**Chrome River FAQs**

**FAQs**

**Pre-Approval**

1. **If the dates of travel change from the dates approved on the Pre-Approval, do I need to complete a new Pre-Approval?**

Once a Pre-approval has been fully approved, it cannot be updated. If the only changes require changes to the date, input a comment on the Pre-Approval indicating the correct dates and provide an explanation for the change. ON the expense report side, you must also include a comment to indicate the reason behind the differences in dates with the Pre-Approval and Expense. Ideally, they must match. If there is a change to an allocation (index), you must complete a new Pre-Approval as the report routes to the budget approver over the index.

1. **What should I include on my Pre-Approval?**

The intent of the Pre-Approval is to seek authorization for the trip; therefore an estimated amount of all trip expenses, including expenses charged to the Small Purchase Charge Card (SPCC) and the Air Travel Card (ATC) is required.

1. **Is the policy built into the Pre-Approval?**

The only compliance rule built into the Pre-Approval is the Lodging in excess of 200%. The compliance rules remind you to obtain the CFO approval. Airbnb and other third party compliance rules have been recently included on the Pre-Approval.

1. **My Pre-Approval says “Pending Approval”, who is the report pending with?**

Under “Pre-Approval - Submitted Last 90 Days” click on the Pre-Approval that you are questioning (it will turn light blue). Click on the “Tracking” tab, a Tracking data box will appear. The system will now show you who your pre-approval is currently pending with. The Travel Office does not track Pre-Approvals. Once the Pre-Approval shows “Approved” this indicates it has been fully approved and will be included in the Pre-Approval dropdown box when the expense report is created.

1. **Now that my airfare has been approved on my Pre-Approval, how do I proceed?**

Now that your travel has been approved, you can book your arrangements through Covington WM Business Travel full service agent. They require a Pre-Approval in order to book travel through the University contract.

1. **How long does my Pre-Approval stay on my dashboard?**

Fully approved Pre-Approvals will be visible on your home dashboard for 90 days. After 90 days, it is still in the system, and will be available to attach to an expense report. All Pre-Approvals will expire within 180 days. Once expired, you will need to create a new Pre-Approval in the system.

**Expense Report**

1. **Why does the mileage rate default to the higher rate?**

All mileage reimbursement requests will be reimbursed at the IRS allowable rate for employees when traveling 200 or less miles a day. Students and Non-WM Affiliates do not adhere to the same rules. Departments may be more restrictive. Chrome River allows the rate to be edited to accommodate budget restrictions, grant parameters, etc.

1. **Why doesn't Chrome River deduct for incidentals before calculating the 75% Travel Day?**

The travel day reduction for meal per diem will change to 75%. Per policy this calculation does not back out incidentals from the calculations. Chrome River is configured to reduce the travel day to 75% when selected without affecting the incidental amount.

1. **Why can't I look up my per diem rate by zip code?**

Per diem zip code data is not loaded into Chrome River.  Chrome River receives this information from the federal government, and unfortunately, zip codes are not included in the feed. You may use the following site to research a location by zip code - <http://zip-codes.com>.

1. **How do I know the status of an Expense Report?**

Under “Expenses - Submitted Last 90 Days” you will see the status of each voucher. The different status are: Pending Approval, Approved, Returned, Exported, Paid, and Awaiting Receipts.

1. **My Expense Report says “Pending Approval” who is it Pending Approval with?**

Under “Expenses - Submitted Last 90 Days” click on the Expense Report that you are questioning (it will turn blue). Click on the “Tracking” tab, a Tracking data box will appear, click “Currently Assigned”. The system will now show you who your expense report is currently pending with. If the tracking shows Pending Approval with APReview, this indicates that it is in the queue of the Travel Office and is awaiting its turn for audit and approval.

1. **How can I submit my receipts with my mobile?**

Use your mobile phone to take a photo of the receipt, then attach it to an email and send it to receipt@chromefile.com from the phone. You should use your WM email address when sending emails to Chrome River.

1. **Should we submit non-travel Personal Reimbursements through Chrome River?**

Only travel-related expenses and business meals are submitted in Chrome River. All other non-travel expenses will continue submitting non-travel reimbursements through the Accounts Payable voucher process on a Vendor Payment Request Form.

1. **If the status of my Expense Report reads “Awaiting Receipts,” what should I do?**

You will have to upload an image to start the expense routing.  Highlight the report and select “Upload Image.”  The status reads “Awaiting Receipts” because the “Receipts Attached” box was checked on one of your expense items.  To avoid this in the future, uncheck the “Receipts Attached” box if your expense does not require a receipt and you do not plan to attach one because it is not required by policy.

1. **How do I delete an Expense Report?**

There are two options, depending on a report’s status. First, if an Expense Report has been submitted, but not fully approved (i.e. the entire report is Pending Approval), you can click on the Expense Report in your “Submitted Last 90 Days”. The report should be blue – then click “Recall”. A confirmation box will appear, click “Yes”. This action will move the report back to your Draft Expense Reports. Under Draft Expense Reports, click on the report, the report should be blue and the Delete function will be available. A confirmation box will appear, click “Yes”.

Second, if an expense report has been returned, you will see the report in your “Returned Expense Reports” with a “Returned” status. You can only delete an Expense Report once you have deleted all expense items within the report. To do this, open the Expense Report, and delete the expense items highlighted in yellow. The yellow indicates that these are the expense items that were returned to you. You will have to delete each expense one at a time. Once all returned expenses have been deleted, you will have the ability to delete the Expense Report.

1. **What does the Status "Exported" mean?**

Exported means that the reimbursement has been exported to Banner.  Once the Expense Report has been exported, the reimbursement payment by check or direct deposit should process the next business day.

1. **My Approver says she has approved my Expense Report, but the status still reads “Pending Approval.”  What should I do?**

Ask your Approver if she approved via email or within Chrome River.  If she approved via email, then please ensure that she clicked “Accept” and then “Send” to complete the final approval.  If your Approver approved within Chrome River, please ensure that she clicked on the “Submit” button to complete the final approval.

1. **When I upload a receipt, why does Chrome River sometimes cut off a portion of the document?**

During the conversion process from a PDF file to a SWF file, the system first creates a temporary JPG image that trims some of the receipt image for quick display. Once the final conversion has taken place and the PDF is now a SWF file, the full image is available.

1. **I need to add an expense to an Expense Report that has been returned to me, what should I do?**

You cannot add an expense to an Expense Report that has already been submitted. You can either RECALL the expense report back to the drafts and then add an expense. -Or- Create a new Expense Report (Addendum) with that expense item and use the Notes section to explain how the new Expense Report relates to the former report. The addendum must include, a completed new expense report with the exact same travel dates as the original submitted, Include only the new or missing expenses from the original, include “Addendum” in the header, and the Pre-Approval must be attached to the addendum if one is required.

**Special Processes**

1. **What do I need to send to Accounts Receivable with my check when paying back a Travel Advance?**

Any portion of a Travel Advance not spent on business travel must be paid back.  Please attach a PDF version of the accompanying Chrome River Expense Report for the Advance and send to Accounts Receivables or take to the Cashier’s with your check. Keep your cash advance payment receipt, as you will need to upload to your “Chrome River Cash Advance Return” to clear out your balance from your CR dashboard.

1. **What is the best method to identify a Non-WM Affiliate (or Student) Pre-Approval and Expense Report?**

It is recommended that you include I the Non-WM Affiliate/Student name and 93# in the Report Header.

1. **How do I request a Non-WM affiliate that already has a 93# to be added to Chrome River vendor list?**

If the 93# exists already, send an email to [apvendors@wm.edu](mailto:apvendors@wm.edu) and request the vendor type update. Once the FTMVEND form in Banner is updated, the vendor will be in Chrome River the next day.

**Tech Tips**

1. **Why isn’t my e-mail accepting my approval?**

Chrome River is loaded with everyone’s wm.edu email address. You will not be able to approve/deny requests via email unless your email matches the email in Chrome River. Please note, users can still log into the Chrome River system to approve expense reports without an issue.

1. **What happens if Microsoft Outlook launches with approval emails?**

If Microsoft Outlook launches when you click accept/deny, you will need to change your computer’s default mail client. This is not a change within Chrome River. You can change your computer’s mail client in your Control Panel, or you can work with IT staff to align your computer with the mail client.

1. **Do Adjunct professors have access to Chrome River?**

Adjuncts professors rarely travel for university business and are not set up in Chrome River with an employee profile. If you have an adjunct professor traveling for business, you will need to follow the Vendor Create Process to have them submitted as a Non-WM Affiliate. An employee of the university will need to submit Pre-Approvals and Expense Reports on their behalf.

**Delegate**

1. **Why am I receiving delegate email notifications when I was not the specific delegate that created the Pre-Approval or Expense Report?**

If you are set up as a delegate, then you will receive email notifications for all users in which you are set up as their delegate.  Delegates cannot opt out of receiving the email notifications.  The only option is to opt out of ALL notifications, but then you will not receive notifications on your own Expense Reports or email approvals. If you know that you are not responsible for the expense report, you can delete the email. The administrator who is can go into the report and make the necessary corrections.

1. **Why don’t Pre-Approval requests go to my Vacation Approval Delegate when activated?**

Vacation Approval Delegation does not extend to Pre-Approval.

**Changes After APReview**

1. **How do I modify the dates on the header after submitting to AP?**

You are able to go into the Expense Report and click on Edit to modify the travel dates on an expense report.

1. **Why can I not add additional expenses once it has been reviewed?**

Once an expense report has been submitted to AP for review, additional expenses cannot be added once returned to the expense owner. You will need to RECALL the report back to the drafts to add additional expenses, or create an addendum for the new expenses. ***See Answer from Expense Report #13 for addendums.***

1. **What can I change after AP has reviewed the expense report?**

The expense owner should be able to change anything other than the fields that would affect the amount. The AP reviewer has the ability to adjust certain items that fall outside of compliance.