



# Chrome River Travel & Expense

## Pre-Approval Quick Guide

September 2021



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This Guide will give you the basics needed to use Chrome River Travel & Expense application. Detailed user guides are available in the Chrome River Help Center (See Appendix ???)

## Launching and Logging into Chrome River

Chrome River is accessible via:

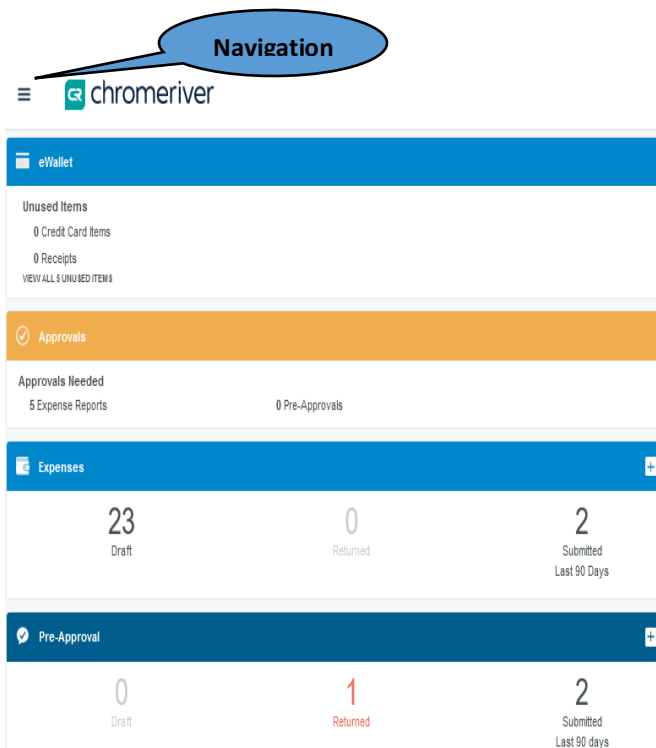
- mymemphis portal, within the Employee Tab
- <https://chromeriver.memphis.edu> with your University of Memphis Single Sign On (SSO)
- Mobile devices

The following are recommended for use in their most recent versions:

- Google Chrome           Version 51.0 or higher
- Safari                      Version 9.1 or higher

## Chrome River Landing Page

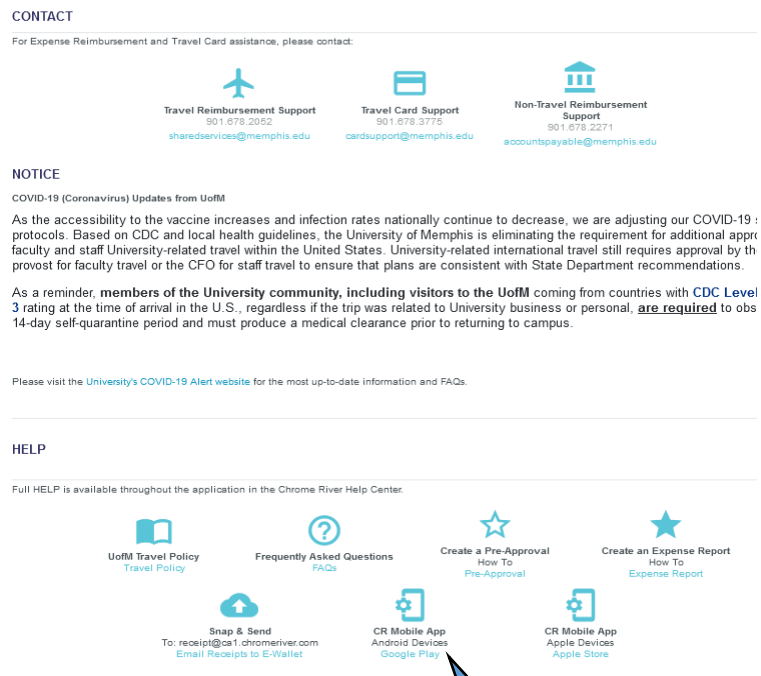
Once you have logged into the Chrome River application, you will be presented with the Chrome River Landing Page. You will find the **Navigation Bar** (hamburger menu) at the upper left of the screen, the **Dashboard** to the left, and **UofM logo** to the right.



**Navigation**

**Navigation Bar**

**Dashboard**



**CONTACT**

For Expense Reimbursement and Travel Card assistance, please contact:

- Travel Reimbursement Support (901.678.2052, shareservices@memphis.edu)
- Travel Card Support (901.678.3775, cardsupport@memphis.edu)
- Non-Travel Reimbursement Support (901.678.2271, accountspayable@memphis.edu)

**NOTICE**

COVID-19 (Coronavirus) Updates from UofM

As the accessibility to the vaccine increases and infection rates nationally continue to decrease, we are adjusting our COVID-19 protocols. Based on CDC and local health guidelines, the University of Memphis is eliminating the requirement for additional approval for faculty and staff University-related travel within the United States. University-related international travel still requires approval by the provost for faculty travel or the CFO for staff travel to ensure that plans are consistent with State Department recommendations.

As a reminder, **members of the University community, including visitors to the UofM** coming from countries with CDC Level 3 rating at the time of arrival in the U.S., regardless if the trip was related to University business or personal, **are required** to observe 14-day self-quarantine period and must produce a medical clearance prior to returning to campus.

Please visit the University's COVID-19 Alert website for the most up-to-date information and FAQs.

**HELP**

Full HELP is available throughout the application in the Chrome River Help Center.

- UofM Travel Policy
- Frequently Asked Questions (FAQs)
- Create a Pre-Approval (How To Pre-Approval)
- Create an Expense Report (How To Expense Report)
- Snap & Send (To: receipt@ca1.chromeriver.com, Email Receipts to E-Wallet)
- CR Mobile App (Android Devices, Google Play)
- CR Mobile App (Apple Devices, Apple Store)

**Dashboard**

## Direct Deposit Reimbursements

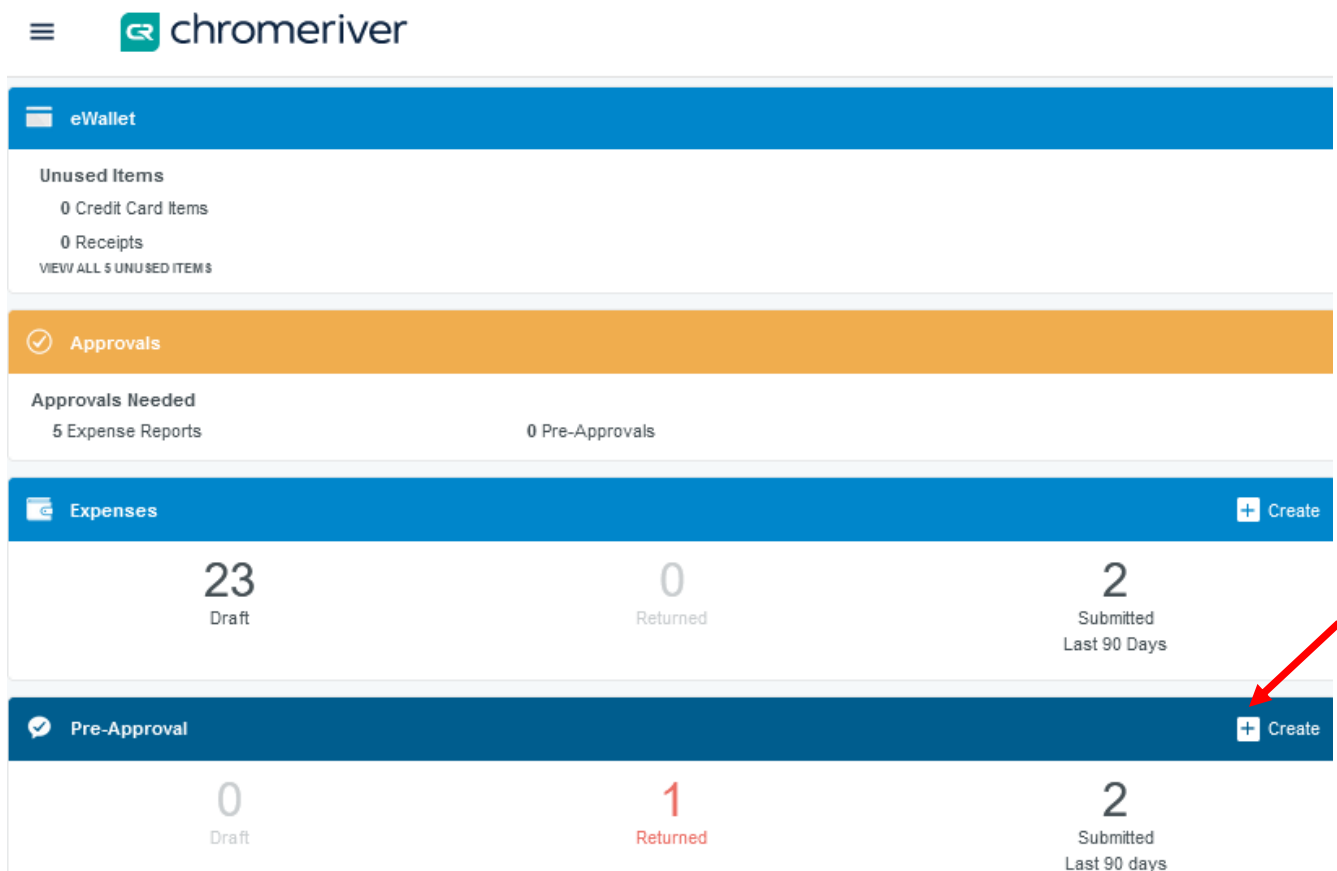
Direct Deposit is the University preferred method for travel reimbursements. If you choose to not participate in direct deposit payment, you will be notified by email when your check is ready for pick-up in 275 Admin. University or state picture identification will be required for check-pick-up.

### 1.0 Creating and Submitting a Pre-Approval

Pre-Approvals allow you to obtain travel authorization for a trip before a reservation is made and the expense is incurred.

#### 1.1 Create a New Pre-Approval

From the Dashboard, scroll to the **Pre-Approval** section and click on:

The screenshot shows the Chrome River dashboard with the following sections:

- eWallet**: 0 Credit Card Items, 0 Receipts. [VIEW ALL 5 UNUSED ITEMS](#)
- Approvals** (highlighted in orange): Approvals Needed: 5 Expense Reports, 0 Pre-Approvals.
- Expenses**: 23 Draft, 0 Returned, 2 Submitted Last 90 Days. [+ Create](#)
- Pre-Approval** (highlighted in orange): 0 Draft, 1 Returned, 2 Submitted Last 90 days. [+ Create](#) (indicated by a red arrow)

#### 1.2. Create Pre-Approval Header Entry filling in appropriate fields:



**Report Name:** (ex: name of conference yyyy)

**Start/End Dates:** Start and end dates of travel

**Number of Days:** Automatically determined by Start and End dates

**Business Purpose:** The purpose of the trip

All fields noted in 'red' are required.

Report Name	<input type="text"/>
Start Date	<input type="text" value="06/11/2020"/> 
End Date	<input type="text" value="06/11/2020"/> 
Number of Days	<input type="text" value="1"/>
Business Purpose	<input type="text"/>
	Required
Pre-Approval CANNOT be submitted for Non-Travel Expenses	
BlanketTravel <small>Optional</small>	<input type="text" value="-- Select --"/>
Personal Days?	<input type="checkbox"/>
Are you attending a conference?	<input type="text" value="-- Select --"/>
	Required
If attending a conference, be prepared to attach documentation showing conference dates, city and conference lodging rates.	

### 1.3 Attaching Documents

If you indicated you are attending a conference, proof of the conference, location and dates are required. Attach a screen shot of the website or an email with this information included.

Is this expense for research-purposes?	<input type="text" value="-- Select --"/>	
	Required	
Affiliation	<input type="text" value="-- Select --"/>	
	Required	
Travel Type	<input type="text" value="-- Select --"/>	
	Required	
Report Type	<input type="text" value="-- Select --"/>	
	Required	
Not all locations are listed. Please select the closest metro-area to your destination.		
Destination	<input type="text" value="-- Select --"/>	Note: Enter the city only and wait for drop down
	Required	
Travel Risk Rating	<input type="text"/>	
	Required	
List Any Additional Destinations <small>Optional</small>	<input type="text"/>	
Travel Card Request	<input type="text" value="-- Select --"/>	
	Required	
Enter the Index or Description in the allocation box below. As you type, a drop down list of matching items will be displayed for selection. If the expense is being charged to multiple indexes, enter the primary index below and click 'Save'. Multiple allocations cannot be entered until all expenses have been identified on the next form. You will return to this form to add additional funding sources by clicking on 'Add Allocations'.		
<b>Allocations</b>		
<input type="text" value="Search for Allocation"/>		
Please select an allocation.		

**Allocations:** Enter the Index or Description in the allocation field. As you type, a drop-down list of matching items will be displayed for selection. If the expense is being charged to multiple indexes, enter the primary index below and click **Save**. Multiple allocations can only be entered after all expenses have been identified on the next form. You will be able to return to this form to add additional funding sources by clicking on **Add Allocations**.

### Allocations










  
[+ Add Allocation](#)

Once you have filled out the header information, click **Save** and you will be able to add potential expenses.

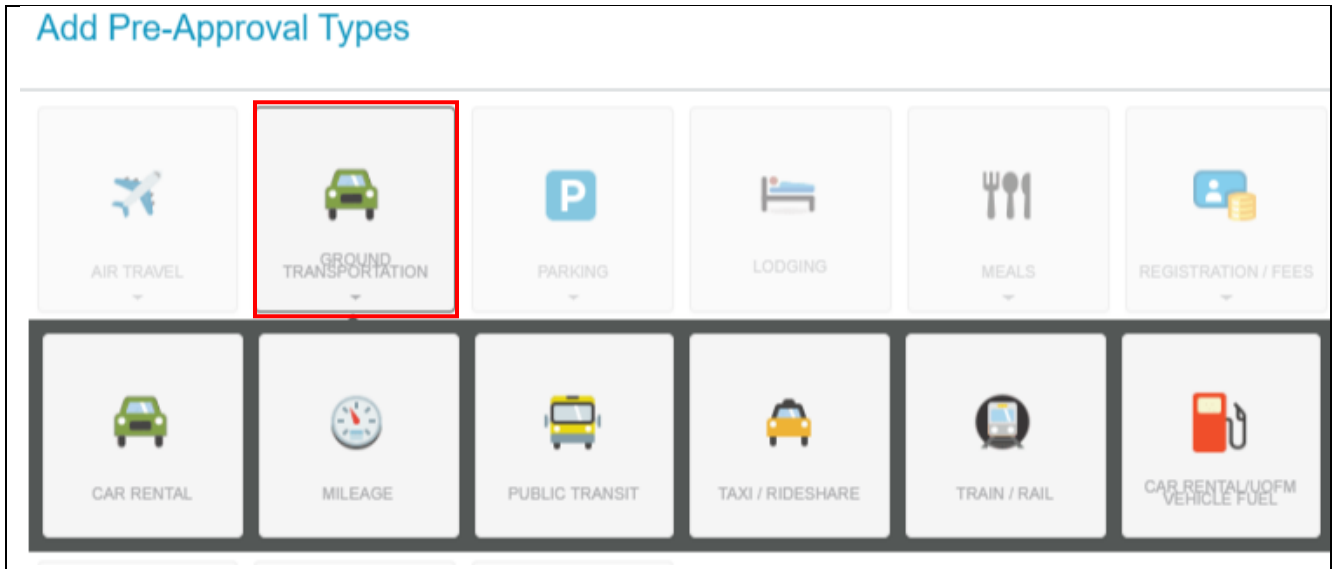
## 2.0 Pre-approval Types (icons)

'Add Pre-Approval Types' screen will open on the right with the expense tiles.

### Add Pre-Approval Types

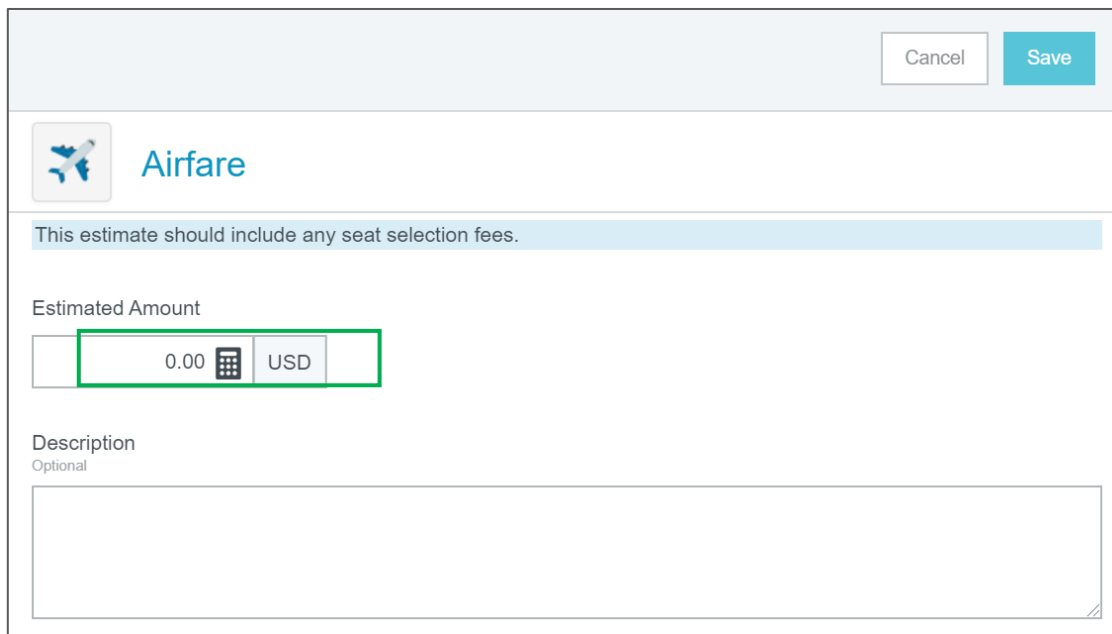
 AIR TRAVEL	 GROUND TRANSPORTATION	 PARKING	 LODGING	 MEALS	 REGISTRATION / FEES
 MISCELLANEOUS / OTHER	 BLANKET TRAVEL	 ENTIRE TRIP ZERO COST TO U OF M			

Some expense tiles may have more expense types inside them as shown below.



## 2.1 Adding Expense types

Tapping on an expense-type tile takes you to the Add Expense screen for that type. Enter the required information and tap **Save**. Repeat for each expense type.












The screenshot shows the 'Add Expense' screen for 'Airfare'. At the top right, there are 'Cancel' and 'Save' buttons. The main title is 'Airfare' with an airplane icon. Below the title, a light blue banner contains the text: 'This estimate should include any seat selection fees.' Underneath, the 'Estimated Amount' is displayed as '0.00 USD'. At the bottom, there is a 'Description' field with the label 'Optional'.



2.2 Submit - once all expenses have been added, tap Submit.

### Higher Ed Conference Indianapolis 2020 (i)

0 Comments   0 Attachments

EXPENSE	ESTIMATED
 Airfare	350.00 USD
 Baggage Fee	60.00 USD
 Airport Parking	50.00 USD
 Meals - Per Diem	53.25 USD
 Meals - Per Diem	71.00 USD
 Meals - Per Diem	71.00 USD
 Meals - Per Diem	71.00 USD
 Meals - Per Diem	53.25 USD
 Miscellaneous / Other	50.00 USD

PA Report ID  
010000426447

Total Estimated Amount  
**829.50** USD

Submit

Verify the Expense Summary and click **Submit** again on the Submit Pre-Approval page.

## Submit Preapproval

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

To Date 05/15/2020

Business Purpose conference

### Expense Summary

	AMOUNT (USD)	SUBMITTED (USD)
Airfare	350.00	0.00
Airport Parking	50.00	0.00
Baggage Fee	60.00	0.00
Meals - Per Diem	319.50	0.00
Miscellaneous / Other	50.00	0.00
<b>Total</b>	<b>829.50</b>	<b>0.00</b>

### Account Summary

		AMOUNT (USD)
265210	University Process Improvement University Process Improvement	829.50
<b>Total</b>		<b>829.50</b>

### 3.0 Blanket Pre-Approval

Create Blanket Pre-Approvals for a specific time period, for individuals who will be submitting multiple expense reports throughout the semester or the fiscal year. Example: Faculty/staff who travel numerous times to teach or work at satellite locations and claim mileage. A single pre-approval can be imported for each new expense report, therefore indicating the remaining balance. Expense reports can be submitted for each trip, monthly or for the semester.

### 4.0 Compliance Warnings and Violation Messages

After saving an expense, you can see the status of the expense in the status column. If the status icon is a green checkmark, then the expense is all set and requires no further action until submission

Sometimes, you may see an orange or red icon in the status column. This indicates that the expense has failed a compliance rule and requires additional actions before proceeding. Chrome River enables us to build in policy Compliance Rules to ensure expense reports are within policy.

An **orange icon** indicates a compliance warning

A compliance warning indicates that additional information is required before the expense can be submitted for approval and processing. Click on the orange warning symbol and either modify the data or enter a reply. Then click Save to proceed.

A **red icon** indicates a compliance violation

A compliance violation indicates that the expense cannot be submitted for approval and payment based on the University's policies as defined in the system. To clear the violation, select the expense line, make any required changes, and click Save to proceed.

### Submit Preapproval

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

**⚠ Travel requested to location with an 3-4 elevated risk rating.** #612  
Provide explanation for travel.

**Add Response**

Please enter a response...