**Approvers - View & Approve Travel Requests/Expense Reports via ESS & Concur**

This job aid is to provide step-by-step instructions for approvers on how to review travel request/expense report documents and approve/reject them.

1. Log into [ESS](https://ess.lausd.net/) with your LAUSD single-sign-on and click on the “Travel Approvals” tile to begin reviewing Travel Requests and/or Travel Expense Reports.
2. After opening your Travel Approvals inbox, you can scroll through the queue or search for specific requests/reports using the search bar. You can search by the traveler’s name or by the four-digit Travel Request ID/six-digit Expense Report ID:
3. Once you find the request you are looking for, review the details of the request:
4. Ensure that the name of the conference is in the “Trip Name” field. The employee’s name should not be here.
5. The “Trip Purpose” field should have a valid reason for the travel (i.e. Grant Requirement, Professional Development, Training, etc.) or the Freeze explanation.
6. The “Trip Start” date should be the date of departure & the “Trip End Date” should be the date of the return from the trip.
7. Make sure the “Travel Destination” field is correct. (Local = within 45 miles each way)
8. If “Other” is selected for the “Freeze Justification” there **MUST** be a valid **reason** in the “Purpose” field.
9. Ensure that the “Hotel Business Purpose” statement is correct. District policy currently states that hotel costs should not exceed $300 per night, including taxes & fees.
10. All expenses must be listed as either “LAUSD District Paid” or “Self-Paid”. The only exception is when the Hotel or Airfare will be booked with the Concur Booking tools, in which case the expenses must be paid via the “Virtual Card”
11. After reviewing the travel details, you will need to review the attachments. A travel request should **always** have attachments. A request with no documentation should be **rejected**. Click on the “Review Attachments” link at the top of the request:
12. You will be redirected to Concur. Use your LAUSD single-sign-on email to login:
13. Click on “SAP\_IAS\_PRD”:



1. Login again using your LAUSD single-sign-on email address & password:
2. Once logged in you can use the “Home” drop-down to navigate to the “Requests” or “Expense” searches:



1. Once you are redirected, click on “Process Requests” or “Process Expenses” depending on whether you are trying to approve a travel request or expense report:
2.  When searching for travel requests, change the filters to “Request ID” and “Begins With”. Then enter the 4-digit travel request ID (Trip Number) in the search box (letters must be uppercase). Then click “Go”:
3.  When searching for expense reports, change the filters to “Report Number” and “Begins With”. Then enter the 6-digit expense report ID (Trip Number) in the search box (Ensure the letters are uppercase). Then click “Go”:
4.  After locating the desired request/expense report, you can click on the paperclip icon to open the attached document packet, which will open the attachments in a new window.
5. Please see the lists below regarding supporting documentation requirements for travel requests & expense reports:

|  |
| --- |
| All TRAVEL REQUESTS should include: * A copy of the Brochure/Flyer/Agenda and it **must** contain the name of the conference, dates, and location.
* A copy of the responses to the [Deputy Superintendent of Instruction's Justification Questions](https://acrobat.adobe.com/id/urn%3Aaaid%3Asc%3AVA6C2%3A27176c65-5bc8-4ed5-9293-e05590541aee) if the traveler belongs to a school site or central office under the Deputy Superintendent of Instruction.
* Screenshot of 3 estimates for hotel (if applicable)
* Screenshot of 3 estimates for airfare (if applicable)
* Screenshot of 3 estimates for car rental (if applicable)
* Screenshot/printout of Google Maps showing the mileage from school/work to event location
 |
| All EXPENSE REPORTS should include:* A copy of the Brochure/Flyer/Agenda and it must contain the name of the conference, dates, and location.
* Corresponding receipts for the expenses listed in the report. (Per Diem & Personal Car mileage expenses do not require receipts).
 |

1.  Once all the documents have been reviewed you can go back to the original Travel Approvals queue in ESS. You can then select “Approve” or “Reject”.
2.  You will be prompted to add a note. It is highly recommended you add notes if you are rejecting a request so that travelers can review them and make necessary changes.
3. Once approved, the request will continue along the approval process. If rejected, the employee will receive an email alerting them that the request was returned for corrective action.