

Concur “Supervisor” Approver Role Request Form

Information about this Role:

Departments have the option of adding the appropriate Supervisor Approver to the employee’s Concur profile in accordance with any internal/department procedures. This optional role can provide departments with additional control and visibility to the Request & Expense process.

If there is a Supervisor Approver listed in the employee’s profile, the Concur document will route for Supervisor Approval first before entering the standard approval workflow. For more information about this role, please review this [Blink](#) site.

Instructions: complete the information below, obtain required signatures, and attach the completed form to a UC San Diego [Services & Support](#) case - Budget & Finance, Get Help, select “Submit a Ticket to Budget and Finance Support”, skip to the More Specifically field and select “Concur (Access or Role Inquiries)”, and type the short description of “Concur Supervisor Approver Role Request Form”

Proposed Supervisor Information:

NAME:	First	Middle	Last
DEPARTMENT NAME:	WORK PHONE:	EMAIL ADDRESS:	
EMPLOYEE ID NUMBER (must be a UCSD employee)	PAYROLL TITLE:		
Add as Request Approver?	Yes or No	Add as Expense Approver?	Yes or No

Please Note:

- This is an optional role and can be added at the discretion of the department.
- This role is called “Default Approver” under Request Approvers and Expense Approvers in one’s Concur Profile Settings. *Note that “Default Approver 2” under Request Approvers is reserved for Procurement Card Department Administrators.*
- **Only one default approver/Supervisor can be added per employee.** Multiple supervisors cannot be added for each employee.
- When a Request or Expense Report is “Pending Supervisor Approval” and the designated Supervisor is out of the office for an extended period, the transaction will stay pending until they return and approve it.
 - o To temporarily remove or change the supervisor in the employee’s profile, submit a Services and Support case.
 - o Once a supervisor role is removed or changed, one should recall the pending Request or Expense Report and resubmit to reset the workflow process.

Employee Printed Name (<i>whose Concur Profile this Supervisor role will be added</i>):	Date:
Employee ID Number (from UCPath):	
Employee Signature:	

Supervisor Printed Name:	Date:
Supervisor Signature:	

Financial Unit Approver Printed Name:	Date:
Financial Unit Approver Signature:	