<u>How to Create a Pre-Approval Report for Sponsorships</u>

Sponsorship pre-approvals should be done under the Department profile or under the traveler who is utilizing a ticket purchased through a sponsorship.

1) Once logged into Chrome River, click on the **+Create** button in the upper right-hand corner of the Pre-Approval ribbon.

2) Complete the required fields of the report header.

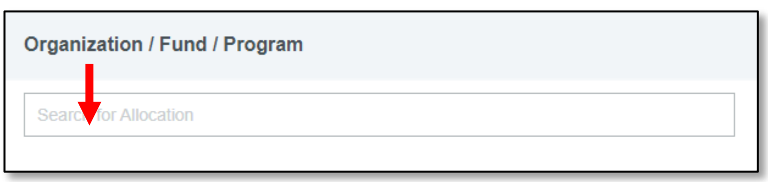
<u>Department Sponsorship Request</u>

- **Report Name** = Sponsorship Name
- **Business Purpose** = What is the benefit to the University? What is included with the sponsorship?
- **Report Type** = Sponsorship
- **Trip Type** = 731083 Sponsorships

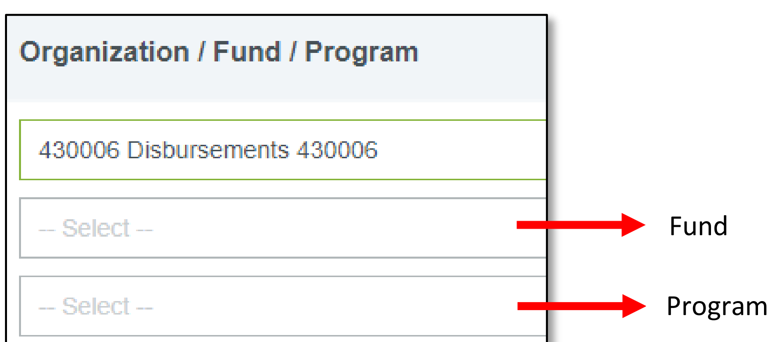
<u>Attendee utilizing ticket</u>

- **Report Name** = Sponsorship Name
- **Business Purpose** = Why is the attendee going to the event?
- **Report Type** = Employee
- **Trip Type** = 731083 Sponsorships

3) After completing the required fields, input your org name or number and select it from the drop-down.

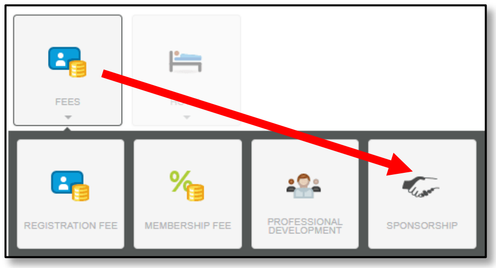


4) Once the org has been selected, two additional fields will appear. In the second box, input the fund number and select the fund from the drop-down. In the third box, input the program number and select it from the drop-down.



5) Click Save in the upper right-hand corner OR if the cost of this request needs to be split, click on **Add Another Allocation** to input another org/fund/program and then click Save. **TIP** – if you added another allocation, leave the percentage at 50/50. Once you have added your total estimated amount you can go back and input the exact dollar amount for each allocation.

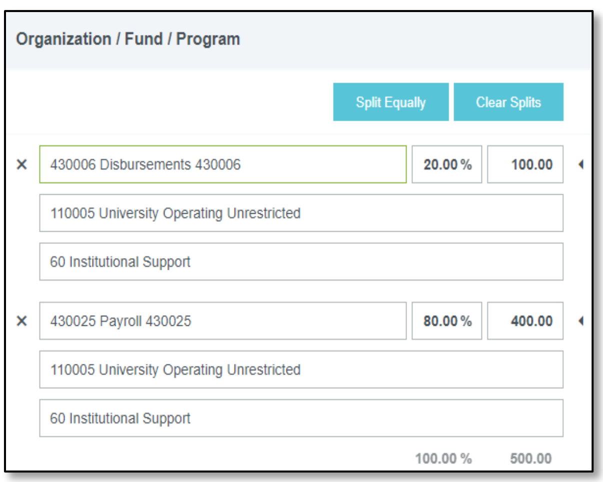
6) Click on the Fees tile and select Sponsorship.



7) Input the dollar amount in the Estimated Amount field, include a description of what the amount will cover, and click Save. Or, if this report is for an attendee, Input an expense line item of $1 if there will be no additional expenses incurred for the employee

8) Click on your report name in the upper left-hand side and that will bring up your report header on the right-side. Scroll all the way down on your report header to attach backup documentation.

9) Click the green Submit button if you are ready to submit, OR if you added another allocation and need to split the cost, click Edit, scroll down to the bottom of the report header and adjust the dollar amounts as needed for each allocation (do not adjust the percentages as they will update after you input the dollar amounts). Then click Submit.



10) Once the pre-approval report has been approved, if you would like to use the Pcard to charge expenses, email pcard@stockton.edu with the last 4 digits of the Pcard and the card will be modified to allow for the charge to be processed.