

TUESDAY'S LIVE TOP TIP



OUR WEEKLY DOSE OF SMART BUSINESS AND FINANCE TOP TIPS



Check System Approval Limits match your Delegated Authorities

Why?

Turn Policy Into Practice

- Align electronic workflows with approved financial limits.
- Prevent users approving transactions above their authority.

Keep Them Current

- Update workflows when roles or responsibilities change.
- Periodically test that approval routes operate as intended.

Benefit

Your financial procedures may contain clear delegated limits, but those limits are less effective if the finance or purchasing system allows staff to approve transactions above their authority.

Configuring workflows to match approved delegations embeds the control into everyday processes rather than relying solely on staff remembering individual limits. Review settings following restructures, promotions and changes in responsibility to ensure transactions continue to reach the correct person for approval.

Useful Resources

- Academy Trust Handbook
- DfE – School Resource Management Guidance