

Approving a Pre-Approval as a Financial Manager

How do I know if I have a Pre-Approval Pending Review?

If a document is pending review for approval, then the Approvals ribbon appears on the Chrome River home screen. To see the list of pending approval documents, click the **Pre-Approvals** link.

The screenshot shows the Chrome River dashboard with the following sections:

- eWallet** (blue header):
 - Unused Items: 0 Credit Card Items, 1 Receipts. [VIEW ALL 1 UNUSED ITEMS](#)
- Approvals** (orange header, highlighted with a green border):
 - Approvals Needed: 0 Expense Reports, 1 Pre-Approvals (indicated by a red arrow).
- Expenses** (blue header):
 - 1 Draft, 0 Returned, [View All Submitted](#), [+ Create](#)
- Pre-Approval** (blue header):
 - 0 Draft, 0 Returned, [View All Submitted](#), [+ Create](#)

Review a Pre-Approval Request

Click the **Pre-Approval** document that needs to be reviewed.

- Note: The description should include the traveler's last name, destination, and trip departure date in the header.

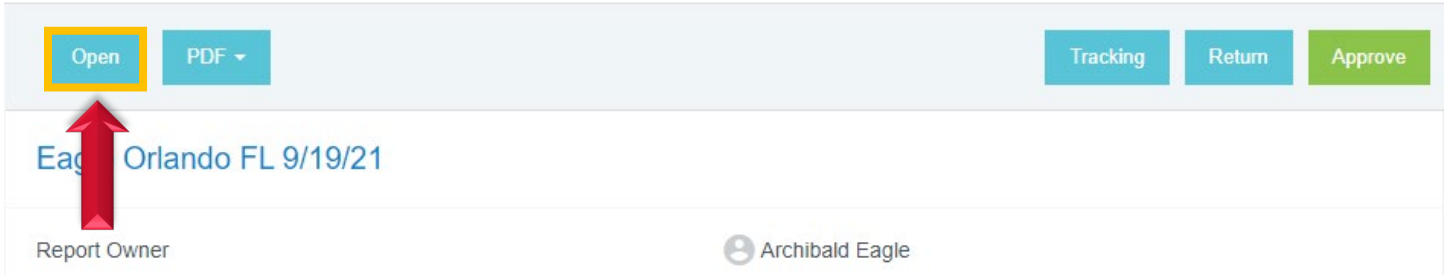
The screenshot shows the Chrome River interface with the following details:

- Header: **Approvals Needed** (orange bar)
- Navigation: **Expense Reports** | **Pre-Approvals** (selected)
- Table:

REPORT OWNER	SUBMIT DATE	AMOUNT SPENT	
Eagle, Archibald Eagle Orlando FL 9/19/21 QA0000738:146	08/06/2021	1,438.00 USD	✓

The Pre-Approval Header opens at the right for review. **Scroll down** to assess the Pre-Approval’s **Trip Information, Comments, and Attachments**.

- Note: Click **Open** to open the Pre-Approval in the Pre-Approval Report view, which will provide additional details for each expense estimate.



Comments:

You, the approver, may also add notes to the Comments section. To include notes, enter remarks in the text box provided and click **Post**.

- Note: Notes are visible to **ALL** accessing the report. Once a note is posted, it cannot be deleted.
- Note: If you add a note to the Comments section, the traveler is **not** notified.

Attachments:

- Additional documentation may be added (PDF, PNG, and JPEG formats only).
- Documents may be dragged to the elected area or added via the **Upload Attachments** button.
- When an attachment is added, the image will appear under Attachments.
 - Note: Attachments are visible to **ALL** accessing the report. Once an attachment is uploaded, it cannot be deleted unless the Pre-Approval is returned to the user.

Approve a Pre-Approval

When a review of the Pre-Approval is completed:

- Click **Approve** if no changes/adjustments are needed. The Pre-Approval will proceed to the next approval queue.

