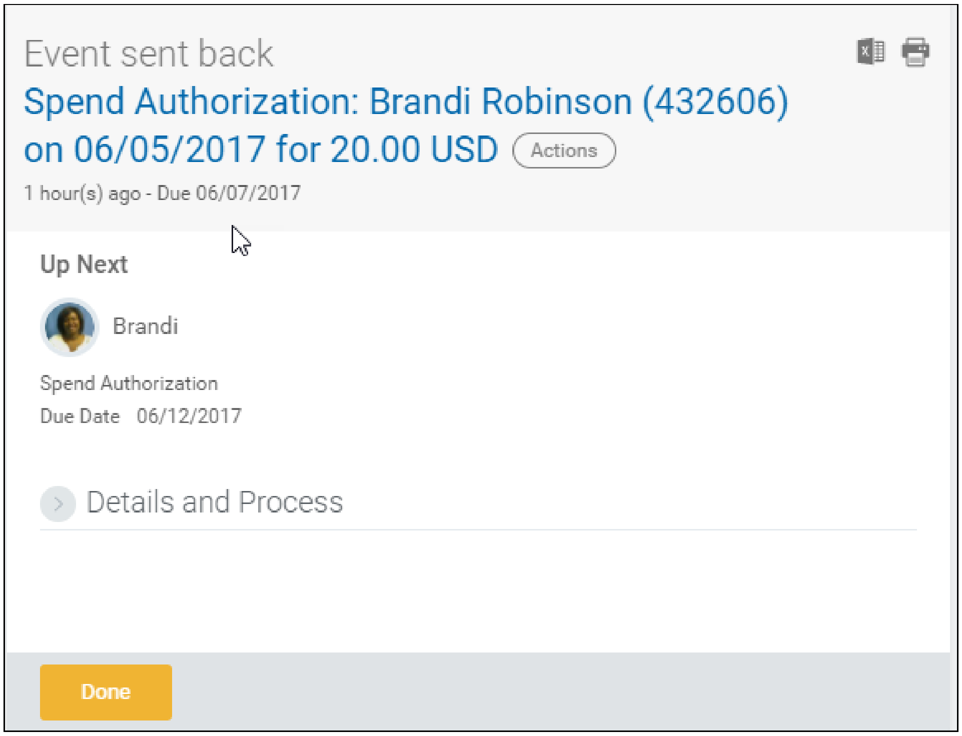


11. Complete the following fields:

Field Name	Required / Optional	Description
To	Required	Identifies who to return the Spend Authorization for additional processing. Defaults to the initiator.
Reason	Required	Enter the reason why the Spend Authorization is being returned.

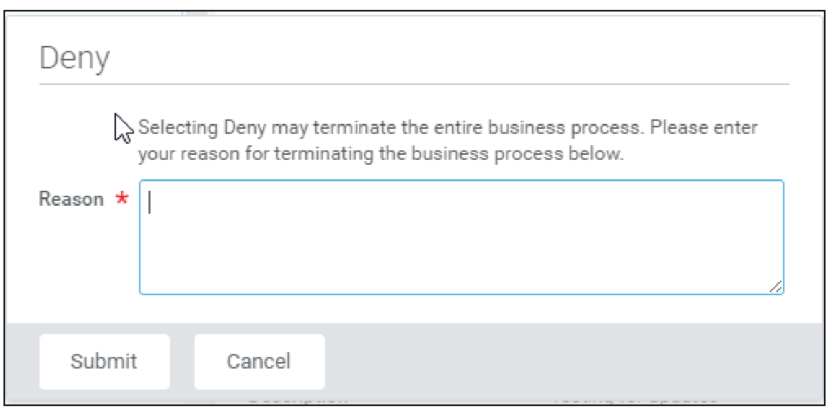
12. Click **Submit** to trigger the return of the Spend Authorization and return to the *Workday Inbox* screen.

Event Sent Back



13. Review Details and Process to confirm who the Spend Authorization was returned to.
14. Click **Done**.
    Note: The approval process is now on hold until the person updating the Spend Authorization resubmits it for approval. Continue to the *Results* section of this document.

Deny



15. Complete the **Reason** field to enter why the Spend Authorization is being denied.
16. Click Submit to deny the Spend Authorization.
17. Click **Done** to confirm the cancelation of the Spend Authorization.

Result:

You have successfully processed the Spend Authorization from your Workday Inbox.