UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN · CHICAGO · SPRINGFIELD

TEM
travel & expense management

The Proxy

The Creator Proxy can complete an Expense Report (ER) or Travel Plan (TP) on behalf of the owner of the expense report and travel plan. The owner must review the expenses and *submit their own ERs and TPs*; the Creator Proxy *cannot* submit the ER or TP on behalf of another person.

The Reviewer Proxy can review or approve an ER on behalf of the Reviewer or Approver. The Reviewer Proxy acts as if they were the Reviewer or Approver and reviews and approves the ER.

Step	Task
1.	Click the **Start Proxy** button.
2.	Select the **Available Proxy User** from the menu.
3.	Click the **Start Proxy** button. **NOTE:** *You are proxying for…*

Creator Proxy

4a.	To create the ER, refer to the *Complete an Expense Report* job aid. • The Proxy cannot submit the ER. • TEM does not notify the owner that the ER is ready to submit.

Reviewer and Approver

4b.	Select the **Review** tab. 1) Locate the ER to approve. 2) Click the **Open Document** icon. 3) Review the ER details. • Charge Code Reviewer—Review Charge Codes; click **Approve** or **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** button.
5.	Click the **End Proxy** button.

Additional information:
- TEM *does not* automatically notify the owner that an ER 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.