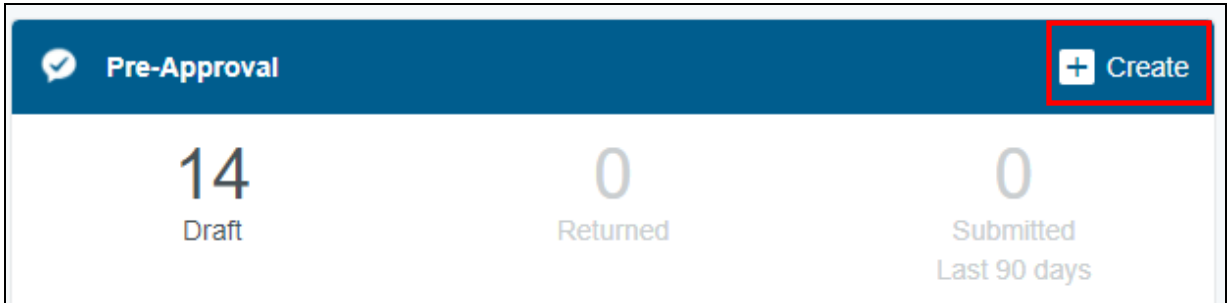


How to Create a Pre-Approval Report for Travel

1. Log into Chrome River. If you are a Proxy, click on your name in the upper right-hand corner and then click on the traveler's name.
2. Click on the **+Create** button in the upper right-hand corner of the Pre-Approval ribbon.



3. The required fields on the Pre-Approval Header Entry screen will vary based on the Report Type. Once you have chosen your report type, you will not be able to change it. In addition to the report type, the following fields will always be required:
 - **Report Name:** Name of the training/conference/event/description of what the report is for.
 - **Start/End Dates:** Dates of travel. Blanket reports can cover a specified date range or cover the fiscal year (7/1 – 6/30).
 - **Number of Days:** Automatically determined by Start and End dates.
 - **Pay Me In:** Defaults to US dollars.
 - **Business Purpose:** Please be as detailed as possible. If your report is a blanket, include everything the report is covering.
 - **Divisional Executive:** Select from drop-down.
 - **Report Type:** Select from drop-down.
 - **Employee** – select if the traveler is an employee.
 - **Student** – select this for student reports (“SU Student” user) or if you are an employee traveling with one student.
 - **Candidate or Non-Employee** – if you are selecting this report type, your report should be done under the “SU Candidate” user.
 - **Student Group Travel** – select this for student group reports (“SU Student” user) or if you are traveling with a group of stud.
 - **Employee Group Travel** – only select this when an entire department is attending an event such as a retreat.
 - **Are you attending this event for scholarly purpose (teaching or research):** Choose Yes or No.
 - **Honorarium Question:** Choose Yes or No.
 - **Trip Type:** Select your travel-related account code from the drop-down. Reach out to your support staff if you are unsure of your account code.
 - **Check box if you are presenting.**

- **Official Campus Location:** This refers to where the traveler works – select from the drop-down.
- **Trip Destination:** Select from the drop-down.
- **Departure/Return Time:** Select from the drop-down.
- **Organization/Fund/Program:**
 - Input your org name or org number and select it from the drop-down.

Organization / Fund / Program

Search for Allocation

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

Organization / Fund / Program

430006 Disbursements 430006

-- Select -- Fund

-- Select -- Program

- You may also divide the request among multiple allocations by clicking ADD ALLOCATION. **If you are unsure of your org/fund/program, select 000000 Temporary and email your Proxy to let them know. DO NOT submit the report. Save it as a draft and your Proxy can correct and submit on your behalf.**

4. Click Save.

5. The Add Pre-Approval Types screen will slide in from the right. Click the + Button will also bring up the Pre-Approval types.

CHROME RIVER

+ New Stacey Harnett

Pre-Approvals For Stacey Harnett

3/23/18 Ellucian Conference

EXPENSE ESTIMATED

Click "+" to add your first item.

Add Pre-Approval Types

AIR TRAVEL

TRANSPORTATION

MEALS

TRAVEL EXPENSES

GROUP TRAVEL

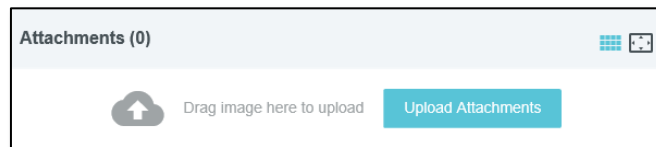
FEES

HOTEL

6. Clicking on an expense tile will give you additional categories for that expensetype.

TIPS ON ADDING EXPENSES

- If you will be requesting a university vehicle, select Transportation > University Vehicle and input \$1 in the estimated amount to add it to your report.
 - Personal Vehicle Mileage:
 - Use the embedded Calculate Mileage link to bring up Google Maps
 - Ensure you are calculating mileage for round-trip
 - Use the IRS mileage rate (unless the travel is grant-related and the state rate is being reimbursed)
 - Use all tiles under the Group Travel tile when submitting a report for a group.
 - Input the website of the conference/meeting in the Website field under Fees > Registration Fees.
 - Under the Meals tile, use the Per Diem Wizard widget to have the system automatically calculate the per diem rate based on your location and dates of travel.
 - To submit a report for an event that is free of charge, add the Travel Expenses > Other Travel Expenses line item for \$1.
7. After adding all potential expenses, click on your report name on the left-hand side to bring up the report header preview. Scroll down and you will see a section to post any comments as needed. You will also see a section to add attachments. Backup documentation such as a flyer, invite, agenda must be attached to all reports (only blanket reports do not require backup).



8. When you are ready to submit your request, click on the green Submit button at the bottom of the entry screen. You will receive a certification message and must click Submit again. All reports will receive a "Scholarly Purposes" reminder message. This is a reminder to complete the RAAE form as needed. You must type a response to the message (ex: completed, OK, N/A) and then click Submit again. The RAAE form does not need to be attached in Chrome River.

You may receive additional reminders or compliance warnings. This indicates that additional information is required before the report can be submitted. Respond by either modifying the data on your report or replying to the warning, and then clicking on Submit.

9. You will receive an email if your report has been returned for correction and when your report has been fully approved. Returned reports will have a comment regarding why the report is being returned. Locate the report from your dashboard, make corrections as needed and resubmit the report for approval.

If your report has been fully approved and you would like to charge an expense to the Pcard, forward the approval email to pcard@stockton.edu, provide the amount to be charged and the last 4 digits of your Pcard.