Chrome River Basics	This is the new travel reporting system, implemented 2023. Travelers will complete travel pre-approvals (formerly TAs) and expense reports in Chrome River.	Contact your department EA for assistance

- Travelers start from Pipeline's Chrome River link
- Travelers will start new a pre-approval, including all of the expected costs for out-of-state and out-of-country travel. (In state doesn't require pre-approval)
- At the end of the page, there is an ALLOCATIONS section. This is where the traveler puts in the index to which their travel will be charged. As the user adds indexes & amounts, Chrome River will tally the total amount and percentage allocated to each index. At the end of the process, the traveler should go back and verify that you entered the right the dollar amounts as needed for each index code in the Allocations section.
    - They will need to input the appropriate index for every area from which they are getting $$ (department, dean, provost, grant, etc.). It *can* do an index look-up, but some business units have multiple indexes, so make sure your travelers know to get the index info they need from the get-go.
    - **<u>When the traveler will be paying part of the travel out of pocket, they must put in a line for that in ALLOCATIONS, & rather than an index, they input NONREIMB Non-Reimbursable Cardholder Responsible</u>**
    - The traveler no longer needs to know the account code (i.e., out-of-state/international); the system knows that AND it knows the chain of approvers – no need to input those anymore either
        - The system will always start the approvals with the traveler's supervisor, then it will route appropriately based on indexes listed in the ALLOCATIONS section and the traveler's organization hierarchy.
        - If your department's EA reviews pre-approvals & expense reports before they are submitted, then faculty will have to set up the EA as a "Delegate" and then email the EA to let them know to review the pre-approval. The EA can review & then submit on behalf of the traveler.
            - The "Delegate" only has to be set up once, FYI
            - The traveler will click on their name in the upper right corner of the landing page, then Account Settings→Delegate Settings→New Delegate
    - **<u>Tip:</u>** pre-approvals will NOT allow revisions once completed, so once it's approved, it's set (don't revise if the traveler gets additional funding after they've gotten pre-approvals finalized – and don't do a new pre-approval. Just add those new funds/indexes to the expense report.)
- When they return, travelers will create a new expense report
    - The system lets the traveler IMPORT the approved pre-approval into a new expense report
        - **<u>Tip:</u>** in-state travel does not require the use of IMPORT since pre-approval is not required.
    - The traveler can upload their receipts directly into to the system & attach them to the expense report (see tip about mobile apps below)
    - If a traveler has gotten new funds since the pre-approval, they should TRIPLE check that they've added the additional index(es) and allocated the right amounts to each index on the expense report. It defaults to putting the whole amount in the initial index.
- **<u>Tip</u>**: there are MOBILE APPS (WOOT!) that will allow travelers to do all of their receipts & reporting from their mobile device – they can upload receipts to Chrome River's "wallet" and then attach the receipt to the expense report right there in Chrome River.
    - Everyone will need to add their personal email address to their profile (under settings) if they will be forwarding receipts from their personal email account to their Chrome River wallet (i.e., Uber receipts).

REMEMBER: If the traveler did the initial TA in Dynamic Forms,
the Expense Report MUST be done in Dynamic Forms