How to Submit an Expense Report in CardQuest

Summary
This guide will explain how to submit a report that has been prepared for you by a delegate. Your delegate is someone that has been assigned to your profile in CardQuest and has the ability to create your expense reports in CardQuest. If you would like the ability to submit your reports via the mobile app, please email cardquesthelp@caltech.edu and request mobile app instructions.

Procedure

Step 1
1a) Log in to access.caltech at:
https://access.caltech.edu
1b) Click on the CardQuest link from the list of applications in access.caltech then log in to CardQuest using your access.caltech credentials.

Step 2
After hitting the Continue button in step 1b, you will be taken to the CardQuest home page.

Under Open Reports, find and click on the report that your delegate has informed you is ready for submission.
Step 3
After clicking on the report name in Step 2, the report will open.

Please review the charges in the report to certify that the report correctly describes the actual amount of allowable business expenses incurred in the performance of your assigned duties.

After reviewing the charges, hit the Submit Report button. The report has now been submitted and automatically transmitted to your Approver for their review.

Exceptions
1. If corrections are needed before submitting the report, you can either make the corrections yourself in the report or let your delegate know the changes that are needed so they can make them for you.

2. If you received any errors or warnings after hitting Submit Report (for example, missing receipts or allocations) you can make the corrections yourself or contact your delegate so they can make the necessary corrections before you submit your report again.

3. If your Approver sends back the report with a request for more information, your delegate will have received an email notification and will work with you to make the changes to the report. After the necessary changes have been made, you can submit the report again.

CardQuest Help
Visit the CardQuest webpage: https://procurement.caltech.edu/cardquest/
Email us your questions: cardquesthelp@caltech.edu
Call the Procurement Services Hotline: (626) 395-8900

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