

General Expense Report Management Expectations

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When submitting expense reports, please ensure:

- Expenses are business-related, reasonable, and necessary
- Receipts are attached and clearly legible with your signature on the receipt
- Descriptions (Business Purpose) are clear and detailed
- Coding is reviewed for accuracy before submission
- Expenses are submitted promptly and within required timelines
 - Sage Intacct expenses are loaded multiple times a month - please ensure you are checking for these every couple days, a reconciled expense report is REQUIRED at least once per week
 - Wells One expenses are usually available within 24-48 hours of purchase. Please ensure you are cleaning these up every couple of days, your inbox should be cleared at least weekly
 - Approval workflows are turned on for each of these expense platforms - please ensure as APPROVERS you are cleaning these out at least a few times a week. Be critical, send back is wrong, hold your team accountable for accuracy (you wrote the budget!).
 - ***Failure to complete timely expense reconciliation may result in loss of buying/spending power and/or disciplinary action up to including termination.**
- Please plan accordingly for LOA, FMLA, and/or PTO coverage. You can request proxy support for someone to manage your expenses and approvals in your absence. Please reach out to Accounting for assistance.

Expense reports that do not meet these requirements may be rejected and returned for revision. If you have questions about cost codes, GL accounts, or expense policies, please reach out to your manager before submitting expenses.

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