State of Kansas

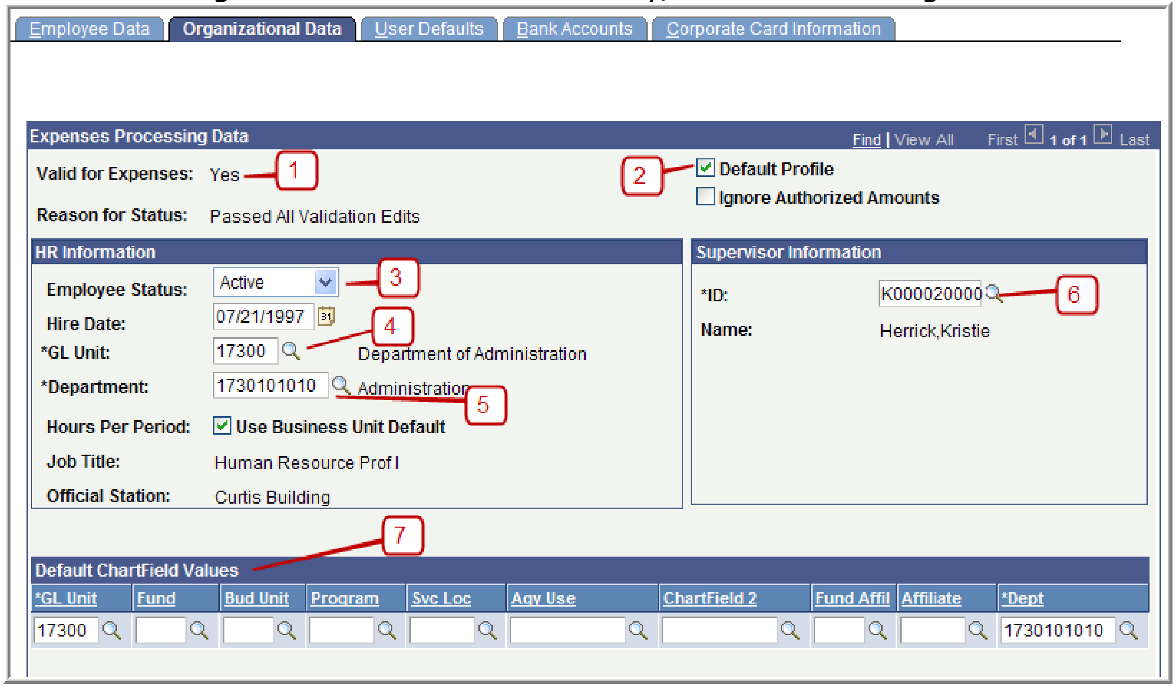
Adding an Expense Payee

Statewide Management, Accounting, and Reporting Tool

Step	Action
1	Navigate to Travel and Expenses>Manage Employee Information>Update Profile - search for the employee id that you want to activate.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>

Click on the Organizational Data tab and verify/enter the following information:



1. Profile must be valid for expenses before they are eligible to create expense documents. See Step 4 for instructions if this value is “No”.
2. Make sure the default profile box is checked for the appropriate record. Most employees will only have one active record. For those employees that have multiple active records, navigate to the appropriate record and check the default profile box.
3. The status for this field should be “Active” if it is the default profile. If the status is anything other than active for the default profile, please contact a representative from the SHaRP system to verify status. Agency staff should not change this field.
4. Verify that the record that you are accessing is for your business unit. Agency staff should not change this field.
5. Select the appropriate department for this traveler. This will be the department that populates on the expense documents which drives workflow routing at the department approver level.
6. Enter the employee ID of the person that is responsible for approving the expense document at the Supervisor level.
7. Default Chartfield Values – enter any default chartfield values that you would like to default into the expense document. Note – Fund, Budget Unit and Program are required if you are creating cash advances through the Travel and Expense module.

</td></tr>
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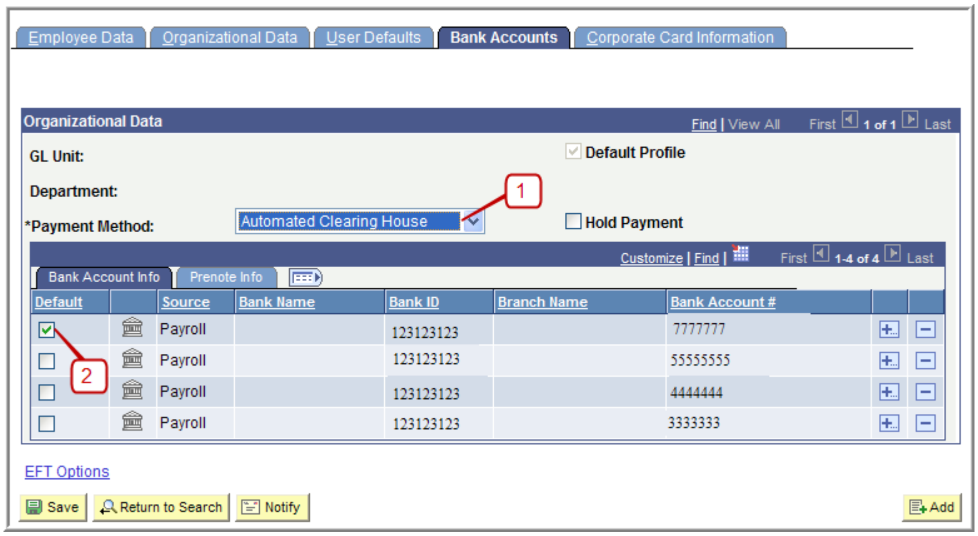
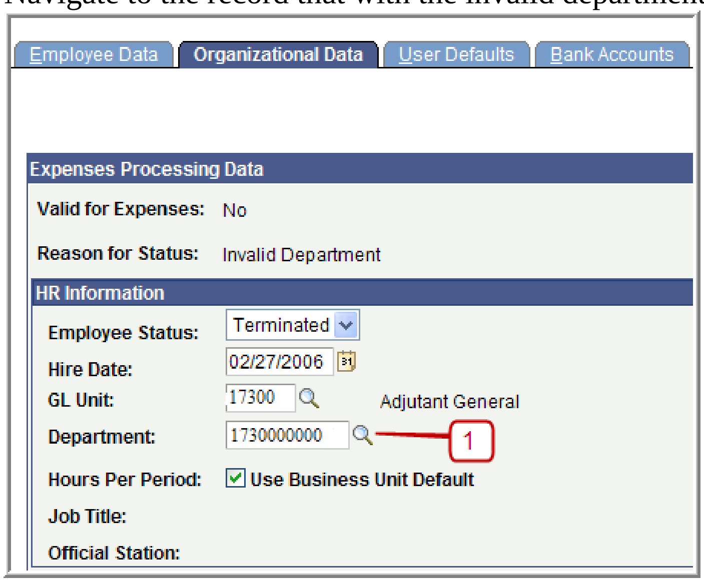
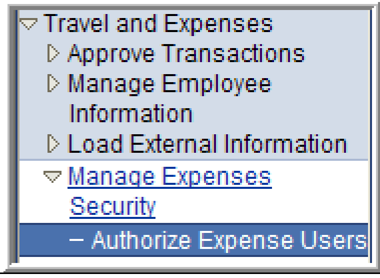
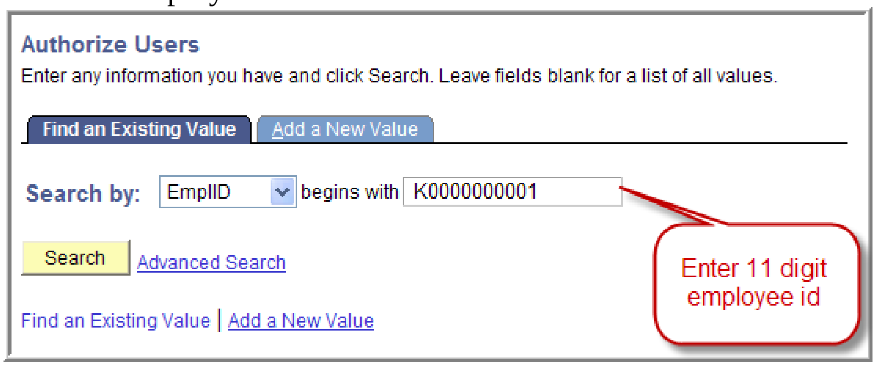
Step	Action
3	Click on the Bank Accounts tab  1. Verify the Payment method System Check and Automated Clearing House are the only valid values for Travel and Expenses 2. Make sure the default check box is selected for the desired bank. Expense checks <u>cannot</u> be split between multiple accounts. Click the Save button
4	If the profile has a status of "No" in the valid for expenses field and a Reason for Status listed as Invalid Department: Navigate to the record that with the invalid department.  1. Click the look up and select the first department value. It is acceptable to change the department on records that are not for your agency due to the fact that these will not be the default profile records and no transactions will be processed against any record that is not marked at the default profile. Click the save button. When you have saved the profile a yellow Validate button will appear at the top of the profile. Click the validate button to update the Valid for Expenses status.
5	The next step to setting up an Expense Payee is to assign proxies.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Navigate to Travel and Expenses>Manage Expenses Security>Authorize Expense Users

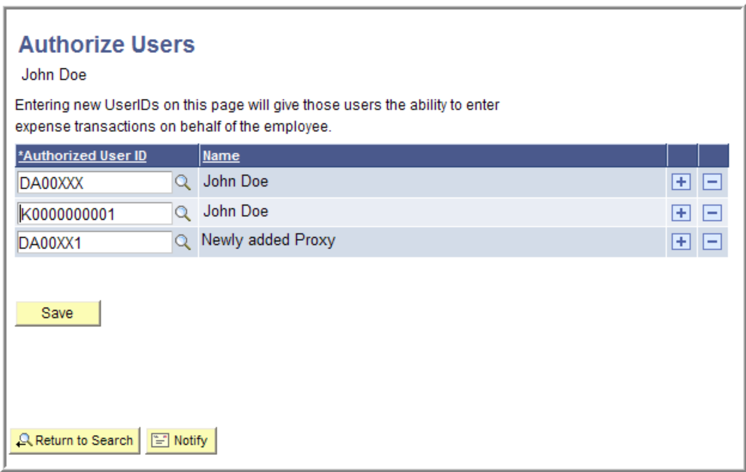
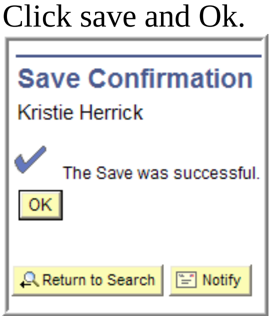


</td></tr>
<tr><td>7</td><td>Enter the employee ID for the traveler



Click the search button</td></tr>
<tr><td>8</td><td>The Authorize User page will display. This is the page where you list all the employees that will be able to enter expense transaction on behalf of the traveler. Please note that the SMART system auto populates this page with the travelers' user id and name. These values should not be deleted or modified.

</td></tr>
</table>

Step	Action
9	Click the + button to add a new row. 
10	Enter the user id of the person that will be a proxy for the traveler. ***You can add multiple proxies for a single traveler.  Click save and Ok. 
11	The new expense payee should now be accessible through the Employee Self-Service navigation.