ADMINISTRATIVE POLICY

MCC One-Up Expense Approval

Policy Type: FINANCE
Policy Owner(s): Finance Manager
Policy contacts: Andrea Johnson
Revised: 11/1/17
Reviewed: 4/10/18
Effective Date: 11/1/17

POLICY STATEMENT

Provides MCC specific policies and examples in addition to UMN Policy: https://policy.umn.edu/finance/approvalsrouting

It applies to all travel & hospitality expenses (reimbursement or p-card); reimbursement expenses. It does not apply to standard purchases of office/lab supplies/services made via p-card or EFS requisitions.

General rule: the supervisor and/or person responsible for the funds needs to approve their subordinates’ expenses.

Lab Scenarios for PI and lab staff travel/reimbursement:
● A PI using his/her own funds must sign the paperwork. One-up approval is delegated to the EFS approver, so no other approval is necessary.
● A PI using another PI’s grant should be signed by both the individual who incurred the expense, as well as the PI of the grant.
● Lab staff members using U of M funds need to sign the paperwork, as does the PI of the funds used.

Administrative Scenarios for staff travel/reimbursement:
● Signatures by individual and their unit manager:
  ▪ CTO: Katie Mellskog – can delegate to Mo Morris
  ▪ CISS: Ahmad AbuSalah – can delegate to Michelle DeMist
  ▪ Other ISOS: Faculty ISO director – can delegate to ISO/Lab manager
  ▪ Admin: Jean Jacoby
  ▪ Communications: Max Huber
  ▪ Community & Education: Kiara Ellis
  ▪ Finance: Andrea Johnson
  ▪ HR: Melissa Daufelt
  ▪ MNCCTN: Marie Rahne
  ▪ Operations/Research Development: Aaron Schilz
  ▪ Administrative Managers: Seanne Falconer
● Seanne Falconer/ Administrative Director: Signature by individual and Dr. Yee (cannot be delegated down, as all admin staff and approvers ultimately report up to Seanne)
Dr. Yee/Director: Everything gets one-up approval from AHC. This is University policy for all deans and directors.

Helpful Links:
https://policy.umn.edu/
https://travel.umn.edu/