

October 27, 2014

Issue 8

Insurance Purposes Only (IPO) Requests

Enter as a Request. Do not use an Expense Report.

Click on the New Request button to begin the Request. The Request header screen appears.

- Enter – IPO and the date of your travel in the Request Name - for instance IPO 10/16/2014.
- Enter the Start Date and End Date and Purpose. You must choose an account code even though there will be no reimbursement.
- Click Save at the top right-hand of the screen.

- This will take you to the Segments tab screen. Skip this screen by clicking on the Expense tab beside the Segments tab.
- Choose the Miscellaneous expense type from the expense menu on the right-hand side of the screen.
- Enter the transaction date of your travel and leave the transaction amount as zero. Click the blue Save button at the bottom right-hand of the screen.
- Click the blue Submit Request at the top right-hand of the screen. It will route to your approver for approval.

- After the travel has occurred. Click on the Request to Open it and click on the Close Inactivate/Request. You will not complete an Expense Report.