New Alerts added to GET to support Policy 201 Travel’s Accountable Plan

The alerts are to support the 90 day Accountable Plan policy found in Policy 201 Travel. Please see below for details describing how GET will behave based on the specific situation.

Reports for Employees

Travel related report
- **Creating the expense report** – When a *trip end date* is entered, that is over 90 days from the current date GET will alert the person entering the expense report the report is not compliant with the Accountable Plan, which includes a link to the policy. At this point, the creator of the report (Traveler or Alternate) can decide to continue entering the expense report or cancel entry.
- **Submitting the expense report** – When the ‘Submit’ button is clicked the Traveler will receive an alert informing them the expense report is not compliant with the policy and an exception document should be attached to continue submission.

Non-travel related report
- **Creating the expense report** – When an *expense date* is entered that is over 90 days from the current date GET will alert the person entering the expense report the expense is not compliant with the Accountable Plan, which includes a link to the policy. At this point, the creator of the report (Traveler or Alternate) can decide to continue entering that expense line or cancel entry.
- **Submitting the expense report** – When the ‘Submit’ button is clicked the Traveler will receive an alert informing them the report should have an exception document attached. If the report contains expense lines where some are over 90 days and some are not – GET will still alert the traveler that an exception document must be attached to the report.

Reports for Non-Employees

Travel related report
- **Creating the expense report** – When a *trip end date* is entered that is over 90 days from the current date GET will alert the person entering the expense report that the report is not compliant with the Accountable Plan. Since there are no exceptions for non-employee expense reports over 90 days, the Alternate will not be able to continue creating the expense report.
- **Submitting the expense report** – When the ‘Submit’ button is clicked GET will check to see if the *trip end date* is over 90 days from the current date. If the *trip end date* is over 90 days GET will not allow the expense report to be submitted.

Non-travel related report
- **Creating the expense report** – When an *expense line* date is entered that is over 90 days from the current date GET will alert the Alternate the report is not compliant with the Accountable Plan. Since there are no exceptions allowed for non-employee expense reports over 90 days, the Alternate will not be able to continue entering the expense line.
- **Submitting the expense report** – When the ‘Submit’ button is clicked, if the expense report contains any expense lines that are over 90 days, even if some expense lines are not over 90 days, GET will not allow this expense report to be submitted. Expense lines over 90 days will need to be deleted before the Alternate can submit the report.

**Note:** In all cases where the traveler received the exception alert upon submission, GET will feed a note to the Approver and Auditor informing them the expense report was submitted outside of the 90 days. This note is fed into the Business Purpose field within the expense report.