FAQs for Spend Authorization (SA)

- **When is a SA required?**
  - A SA is required <u>prior to</u> using a PCard or out of pocket funds for a purchase of $10,000 or more. Alternatively, use a Purchase Requisition to order goods or services of $10,000 or more, receive items in Workday and forward invoice to Accounts Payable.

- **How do I create or retrieve a SA?**
  - Use the Expenses Hub to view or create SAs.

- **Can somebody create a SA for me?**
  - Yes, a WPI employee may create a SA for another WPI employee using the task 'Create Spend Authorization for Worker'.

- **Can somebody create expense report for the SA which I created?**
  - No, you must create your own expense report unless the Dean or VP has approved another worker to create expense reports on your behalf.

- **Is a SA required on grant/gift funds?**
  - Yes, a SA is required prior to using a PCard or out of pocket funds for any purchase of $10,000 or more regardless of the funding source.

- **How will I know the balance of my SA?**
  - Use the Expenses Hub to view SAs. The balance and other pertinent info will display.

- **What if I need to change my SA?**
  - In the Expenses Hub under the Spend Authorizations tab, click the Actions button next to the SA and then "Change Spend Authorization".

- **How do I apply a SA to an expense report?**
  - When creating an expense report, select "Create New Expense Report from Spend Authorization". Your list of available SAs will appear in the drop down box to select.

- **Can more than one expense report be created for the same SA?**
  - Yes. The SA balance will continue to decrease as expense reports are submitted against it. You may not submit an expense report against a SA with a negative balance.

- **If "final expense for SA" box is checked, will SA be closed automatically?**
  - Yes, the SA will close and any unused funds will be returned to the budget.

- **Do SAs go through budget check?**
  - Yes, SAs using operating funds go through budget check.

- **What is the approval queue for a SA?**
  - If the purchase is related to technology, it will route to IT for approval. All SA route to a Manager and Cost Center Manager and if over $10,000 to the Budget Office. Cash advances are approved by the AP Manager and Controller.