The Proxy

The *Creator Proxy* can complete an Expense Report (ER) or Travel Plan (TP) on behalf of Expense Report and Travel Plan Creators. The Traveler must review the expenses and *Submit their own Expense Reports/Travel Plans*; the Creator Proxy cannot Submit the ER or TP on behalf of another.

The *Reviewer Proxy* can Review/Approve an Expense Report (ER) on behalf of the Reviewer/Approver. The Reviewer Proxy acts as if they were the Reviewer/Approver and reviews and approves the Expense Report (ER).

Step	Task
1.	Click the **Start Proxy** command button
2.	Click the drop-down; select the **Available Proxy User**
3.	Click the **Start Proxy** command button (Note: *You are proxying for…*)
The Creator Proxy	
4. a.	**Create** the **Expense Report** (refer to the *Complete an Expense Report* job aid) • *The Proxy cannot Submit the Expense Report* • *TEM does not notify others that the Expense Report is ready to Submit*
The Reviewer/Approver	
4. b.	Select the **Documents to Review** tab 1. Locate the **Expense Report** to Approve 2. Click the **Open Document** icon 3. Review the Expense Report details: • *Charge Code Reviewer* – review **Charge Codes**; click **Approve/Reject** • *Special Group Reviewer* – review for compliance • *Approver* – review **Expense Details** (e.g., *Approved Amount*) 4. Click the **View Receipts** link to view scanned receipts 5. Enter information in the **Document Note** 6. Select **Approve**, **Reject**, or **Return for More Info** 7. Click the **Close** command button
5.	Click **End Proxy**

Additional information:

- TEM does not automatically notify the Traveler an Expense Report is ready for them to submit
- The Proxy must notify the submitter of all exceptions (e.g., *room rate over allowable amount*)
- Refer to the *Create an Expense Report (ER)* job aid.