



Compass 9.2

❄️ December 9, 2016 ❄️

Expense Reports for Healthcare Employees

Tip: For Healthcare employees requiring expense report assistance, be sure to use the job aid created specifically for Healthcare. Healthcare users follow different business processes than University, have fewer expense types and do not use My Wallet.

Job Aid: [Creating an Expense Report - Healthcare](#)

You may also contact Emory Healthcare Accounts Payable department at 404-686-2466 with specific Healthcare Travel & Expense training questions.

Expense Reports Email Notifications

For now, **you will not receive email notifications** when you successfully submit an Expense Report nor when the Expense Report is approved. This is a known issue and we are working through the fix.

Tip: To view the status of your Expense Report, go to the Travel & Expense Center.

Employee Self-Service > Travel and Expense Center > Expense Report > View

- 1) You are taken to the Expense Report Summary and Submit page. The **Expense Report Status** is near the top center.
- 2) Expand the **Approval History** section to see where the Expense Report is in Workflow.

View Expense Report

Arie Smith | Report: 0000485244 | Submitted for Approval

Business Purpose: Meeting | Description: Parking for Offsite meeting | Reference: TRAVEL

Totals	Employee Expenses (1 Line)	Cash Advances Applied	Non-Reimbursable Expenses	Prepaid Expenses	Employee Credits	Supplier Credits
	10.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD	0.00 USD

Amount Due to Employee: 10.00 USD | Amount Due to Supplier: 0.00 USD

Approval History

Department Approver - Non Cent

SHEET_ID=0000485244, LINE_NBR=1, DISTRIB_LINE_NUM=1: Pending

Payment Services

SHEET_ID=0000485244, LINE_NBR=1, DISTRIB_LINE_NUM=1: Awaiting Further Approvals

Action	Role	Name	Date/Time
Submitted	Employee	Arie Smith	12/09/2016 1:14:13PM

Expense Reports Workflow

We hear you. There are known issues with Expense Report workflow and these are part of a larger system issue that we don't have work-arounds for right now. We appreciate your patience. We will keep you informed through the Tips & Tricks emails.

Emory Express: SAM Validation

Good News! The system will now only do the validation if the amount of the Requisition, PO or invoice is \$25k or greater.

Emory Express: Using the Program and Event Chartfield Codes

What Has Changed?

In our pre-upgrade environment, users were able to change the **Program and Event Code** in the chartfield string, if desired. This functionality is critical to certain units for effective reporting and tracking; however, it was not an available option in the upgraded environment. We have now restored the ability to change the Program and/or Event code at the transaction level in Emory Express, if desired.

When Will This Happen?

The change was migrated Thursday night and will be available in Emory Express on Friday, December 9th.

What Do I Need to Do Differently?

If you **do not want** to change the Program and/or Event assigned to your selected SpeedType:

1. Enter your SpeedType as normally would.
2. Ignore the blank fields for Program and for Event.

When recorded in Compass, the transaction will reflect the chartfields for the SpeedType selected.

If you **want to change** the Program and/or Event assigned to your selected SpeedType:

1. Enter the SpeedType as you normally would.
2. Enter the Program Code and/or Event Code that you want to assign to the order for tracking purposes.

When recorded in Compass, the transaction will reflect the chartfields for the SpeedType selected for all fields except Program and Event. The Program and Event codes will reflect what you entered in Emory Express.

Wire Payment Request or ACH?

The Compass Wire Payment Request is used for **international supplier payments**. Suppliers may be people or businesses that have provided a service to Emory.

When paying a **domestic supplier**, [Emory's preferred payment method is ACH](#) (Automated Clearing House) funds transfer. With ACH, banking information is setup in the supplier's profile in Compass and is automatically applied to all payments in Emory Express or Compass Payment Requests.

For domestic suppliers, Compass Wire Payment Requests are only used if the supplier requires electronic payment but does not accept ACH, i.e. real estate payments.

Status Definitions for Expense Reports and AP Payment Request

Expense Report Status		AP Payment Request Status	
Status	Definitions	Status	Definition
Pending	Status after first Save for Later action.	New	Created and Saved. Not sent for approval
Submitted	Sent to Workflow	Denied	Returned to the submitter by an approver. Comment message from approver required
Denied	Returned to submitter/employee by approver. May not be edited or resubmitted. May only be deleted. Includes comment from approver.	Submitted	Temporary status between new and Pending while workflow is being determined and routed
Sent Back	Returned to submitter/employee for rework. Includes comment from approver.	Pending	In approval workflow
Hold	Claim action by approver. Prohibits other approvers in an approval pool from accessing.	Approved	After the final approver approves. Sent to queue to be vouchered
Final Approval	Last approval step. Sends to AP for payment.	Vouchered	Approved payment request, ready for next pay cycle.
Staged for Payment	Added to the next AP Paycycle.	Cancelled	Any terminated payment request prior to payment. Cannot be resubmitted
Paid	Paycycle complete. Check, Wire, or ACH printed or distributed.	Paid	Paycycle complete. Check, Wire, or ACH printed or distributed.

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