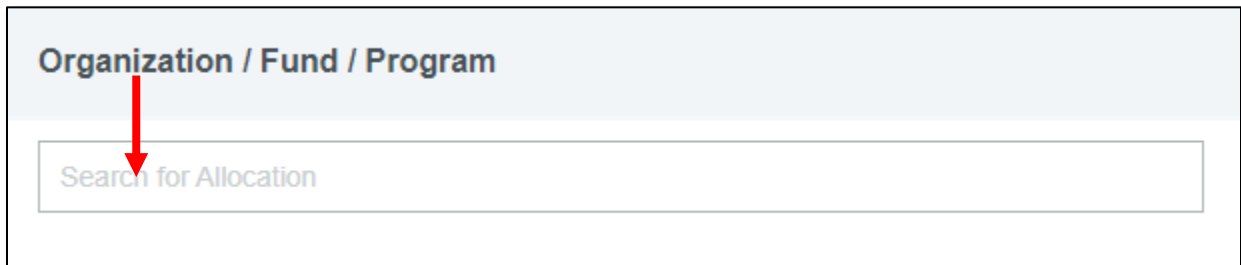


How to Create a Pre-Approval Report for Reception & Entertainment

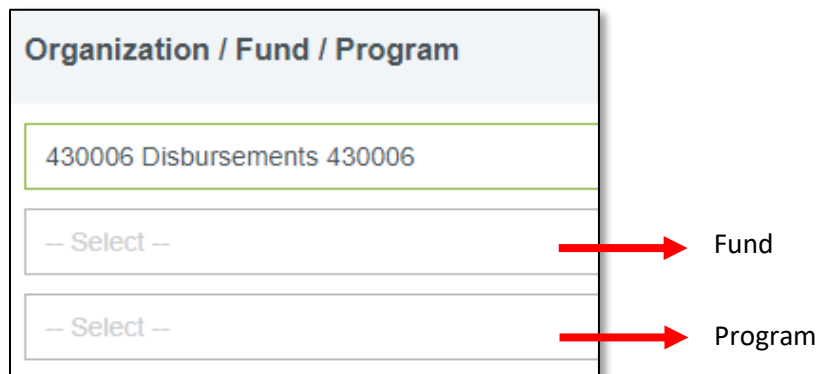
This report should be done under your department's profile or "SU Student" user for a student event. Please refer to the Reception & Entertainment Procedure for guidelines regarding the expenditure of University funds for the purchase of food/refreshments on and/or off campus. If using a vendor other than Chartwells, you must upload refusal documentation from Chartwells (does not include AC Campus). The pre-approval must be completed and approved BEFORE the event takes place.

- 1) Once logged into Chrome River, click on the **+Create** button in the upper right-hand corner of the Pre-Approval ribbon.
- 2) Complete the required fields of the report header and ensure the following:
 - Purpose of the function, meeting, event, etc. is clear.
 - Group composition is specified ex: students, University employees, candidates, etc.
 - Include anticipated number of each group.
 - Report Type = Employee
 - Trip Type = 731087 Official Reception & Entertainment.
- 3) After completing the required fields, input your org name or number and select it from the drop-down.



The screenshot shows a light blue header with the text "Organization / Fund / Program". Below the header is a white search box with the placeholder text "Search for Allocation". A red arrow points from the search box up to the header text.

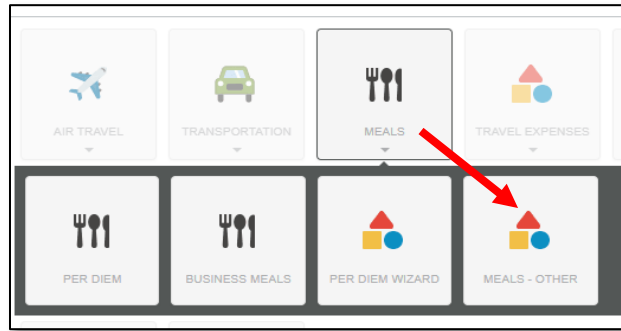
- 4) Once the org has been selected, two additional fields will appear. In the second box, input the fund number and select the fund from the drop-down. In the third box, input the program number and select it from the drop-down.



The screenshot shows the "Organization / Fund / Program" header section. The first field contains the text "430006 Disbursements 430006". Below this are two drop-down menus, both showing "-- Select --". A red arrow points from the first drop-down menu to the label "Fund", and another red arrow points from the second drop-down menu to the label "Program".

5) Click Save in the upper right-hand corner OR if the cost of this request needs to be split, click on **Add Another Allocation** to input another org/fund/program and then click Save. **TIP** – if you added another allocation, leave the percentage at 50/50. Once you have added your total estimated amount you can go back and input the exact dollar amount for each allocation.

6) Click on the Meals tile and select Meals – Other.



7) Input the dollar amount in the Estimated Amount field, include a description of what the amount will cover, and click Save.

8) Click on your report name in the upper left-hand side and that will bring up your report header on the right-side. Scroll all the way down on your report header to attach backup documentation such as a flyer for an event, agenda for a meeting, quote for food order, etc. You may also post any comments if needed.

9) Click the green Submit button if you are ready to submit, OR if you added an another allocation and need to split the cost, click Edit, scroll down to the bottom of the report header and adjust the dollar amounts as needed for each allocation (do not adjust the percentages as they will update after you input the dollar amounts). Then click Submit.

 A screenshot of an allocation table. At the top, it says "Organization / Fund / Program". There are two buttons: "Split Equally" and "Clear Splits". The table has three columns: a description of the allocation, a percentage, and a dollar amount. There are two rows of allocations. The first row is for "430006 Disbursements 430006" with a percentage of "20.00 %" and an amount of "100.00". The second row is for "430025 Payroll 430025" with a percentage of "80.00 %" and an amount of "400.00". Below the table, it shows a total of "100.00 %" and "500.00".

Organization / Fund / Program	Percentage	Amount
430006 Disbursements 430006	20.00 %	100.00
430025 Payroll 430025	80.00 %	400.00
Total	100.00 %	500.00

10) Once the pre-approval report has been approved, email pcard@stockton.edu with the last 4 digits of the pcard and the card will be modified to allow for the charge to be processed.