



Chrome River – Pre Approvals

New web-based travel request and expense system provided by LCTCS

Chrome River is the Expense Management System chosen by LCTCS to replace the “Request for Official Travel” and “Travel Reimbursement Request Form” documents. This session will introduce you to Chrome River, a web-based, easy-to-use system where you will create Pre-Approval (PA) documents, submit them for electronic approvals, and be notified via email once they have been fully approved. Those who approve these Pre-Approvals will be able to do so with the Chrome River system or via email. This session will show how that is accomplished.

Also included in Chrome River is the expense side which is called the Expense Report (ER) document. Those who approve Expense Reports will learn that the methodology is similar to approving Pre-Approvals, but with fewer approval levels. Any reimbursements due to the traveler will be automatically loaded into Banner Accounts Payable to make the process more efficient.

While PPM49 regulations are incorporated into Chrome River, Approvers are still required to closely check that travelers adhere to them as part of their approval process.



Starting a Pre-Approval

To begin a new Pre-Approval (this takes place of the paper travel request) you will first click on the “New” tab at the top right and choose Pre-Approval.

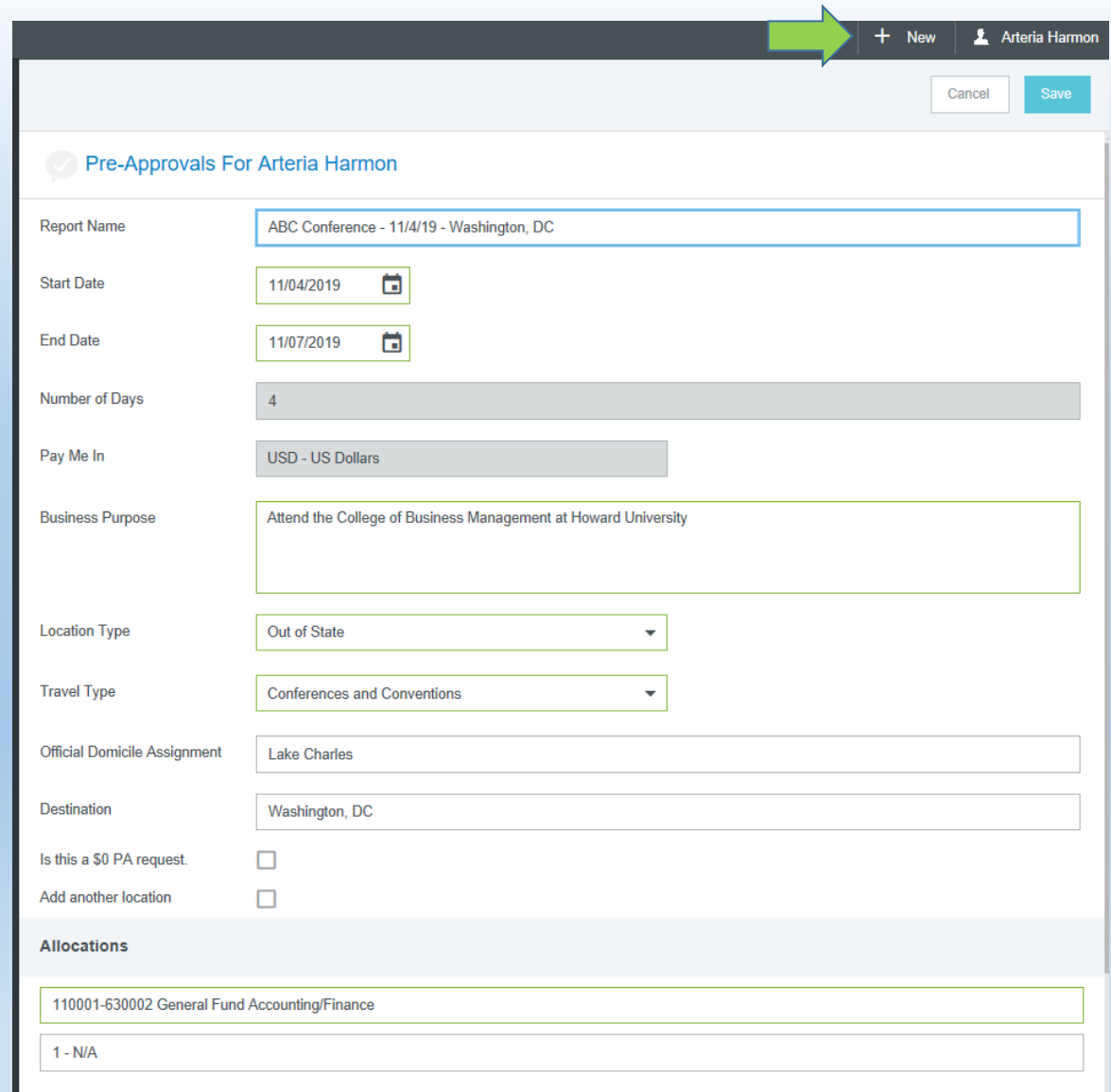
IMPORTANT: Use this format for the **Report Name:** “Name of event – Starting date – Location”.

Complete all fields accordingly.

Tips:

- Examples for use of Travel Type selections:
 - Administrative – off-campus meetings, training
 - Field Travel – between SOWELA campuses
 - Conferences & Conventions – sponsored events that require a registration fee
 - Blanket – recurring mileage for a specified period of time; i.e. travel between campuses on quarterly basis
- Official Domicile Assignment is your primary campus; Lake Charles, Jennings, or Oakdale
- In Allocations field, search for your Fund/Org combo by name or number. Recent selections will automatically appear.
- The field under Fund/Org is for Activity Code. If no Activity Code applies (ex: Student Activity Fee-SAF133 or LCTCS Conference-CONF20), select N/A. This is a required field.

Once you save the Pre-Approval you will be taken to another screen to choose all of the expense items related to your travel.



The screenshot shows a web application interface for creating a pre-approval. At the top right, there is a navigation bar with a '+ New' button and a user profile icon for 'Arteria Harmon'. A green arrow points to the '+ New' button. Below the navigation bar, there are 'Cancel' and 'Save' buttons. The main content area is titled 'Pre-Approvals For Arteria Harmon' and contains a form with the following fields:

- Report Name: ABC Conference - 11/4/19 - Washington, DC
- Start Date: 11/04/2019
- End Date: 11/07/2019
- Number of Days: 4
- Pay Me In: USD - US Dollars
- Business Purpose: Attend the College of Business Management at Howard University
- Location Type: Out of State
- Travel Type: Conferences and Conventions
- Official Domicile Assignment: Lake Charles
- Destination: Washington, DC
- Is this a \$0 PA request:
- Add another location:

Below the form, there is an 'Allocations' section with two rows:

- 110001-630002 General Fund Accounting/Finance
- 1 - N/A

Your Pre-Approval document is now ready to be built

The screenshot displays the Chrome River Pre-Approval system interface. At the top, the Chrome River logo is on the left, and a navigation bar on the right includes a '+ New' button and the user name 'Arteria Harmon'. Below the logo, a blue header bar shows a back arrow, 'Pre-Approvals For Arteria Harmon', and a '+' icon. The main content area is titled 'ABC Conference - 11/04/19 - Washington, DC.' and includes links for 'Comments' and 'Attachments'. A table with columns 'EXPENSE' and 'ESTIMATED' is shown, with a message 'Click "+" to add your first item'. On the right, a panel titled 'Add Pre-Approval Types' lists categories: AIR TRAVEL, GROUND TRANSPORTATION, HOTEL, MEALS, CONFERENCE / SEMINAR FEES, MISCELLANEOUS TRAVEL, and PARKING & TOLLS. At the bottom, a summary bar shows 'PA Report ID', 'Total Estimated Amount', and a green 'Submit' button.

EXPENSE	ESTIMATED
Click "+" to add your first item	

PA Report ID: 040000475000

Total Estimated Amount: 0.00

Submit

Pre-Approval Expense Entry – Helpful Tips

- Enter comments for individual expense items to provide additional information regarding your trip. Providing as much information as possible with your request reduces questions and returned items during the approval process.
- For fields titled “How will this expense be paid?”, select:
 - College Directly – for items paid with your assigned travel card or College’s CBA account
 - Traveler – for items paid with your personal funds. This will be for items that are reimbursed to you after the travel has occurred.
- Chrome River will **not allow** reimbursement when actual costs exceed the requested amount. When estimates are needed, round up (within reason) to accommodate for price increases or unplanned costs.

Summary of Pre-Approval Expense Types

- **Air Travel**
 - Air Travel – Estimate of airfare based on search of flights in SHORTS. Round up to accommodate for price increase at time of booking. ****Only Economy/Coach allowed per State travel policy (PPM49)**
 - Baggage Fee – Allowed one checked bag, receipt required
 - Airfare Baggage Tips – tips for driver to/from airport to handle luggage. See PPM49 for current maximum allowed.
- **Ground Transportation**
 - Car Rental – **Only compact or intermediate allowed** See PPM49 for current approved rates. Larger vehicles permitted if three or more authorized travelers are in the vehicle, must include reason for larger vehicle in Comments section.
****Use of Fuel Card required when renting. Contact Business Office to check out a Fuel Card prior to departure.**
 - Personal Vehicle Mileage – Max allowed is 99 miles round-trip. See PPM49 for current approved rates.
 - Other ground transportation options – include estimates for public transportation, shuttle/taxi services, or estimates for fuel card expense with rentals or state vehicle using applicable option.
- **Conference/Seminar Fees**
 - Registration fees; must attach support showing published rate
- **Miscellaneous Travel**
 - Use 'Miscellaneous – Other' option to include estimate for any unplanned expenses and tips for hotel valet.
- **Hotel**
 - Lodging – calculate room rate here
 - Estimated Amount: Actual room rate multiplied by number of nights. If not a Conference Rate, see PPM49 for current approved maximum rates for lodging.
 - Allowable Total: Calculates total room rate expense based on allowed tier per PPM49
 - Conference Rate: enter published conference rate. Must include documentation showing rate.
****If using conference rate, MUST select box for "This is conference lodging". If not selected and Estimated Amount exceeds Allowable Amount, you will receive an error when submitting for approval.**
 - Other (Taxes, Tips, Parking, etc.) – include estimate of state & local sales tax (if out of state), occupancy tax, resort fee (if applicable), parking, etc.
- **Meals**
 - Per Diem Wizard - **ONLY USE THIS OPTION.** Will automatically calculate allowable meals per appropriate PPM49 tier based on start and end dates and times. Once daily amounts calculated, can expand each day and exclude meals that are provided by hotel or conference (ex: lunch provided by conference)
 - Do not use any of the other meal options. These are built into the system for other entity types, but are not used by LCTCS employees.
- **Parking & Tolls**
 - Parking costs that are NOT included with hotel parking and any required tolls if no alternate route available.

+ New Arteria Harmon

Add Pre-Approval Types

AIR TRAVEL	GROUND TRANSPORTATION	HOTEL	MEALS	CONFERENCE / SEMINAR FEES	MISCELLANEOUS TRAVEL
AIR TRAVEL	BAGGAGE FEE	CHANGE TICKET FEE	AIRFARE BAGGAGE TIPS		

+ New Arteria Harmon

Add Pre-Approval Types

AIR TRAVEL	GROUND TRANSPORTATION	HOTEL	MEALS	CONFERENCE / SEMINAR FEES	MISCELLANEOUS TRAVEL
CAR RENTAL	CAR RENTAL FUEL	BUS / SUBWAY / RAIL	SHUTTLE / LIMO / TAXI	PERSONAL VEHICLE MILEAGE	STATE CAR

+ New Arteria Harmon

Add Pre-Approval Types

AIR TRAVEL	GROUND TRANSPORTATION	HOTEL	MEALS	CONFERENCE / SEMINAR FEES	MISCELLANEOUS TRAVEL
LODGING	OTHER (TAXES, TIPS, PARKING, ETC.)				

+ New Arteria Harmon

Add Pre-Approval Types

AIR TRAVEL	GROUND TRANSPORTATION	HOTEL	MEALS	CONFERENCE / SEMINAR FEES	MISCELLANEOUS TRAVEL
PER DIEM WIZARD	BUSINESS MEALS / SPECIAL MEALS	GROUP MEALS			

+ New Arteria Harmon

Cancel Save

Air Travel

Estimated Amount 500.00 USD

Description Optional Estimated airfare

How will this expense be paid? College Directly

Air Class Economy/Coach

Airline American

GL_ACCT 7752

CC Optional RA

+ New Arteria Harmon

Cancel Save

Baggage Fee

Estimated Amount 60.00 USD

Description Optional 1st checked bag baggage fee

Number of Bags 1

How will this expense be paid? Optional Traveler

GL_ACCT 7752

CC RA

Air Travel

Under Air Travel enter the estimated amount based on the research you have done in SHORTS.

1. Increase your estimated amount (within reason) in case cost goes up before request is approved.
2. Description (Optional)
3. How will this expense be paid? College Directly
4. Air Class: Economy/Coach
5. Airline: Airline you selected in SHORTS
6. Save

Baggage Fee

1. Enter estimated cost of your 1st checked bag. Use current rate for selected airline and double amount for roundtrip.
2. Description (Optional)
3. Number of bags: 1
4. How will this expense be paid? Traveler
5. Save


GROUND TRANSPORTATION - Car Rental and Car Rental Fuel

- 1. Estimated amount of rental. See PPM49 for allowed rates.
- 2. Description (Optional)
- 3. How will this expense be paid? College Directly
- 4. Car Agency: Select agency used. Enterprise is the only option for in-state; Hertz, National or Enterprise for out-of-state
- 5. Save

- 1. Estimated amount of fuel that will be charged to fuel card
- 2. Description (Optional)
- 3. How will this expense be paid? College Directly
- 4. Is this a State Car?: Do NOT check that this is a state car if renting
- 5. Save

+ New Arteria Harmon

Cancel Save

 **Car Rental**

Estimated Amount: 150.00 USD

Description (Optional): Estimated 3 day car rental fee

How will this expense be paid?: College Directly


Car Agency: Enterprise

GL_ACCT: 7752

CC: RA

+ New Arteria Harmon

Cancel Save

 **Car Rental Fuel**

Estimated Amount: 75.00 USD

Description (Optional): Estimated car fuel

How will this expense be paid?: College Directly

Is this a State Car?:

GL_ACCT: 7752

CC: RA


GROUND TRANSPORTATION - State Car and Rental Fuel

1. Estimated Amount: Leave at \$0.00, no cost related
2. Description (Optional)
3. How will this expense be paid? College Directly
4. Save

1. Estimated Amount: estimated cost of fuel
2. Description (Optional)
3. How will this expense be paid? College Directly
4. Is this a State Car?: Yes, check that it is a state car
5. Save

+ New Arteria Harmon

Cancel Save

 State Car

Estimated Amount: 0.00 USD

Description (Optional): Friday only


How will this expense be paid?: College Directly

GL_ACCT: 7752

CC: RA

+ New Arteria Harmon

Cancel Save

 Car Rental Fuel

Estimated Amount: 50.00 USD

Description (Optional): Fuel for state car

How will this expense be paid?: College Directly

Is this a State Car?:

GL_ACCT: 7752

CC: RA

GROUND TRANSPORTATION _


Shuttle/Taxi/Lyft/Uber and Personal Vehicle Mileage

1. Enter estimated amount
2. Description (Optional)
3. How will this expense be paid? Traveler
4. Save

1. Enter estimated amount. Multiply miles traveled roundtrip (up to 99 miles) by the current reimbursement rate per PPM49. Recommend use of Google Maps to determine miles traveled.
2. Description (Optional)
3. How will this expense be paid? Traveler
4. Estimated number of miles: Use estimated distance from Google Maps (recommended) for roundtrip. Maximum allowed is 99 miles.
5. Save

+ New Arteria Harmon

Cancel Save

 Shuttle / Limo / Taxi

Estimated Amount: 50.00 USD

Description (Optional): Transportation to and from airport


How will this expense be paid?: Traveler

GL_ACCT: 7752

CC: RA

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Cancel Save

 Personal Vehicle Mileage

Estimated Amount: 57.42 USD

Description (Optional): Using personal vehicle

How will this expense be paid?: Traveler

Estimated Number of Miles traveled: 99

GL_ACCT: 7752

CC: RA

HOTEL – Lodging and Other (Taxes, Tips, Parking, etc.)

1. Enter Estimated amount of hotel stay using actual room rate
2. Allowable Total: Click on [Calculate](#) to get the allowable total per PPM49
 - Enter start and end date of travel
 - Add Location (The city you are lodging in)
 - Rooms: 1
 - Save
3. Description (Optional)
4. How will this expense be paid? College Directly
5. Conference rate: Enter conference group rate. If lodging is not a group rate leave at zero
6. This is conference lodging: Check only if lodging is priced at a conference rate
7. Save

1. Enter combined estimate for hotel taxes & parking. Tips for hotel valet will be entered under the Miscellaneous Travel screen.
2. Description (Optional)
3. How will this expense be paid? College Directly
4. Save

+ New Arteria Harmon

Cancel Save

Lodging

Estimated Amount: 850.00 USD

Allowable Total: 675.00 USD [Calculate](#)

Description (Optional): Estimated hotel expenses

How will this expense be paid?: College Directly

Conference Rate: 189

This is conference lodging:

GL_ACCT: 7752

CC (Optional): RA

+ New Arteria Harmon

Cancel Save

Other (Taxes, Tips, Parking, etc.)

Estimated Amount: 100.00 USD

Description (Optional): Estimated taxes and parking

How will this expense be paid?: College Directly



GL_ACCT: 7752

CC: RA

MEALS

1. Click on [Per Diem Wizard](#)
2. Enter start date and departure time (Remember it is military time)
3. Enter end date and arrival time (Remember it is military time)
4. Days (Will automatically calculate)
5. Description (Optional)
6. Location (Hosting city)
7. Click [Add Entries](#)

****Once you add entries you will see the date, location, and amount of your eligible meals per PPM49. If you know for sure what meals will be provided you can make changes at this time by clicking on the date or the location on the right-hand screen. Meals with a selected checkbox are excluded from reimbursement. If you are unsure what meals will be provided, you can leave all unchecked and make adjustments during the reimbursement process.****

 **CHROME RIVER** + New  Arteria Harmon

Start Date

End Date

Days

Description Optional

Location

GL_ACCT

CC


DATE	LOCATION	AMOUNT
× Mon, 11/04/2019	Washington, District of Columbia (DC), United States	57.00 USD >
× Tue, 11/05/2019	Washington, District of Columbia (DC), United States	36.00 USD >
× Wed, 11/06/2019	Washington, District of Columbia (DC), United States	36.00 USD v
Deductible (applicable for meals not to be reimbursed)		
<input checked="" type="checkbox"/> Breakfast	<input type="checkbox"/> Dinner	
<input checked="" type="checkbox"/> Lunch	<input type="checkbox"/> Additional Deduction	
× Thu, 11/07/2019	Washington, District of Columbia (DC), United States	21.00 USD >



CONFERENCE/SEMINAR FEES

1. Enter cost of registration fee. Enter full cost in case Early Bird deadline missed before request approved.
2. Description (Optional)
3. How will this expense be paid? College Directly
4. Save

+ New Arteria Harmon

Cancel Save

 **Conference / Seminar Fees**


Estimated Amount	450.00  USD
Description <small>Optional</small>	Estimated conference fee (\$375.00 early bird special if paid before 10/23/19)
How will this expense be paid?	College Directly 
GL_ACCT	7752
CC	RA


MISCELLANEOUS-OTHER

1. Estimated amount for unplanned expenses and tips for hotel valet. See PPM49 for current maximum allowed for valet tips.
2. Description: Unknown Expenses and Tips
3. How will this expense be paid?: Traveler
4. Save

+ New Arteria Harmon

Cancel Save

 **Miscellaneous - Other**

Estimated Amount: 50.00  USD

Description: Estimated unknown expenses and tips

How will this expense be paid?: Traveler ▼

GL_ACCT: 7752

CC: RA

Submitting Pre-Approvals

- Once all of your expenses are entered, click Submit (green button on the bottom). This brings you to a certification page.
- Before you submit for approval, upload all required attachments (see next slide for more detail). Scroll down to bottom to see Upload Attachments button.
- Enter any comments to assist in approval process; i.e. “No transportation expense, carpooling with John Doe”
- Submit once complete

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.

Shuttle / Limo / Taxi	75.00	0.00
Total	2,517.42	0.00

Account Summary

		AMOUNT (USD)
110001-630002	General Fund Accounting/Finance 1 - N/A	2,517.42
Total		2,517.42

Comments (0)

Attachments (0)

Drag image here to upload

ABC Conference - 11/04/19 - Washington, DC.

EXPENSE	ESTIMATED
Air Travel	500.00 USD
Baggage Fee	60.00 USD
Car Rental	150.00 USD
Car Rental Fuel	75.00 USD
Shuttle / Limo / Taxi	75.00 USD
Personal Vehicle Mileage	57.42 USD
Lodging	850.00 USD
Other (Taxes, Tips, Parking, etc.)	100.00 USD
Meals - Per Diem	57.00 USD
Meals - Per Diem	36.00 USD
Meals - Per Diem	36.00 USD
Meals - Per Diem	21.00 USD
Conference / Seminar Exp	450.00

PA Report ID: QA0000425933

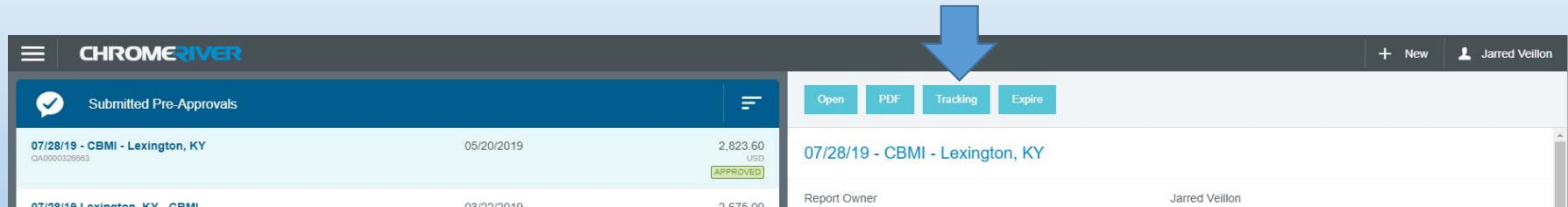
Total Estimated Amount: 2,517.42 USD

Required Attachments

- If traveling for a conference:
 - Conference information published by the sponsor. MUST include:
 - Dates and location of conference
 - Registration fee amounts
 - Room rates for hosting hotel or other nearby hotels with a negotiated group rate
 - Agenda for each day (can be tentative) showing start and end times
 - Airfare quotes from SHORTS if flying
- If traveling for a meeting/training:
 - Email or other documentation showing meeting/training information. MUST include:
 - Dates and location of event
 - Agenda or scheduled start and end time of event (can be tentative)
 - If event requires overnight stay:
 - Documentation from organizer showing negotiated group rate for hotel, or
 - If no group rate, hotel rate must be within allowed tier per PPM49
 - Airfare quotes from SHORTS if flying

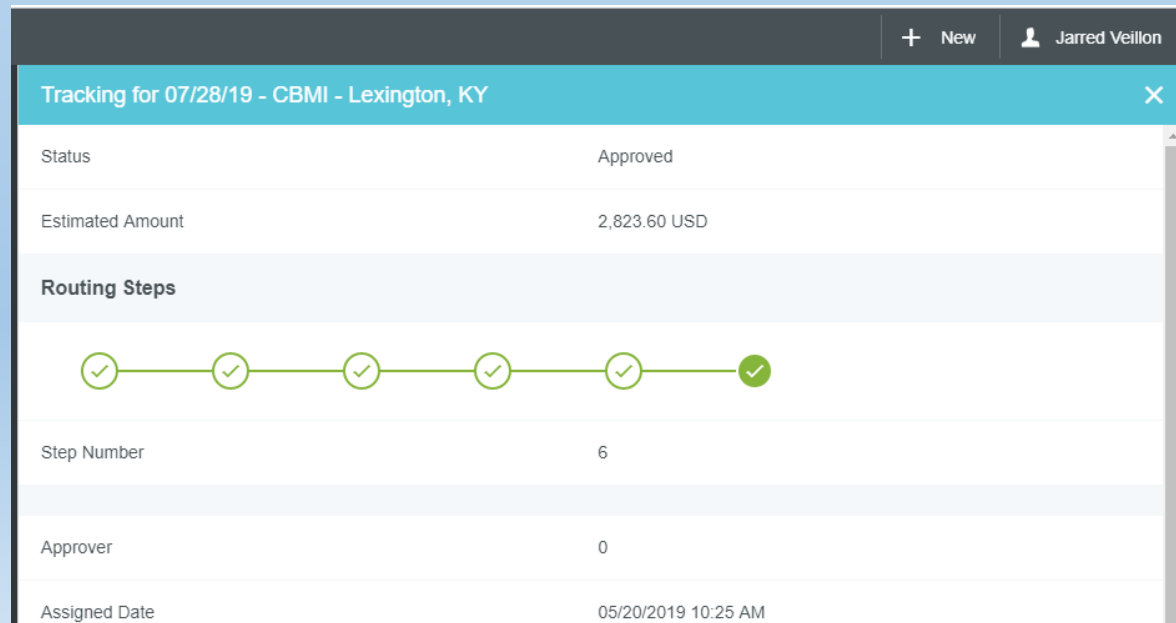
****Attachments must be in PDF format. Please avoid duplicates and use summary agendas where possible.**

Tracking Pre-Approval Status



The screenshot shows the Chrome River interface. On the left, there is a sidebar with a 'Submitted Pre-Approvals' section. The main area displays a list of pre-approvals. One entry is highlighted: '07/28/19 - CBMI - Lexington, KY' with a date of '05/20/2019' and an amount of '2,823.60 USD'. A blue arrow points to the 'Tracking' button in the top right corner of the main area.

- You can monitor the status of your requests!
 - From the main menu or dashboard, select Recently Submitted Pre-Approvals
 - Select the desired Pre-Approval from the left screen, then the Tracking button on the right
 - Electronic approvals follow the same process as our paper forms. Click each circle to see the status of each step and who is currently reviewing your request
- You will receive an automated email from Chrome River when your request has been fully approved.
 - **AFTER the approval email is received, you may proceed making travel arrangements** (registering for conference, reserving hotel room, etc.), if assigned a travel card. For those without a travel card, the Business Office will contact you and begin making your travel arrangements.
 - ****IT IS VERY IMPORTANT THAT YOU DO NOT MAKE ANY ARRANGEMENTS BEFORE YOUR TRAVEL IS APPROVED. YOU WILL BE RESPONSIBLE FOR ANY COSTS INCURRED FOR TRAVEL THAT IS NOT APPROVED!**



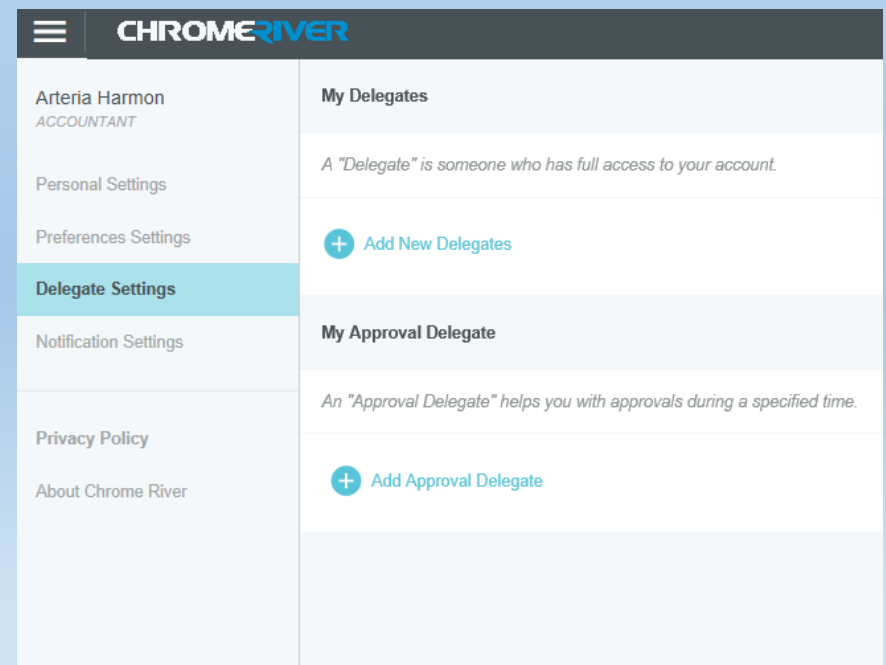
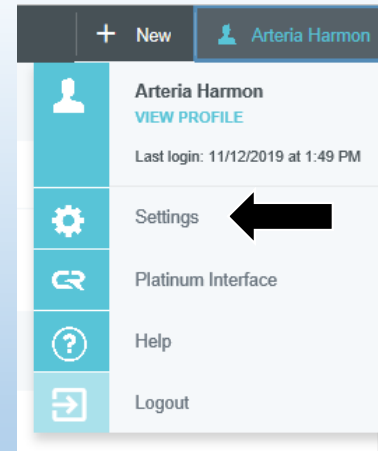
The screenshot shows the tracking details for a pre-approval request. The title is 'Tracking for 07/28/19 - CBMI - Lexington, KY'. The status is 'Approved'. The estimated amount is '2,823.60 USD'. The routing steps are shown as a horizontal line with six green circles, each containing a checkmark, indicating that all steps are completed. The step number is '6', the approver is '0', and the assigned date is '05/20/2019 10:25 AM'.

Delegates

Under Settings, you can choose to set up a Delegate to have full access to your Chrome River account or just as an Approval Delegate.

To set up the Delegate, click on the “Add New Delegates” link and type in the name of the person you would like as your Delegate. A person having full access to your account as a Delegate remains in this function until you remove them. The Delegate would prepare your Pre-Approval and you would have to review and approve before it continues along the regular approval levels.

An Approval Delegate allows you to establish an approver in your absence during a specified period of time. This feature can be used if you are out of the office for an extended period of time.



Notes

- Chrome River available on phone or tablet via website to allow for access from anywhere
- Format of the Report Name very important (ex: LCTCS Conf. – 9/26/19 – New Orleans, LA)
- Make sure to overestimate on Pre-Approval and even add a little money into the miscellaneous expenses. An Expense Report cannot be higher than the total costs on the Pre-Approval.
- Helpful Resources:
 - Training videos on the use of Chrome River are available in LoLA! From your LoLA homescreen, click the Training link at the top and select Chrome River or follow this link: <https://my.lctcs.edu/web/lola/chromeriver>. LCTCS training videos on various topics for both Pre-Approvals and Expense Reports are listed.
 - Visit the Business Office page on the SOWELA website for reference guides, policies, and forms related to travel: <https://www.sowela.edu/about/faculty-and-staff-resources/business-office/>
- Contact the Business Office for any travel questions

