

Roles and Responsibilities in Chrome River

Users in Chrome River have defined Roles and Responsibilities. The Roles are assigned in the system and drive how information is shared and routed for approval and payment.

Roles in Chrome River:

1. Expense Owner
2. Delegate
3. Supervisor
4. Primary Approver
5. International Approver
6. OSP Approver
7. Expense Approver

Expense Owner

Roles and Responsibilities

- Requests permission to incur expenses through pre-authorization from Supervisor
- Certifies that all expenses support the WM mission and are necessary and economical.
- Provides required documentation for each expense.
- Completes Pre-Approval and Expense Report in Chrome River or sets up a delegate.
- Approves delegate's preparation of expense reports.
- If an Expense Owner completes their own expense report, the Expense Owner must assign the correct receipts to each expense.

May chose one or multiple delegates within the system.

Delegate

Roles and Responsibilities

- Completes **Pre-Approval** and **Expense Report** on behalf of the expense owner based on information and receipts provided by the expense owner.
- Enters Pre-Approval required line items to include estimates of expenses
- Uploads or scans receipts when received from Expense Owner
- Assigns the correct receipts to each expense.
- Submits **Pre-Approval** or **Expense Report** to the Expense Owner.

A person can be a Delegate to multiple expense owners in the system.

Supervisor

Roles and Responsibilities

- Ensures request for travel is in support of the WM mission
- Approves the **Pre-Approval** request in Chrome River.
- May Approve the **Expense Report** request, if the Budget Approver is the Traveler.
- The Supervisor Role is the expense owner's timesheet approver listed in HR Banner.

Roles may not be delegated in Chrome River.

Primary Approver

Roles and Responsibilities

- Ensures that funds are available for the request.
- Examines expenditures to make sure they are in compliance with WM policy.
- Ensures required documentation is attached.
- Approves the **Pre-Approval** and **Expense Report** request
- The Primary Approver Role is the primary person designated on the list of authorized index approvers.
- Business Officers in the departments have identified the staff under this role.

Role may be delegated in Chrome River

International Approver

Roles and Responsibilities

- This approval is required for all trips with a foreign country destination.
- Approves the **Pre-Approval** request.
- Approves **Lodging Exception** when Hotel Room rate exceeds by 150% but is less than 200%.
- Approves **Business Meal Exception** when meal rate per person exceeds by 150% but is less than 200%.
- Role is usually assigned to Dean, VP, and/or Director.

Role may be delegated in Chrome River

OSP Approver

Roles and Responsibilities

- This approval is required for all trips funded by a Grant.
- Approves the **Pre-Approval** request in Chrome River.
- This is the only time the OSP Approver will approve any information in Chrome River.
- Role is designated to all Grant Administrators.

Role may be delegated in Chrome River

Expense Approver

Roles and Responsibilities

- Ensures expenses are reasonable and necessary.
- Ensures the **Expense Report** is in compliance with all WM established regulations and procedures.
- Verifies that all transactions are valid business expenses & that travel occurred.
- Role is assigned to team members of the Travel and AP departments.

Role may not be delegated in Chrome River.