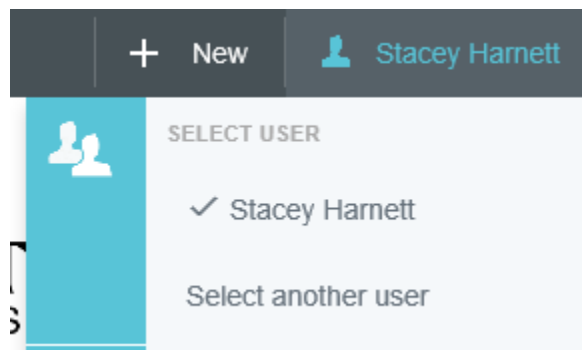


How to Create a New Pre-Approval Report

Pre-approvals are now used in lieu of the ARRTV form. Pre-approvals allow you to obtain pre-authorization from your BUM and travel officer for an expense before it is incurred or a reservation is made.

1. Login to Chrome River. If you are a Proxy, click on your name in the upper right-hand corner and then click on the appropriate person from your list.



2. Click on the **+NEW** button in the upper right corner and select **NEW PRE-APPROVAL REPORT** from the drop-down menu.



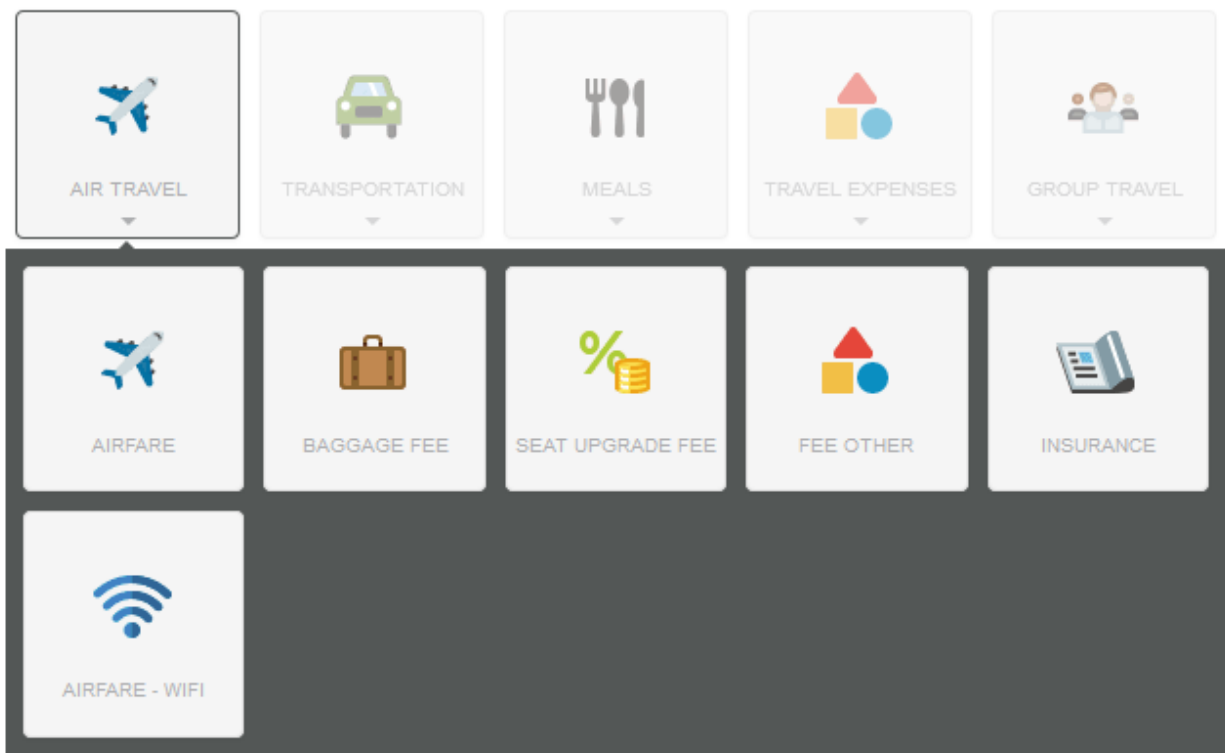
3. The types of fields and drop-downs on the Pre-Approval Header Entry screen will vary based on the Report Type. Once you have chosen your report type, you will not be able to change it. In addition to the report type, the following fields will always be required:
 - **Report Name:** Name of the trip/conference and the start date of travel.
 - **Start/End Dates:** Dates of travel
 - **Number of Days:** Automatically determined by Start and End dates.
 - **Pay Me In:** Defaults to US dollars.
 - **Business Purpose:** The business-related reason for the expenditure. Please include the location in this field.

- **Events/Ethical Questions:** Choose “yes” or “no” and complete and submit Request for Approval Form with Institutional Diversity and Equity as needed.
- **Organization/Fund/Program:** You may search the list by typing in the first four digits of the number or by typing the name of the Org. Once you select your org the fields for fund and program will appear. You may also divide the request among multiple allocations by clicking **ADD ALLOCATION**. **If you are unsure of your allocations, 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.**

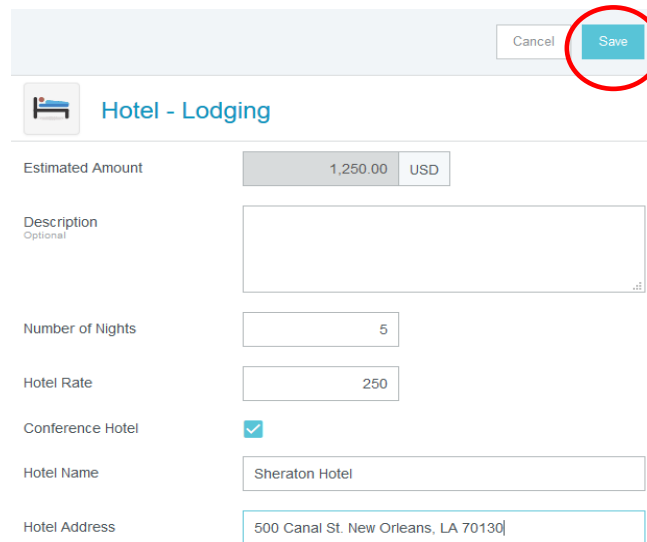
Once you have filled out the basic header information, click **Save**, and then you will be able to add potential expenses.

4. Click on an expense tile to see the sub-categories listed and choose the one you would like to add.

Add Pre-Approval Types



5. Clicking on an expense-type tile takes you to the Add Expense screen for that type. Enter the required information and click **SAVE**.



The screenshot shows the 'Hotel - Lodging' form with the following fields and values:

Field	Value
Estimated Amount	1,250.00 USD
Description (Optional)	
Number of Nights	5
Hotel Rate	250
Conference Hotel	<input checked="" type="checkbox"/>
Hotel Name	Sheraton Hotel
Hotel Address	500 Canal St. New Orleans, LA 70130

TIPS ON ADDING EXPENSES

- Under Hotel, use the Hotel-Other tile to add taxes/fees associated with lodging
 - 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
 - If you are unable to input an amount in the “Estimated Amount” box, that means the system will calculate this for you. Ex: for hotel-lodging, enter the number or nights and hotel rate and the amount will populate
 - If you are submitting a report with no expenses, click on the Travel Expenses tile then Other Travel Expenses. Input a \$1 and note in the description box that there are no expenses for the trip
 - To reduce the total approved amount for your trip, click on the Travel Expenses tile then Other Travel Expenses and input a (-) and the dollar amount you would like deducted from your total and click SAVE
6. You can attach images such as an airfare estimate to a pre-approval while you are creating it or at any stage after it has been created. To attach images to your pre-approval request, click anywhere in the header of the report to bring up the header preview. Scroll down and you will see a spot to upload attachments.

Attachments (0)



Drag image here to upload

Upload Attachments

- When you are ready to submit your request, click on the green **SUBMIT** button at the bottom of the entry screen. If you are not ready to submit, your pre-approval form will automatically save to your **Draft Pre-Approvals**.
- You may receive a compliance warning after submitting your report. This indicates that additional information is required before the report can be submitted. Respond by either modifying the data or replying to the warning.
- Your pre-approval report will first go to the traveler for approval if submitted by a Proxy. It will then automatically be sent to the BUM for review and approval. It will then be sent to the travel officer for final review and approval. The Proxy that submitted the report and the traveler will receive an email notification once your report has been fully approved. You can also track your request by selecting the User and:
 - Clicking on **SUBMITTED LAST 90 DAYS** in the pre-approval section of the dashboard or if you are anywhere else in the interface,
or
 - Click on the **MENU** (the 3 horizontal lines stacked on top of each other in the left-hand corner) and then click on **RECENTLY SUBMITTED** in the **Pre-Approval** section of the drop-down menu.

Find the pre-approval in the list and click on it to display the preview. Then click on **TRACKING** to see who the report is assigned to. Chrome River will send a reminder approval email to anyone who has a report in their queue for 8 days.

Event Name	Date	Amount (USD)	Status
Asian American Students Conference 4/24/18 QA0000438527	10/03/2018	3,378.75	PENDING
Ellucian Conference 9/15/18 QA0000474654	09/07/2018	2,381.40	PENDING
Chang - Arts Center QA0000405638	08/13/2018	500.01	

Submitted Pre-Approvals

Open PDF Tracking Recall

Ellucian Conference 9/15/18

Scholarly Purposes #001
Complete the Request for Approval of Attendance Form and submit to: the Office of Institutional Diversity and Equity.

Response
OK