Quick Reference

Create Pre-Approval Report (Student)

Create New Pre-Approval Report

1. Click the +CREATE button in the upper right corner of the Pre-Approval swim lane.

Add Expenses

4. Select the specific expense tile you want to add to the Pre-Approval Report

5. Complete the expense tile form and click Save at the top right side of the screen to continue.

- Estimated Amount: Enter the estimated amount for this expense type.
- Description: Provide any additional information about this expense. This field is optional for most expense types.
- To Be Paid By: Select the option that best describes the anticipated payment method for the expense.

6. The expense will be added to the Pre-Approval Report and will be visible on the left side of the screen. The Add Pre-Approval Types page will appear on the right side of the screen.

7. Continue adding expenses to the report by selecting the appropriate expense tile, completing the expense form, and clicking save at the top right side of the screen.

Submit

8. When you have completed all the entries for the Pre-Approval Report, click the Submit button located at the bottom of the left side of the screen.

9. A submit confirmation will appear at the top of the right side of the screen.

- Cancel: Clicking cancel allows you to return to the Pre-Approval report to make any needed changes. You can chose to leave the report in draft status.
- Submit: