FAQs for Spend Authorization (SA)

- **When is a SA required?**
  - A SA is required prior to using a PCard or out of pocket funds for a purchase of $1,000 or more from WPI operating funds, 110-FD. Alternatively, use a Purchase Requisition to order goods or services of $1,000 or more, receive items in Workday and forward invoice to Accounts Payable.

- **How do I create or retrieve a SA?**
  - Use the Expenses worklet 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?**
  - No. A SA is required when using operating funds (110-FD), but optional when using other funds such as grant, gift, internally designated and student activity funds.

- **If "final expense for SA" box is checked, will SA be closed automatically?**
  - No, the SA will not close automatically. SAs will be reviewed and closed periodically.

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

- **What if I need to change my SA?**
  - You may change a SA by clicking on the three dots next to the magnifying glass and select SA Change. Type "My Spend Authorizations" in the search bar to see your SAs and the magnifying glass.

- **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.

- **What is the approval queue for a SA?**
  - If the purchase is related to technology, it will route to IT for approval, then to a Manager, Cost Center Manager and if over $2,500 to Budget Office. Cash advances are approved by the AP Manager and Controller.