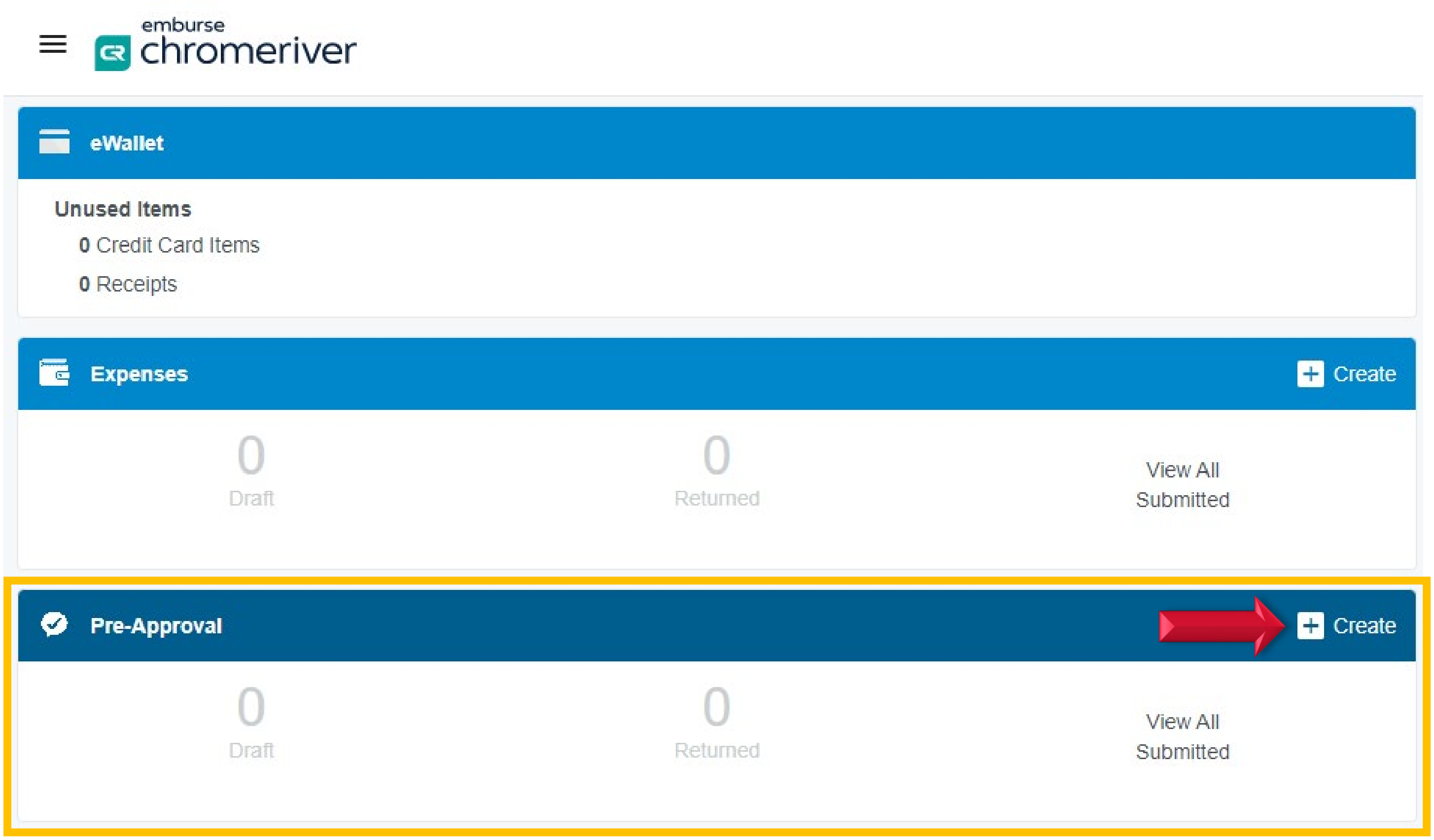
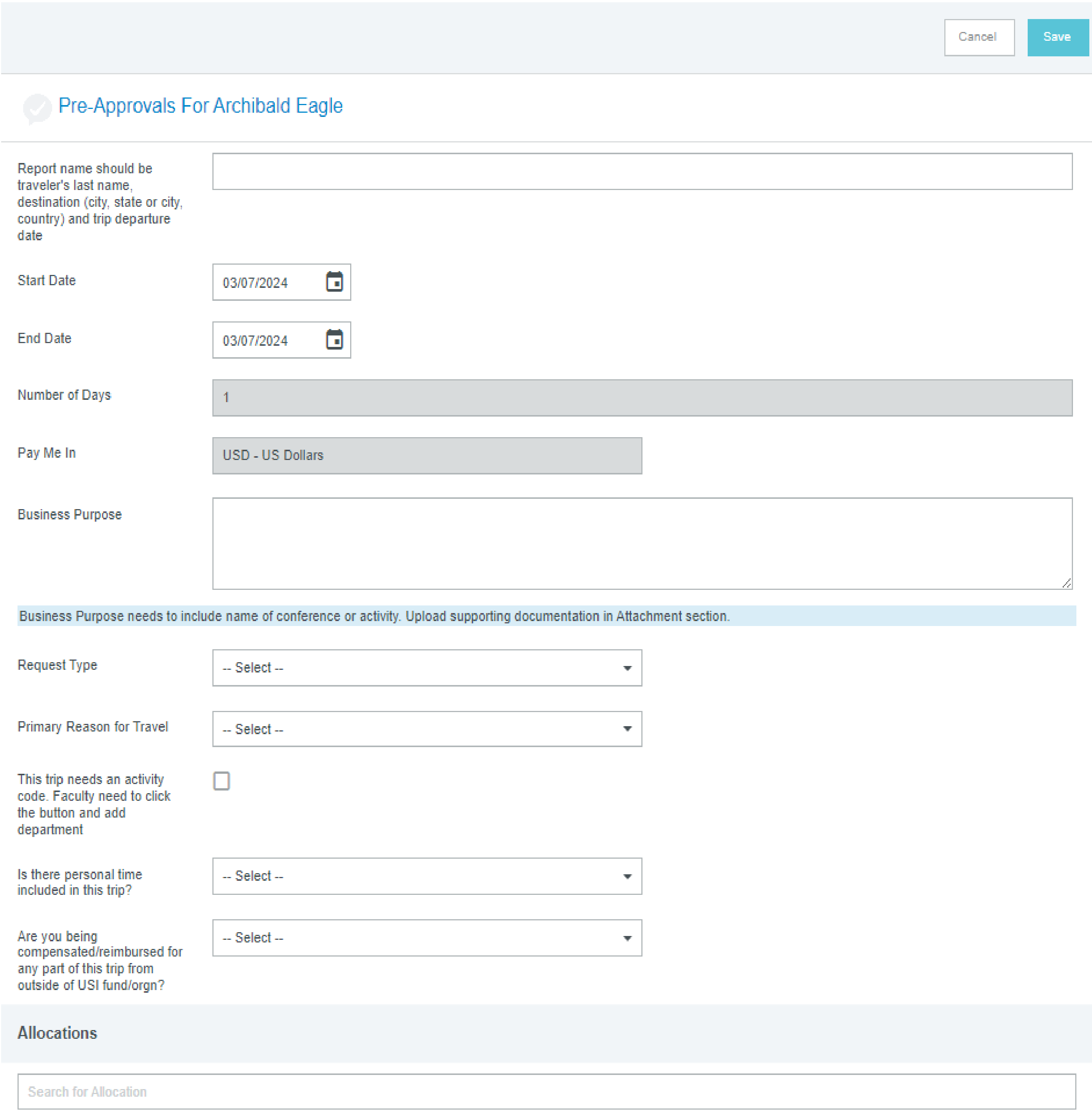
Creating and Submitting a Pre-Approval

Step 1: Complete the Pre-Approval Header

Click **+Create** in the top right-hand corner of the Pre-Approval ribbon.



Complete the **Pre-Approval Header**.



Report Name

Enter your last name, destination (city and state or city and country), and trip departure date. No punctuation. Maximum of 45 characters allowed, including spaces.

- *Tip*: Use the two-letter state abbreviation and short date format.
  - Example: Smith Terre Haute IN 14Oct24
  - Example: Williams Paris France 11/3/24

Start Date and End Date

Dates range from when you leave campus/home to when you return to campus/home.

Business Purpose

Provide details that answer what and why the university is supporting travel:

- Example: Attending the CBA Conference to learn how ZYX Software works for the department.

Request Type

Select the option that best fits your request type.

Travel Type

Select the option that best fits your travel type.

Primary Reason for Travel

This statement will appear for several travel types, but not all. When applicable, choose the most relevant option available. When Other is selected, enter a detailed response in the text box provided.

This trip needs an activity code

If an activity code is needed for the trip expenses, then check the box and select the applicable code from the Activity Code drop-down list.

- Faculty must check this box and select their department from the drop-down list. If your department is not listed, then choose the department where your chair resides.

Is there personal time included in this trip?

Select **Yes** or **No**.

- If Yes, then enter the dates in the text box labeled *Please list the dates of personal time*.

Are you being compensated/reimbursed for any part of this trip from outside of a USI fund/org?

Select **Yes** or **No**.

- If Yes, then in the text box labeled Outside Fund Details, you may either enter the source and amount of funding or the source and list the expenses being covered.
  - Example: ZYX Organization is giving me $500 to cover travel expenses
  - Example: CBA Organization is paying for my airfare and hotel expenses

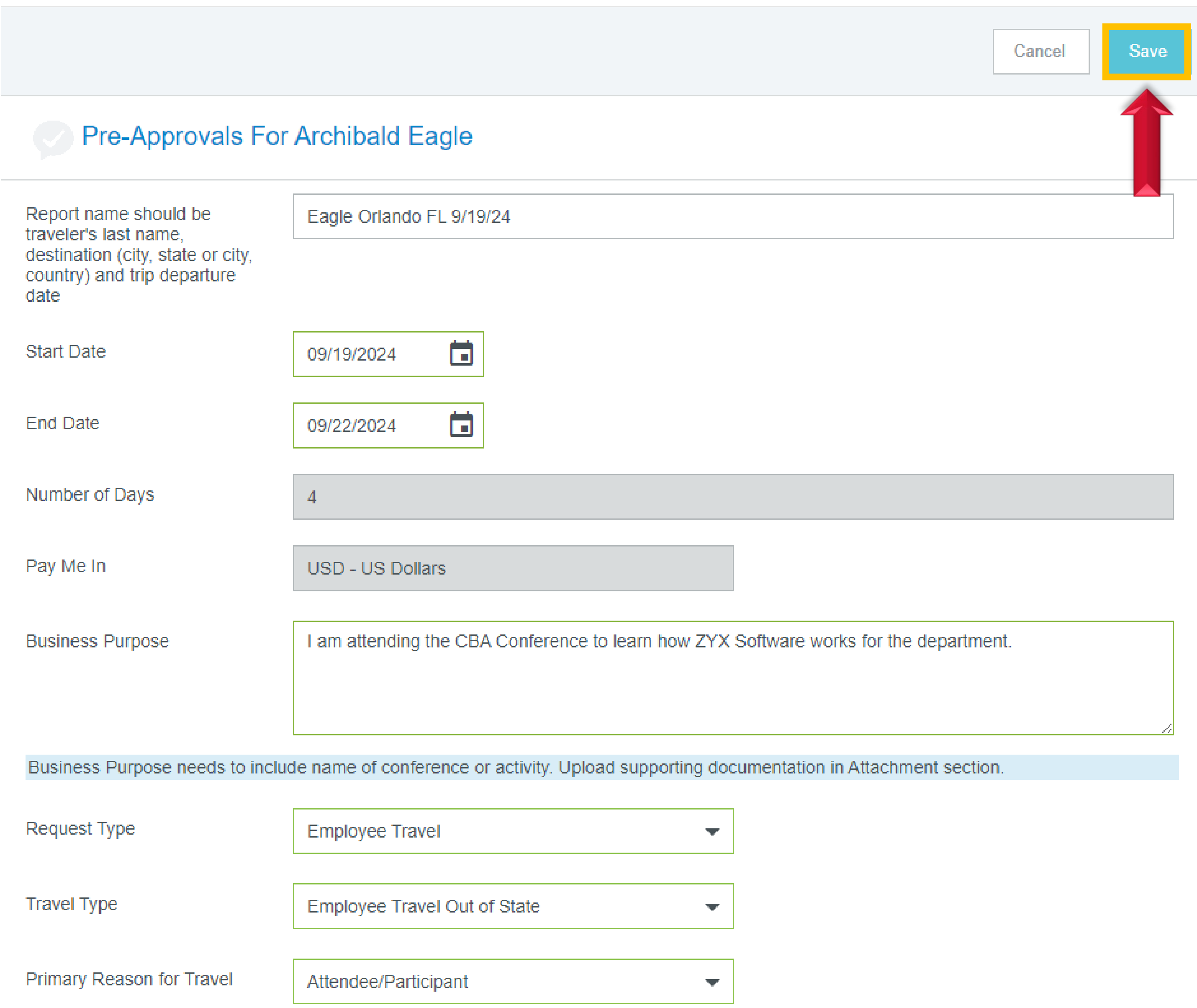
Allocations

Select the funding source for the trip.

- *Tip*: To narrow the search list of Fund Orgs, type the index code or the department name.
- *Tip*: Only enter one Fund Org for multiple Fund Org allocations at this stage. You will have the opportunity to add additional Fund Orgs in Step 4 of this guide.

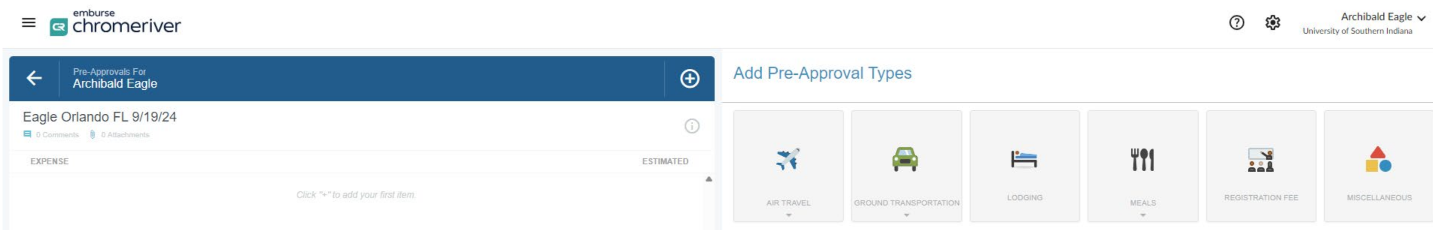
Important: Review **ALL** the information on the Pre-Approval Header:
Although changes may be made to most areas of the Pre-Approval Header, a change cannot be made to the Request or Travel Types after saving it. If an error has been saved for either the Request or Travel Types, then a new Pre-Approval will need to be created, and the incorrect one will need to be deleted.

After confirming the information is correct, click **Save**.

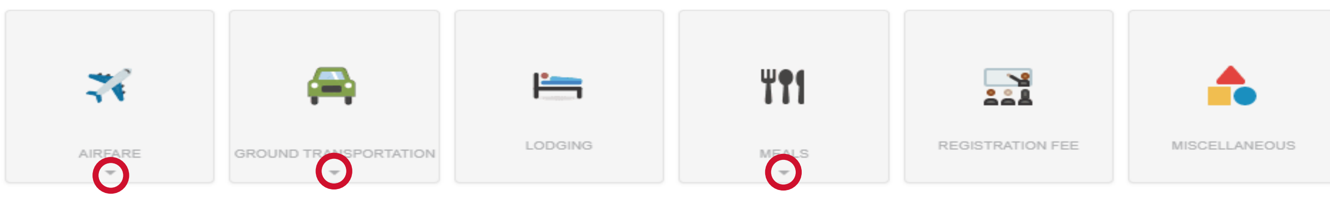


Step 2: Add Expense Estimates to the Pre-Approval

Below is the screen that will appear after the Pre-Approval Header has been populated and saved. This is called the Pre-Approval Report.

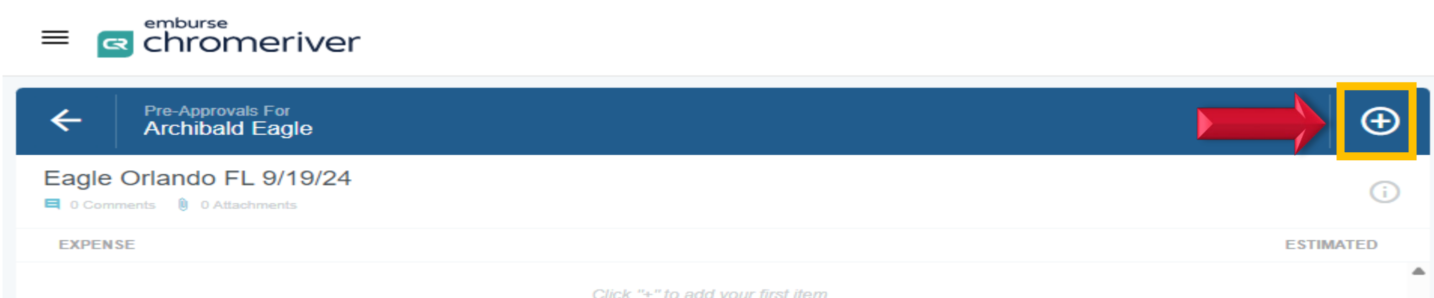


There are six Pre-Approval types, called expense tiles, from which to choose. To add a tile, click on the desired one and enter the required information. Tiles with a gray triangle (circled in red) contain sub-tiles with additional options. To see these selections, click the respective tile.



- If funding support is limited (less than the anticipated cost of the trip), then only select the tile(s) necessary to reach the total funding support amount.
  - Example: $1,200 in total funding support, enter enough tiles to add up to $1,200 (e.g., $500 Airfare and $700 Lodging).
- *Tip*: If your allotted trip funding allows, then reasonably cushion the trip estimates as prices often fluctuate. Specifically, airfare prices may change between the time a Pre-Approval is submitted and the air itinerary is purchased.
- *Tip*: Notes about the estimated total trip cost can be added to the Comments section of the Pre-Approval but are not required. This will show approvers reviewing the Pre-Approval, the actual cost of the trip, and what the traveler is potentially paying out-of-pocket (personal funds).
  - Example: Allotted funding is $1,200; Total trip cost estimated at $1,750.

Tip: If the screen with the tiles is not visible, then click the Plus Button, which appears as a circle with a plus sign inside it.



Air Travel

Bag fees should be included with the airfare amount. Separate the fees when completing the Expense Report.

Meals – sub-tiles

Important: No Per Diem is paid for same-day travel, which is defined as travel with no overnight stay.
View Travel Procurement's [Per Diem Rates] webpage for more information.

- **Per Diem Wizard**: is the primary method to calculate Per Diem for the individual traveler.
  - View the guide *Using the Per Diem Wizard*.
- **Meals – Business**: is the primary method used to enter Per Diem for specific travel types such as Athletics teams and group trips with students.
- **Meals—Per Diem:** is NEVER used. For Chrome River to calculate per diem correctly in the wizard, this sub-tile must appear as an option.

Registration Fee

Membership fees may be included with the registration fee amount. Separate the fees when completing the Expense Report.

- *Tip*: This includes entry fees, park tickets, museum tickets, etc.

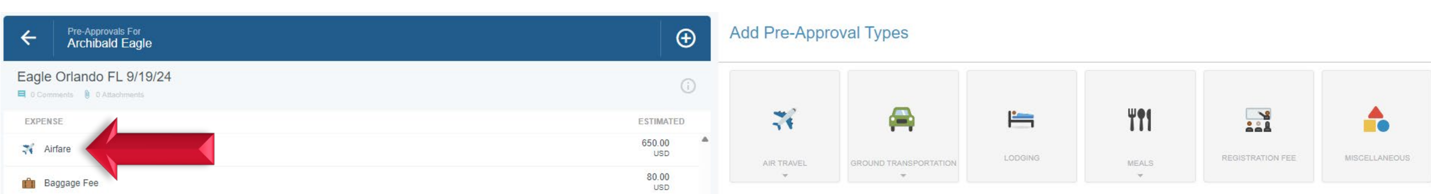
Miscellaneous

Use when an appropriate tile is not applicable.

- *Tip*: Email USI's Chrome River Help Desk (chromeriver.helpdesk@usi.edu) if unsure.

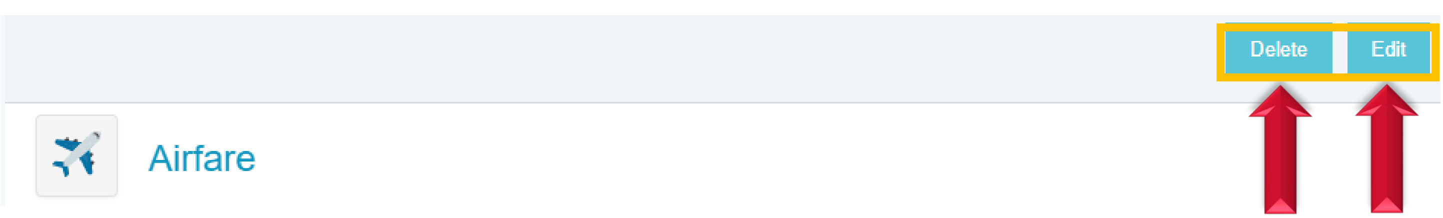
Delete or Edit a Tile

Click the **Tile** from the left-hand side, which needs to be deleted or edited.



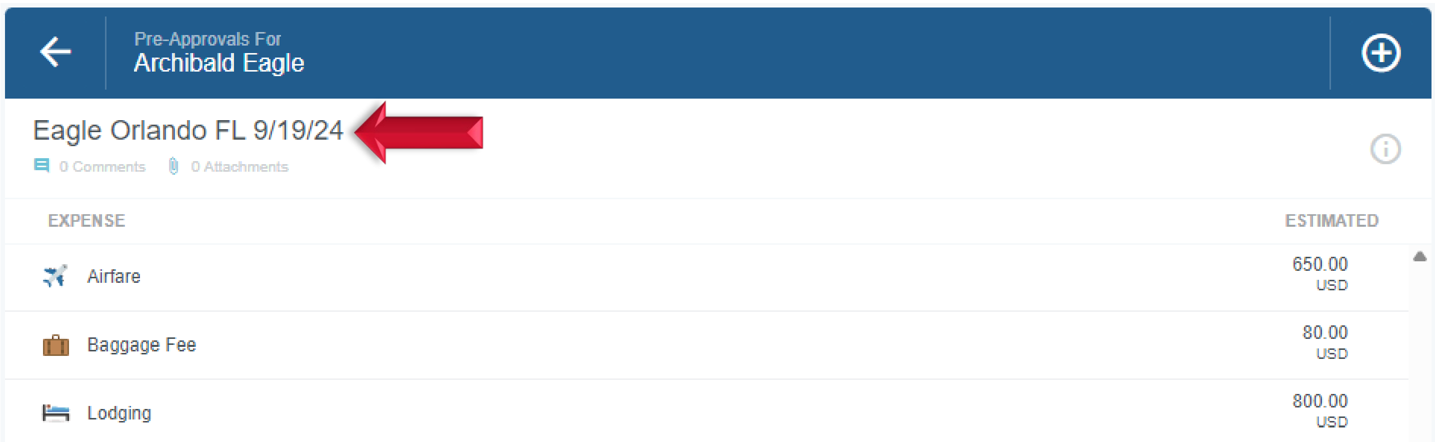
Delete will remove the tile, and **Edit** will allow changes.

- View the guide *Deleting a Pre-Approval* if a whole Pre-Approval needs to be deleted.

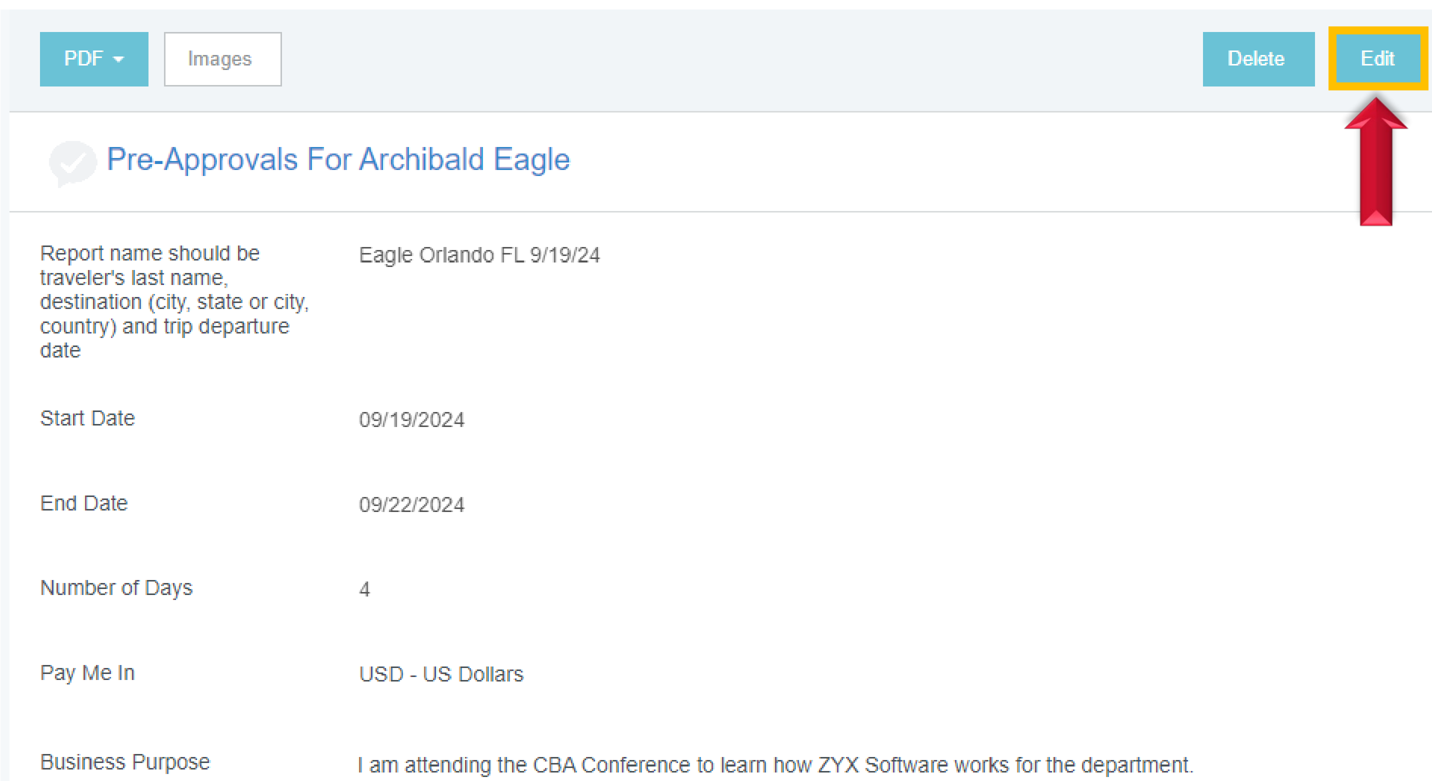


Step 3: Add Comments and Attachments

Click the Report Description on the left-hand side to add Comments and Attachments.



Click **Edit**.



Scroll down inside the Pre-Approval Report Header section until the **Comments** and **Attachments** sections are in view.

Comments

Use this area to:

- Enter web link for conference/event information, if applicable.
- Provide other travelers' names or number of travelers, especially if traveling with students.
- Communicate information to financial manager(s) or others in the approval routing, if applicable.
- Provide other information that may be helpful.

Important:

- Comments are visible to **ALL** who can access the Pre-Approval Report and will appear on the approval email notifications. They are also permanent and once posted, they cannot be deleted.

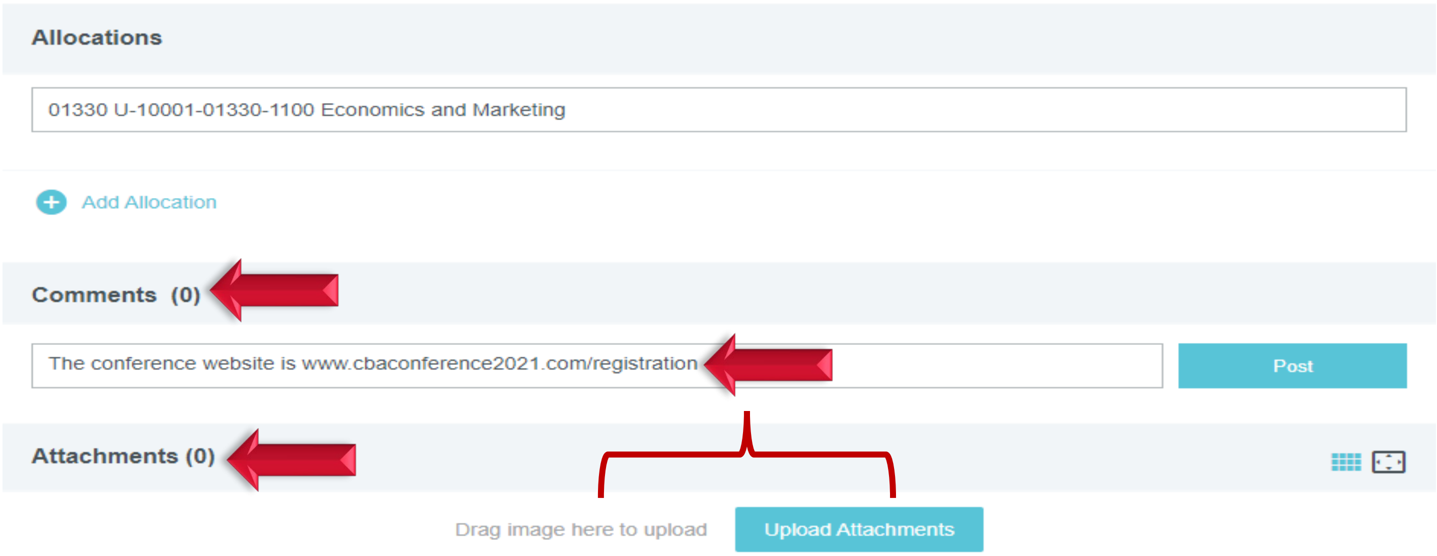
Attachments

Use this area to upload:

- Conference schedule, research trip itinerary, recruitment travel agenda, letter of invitation, etc.
- Documents for internal communication, such as a class coverage schedule.
  - *Tip*: A document with information about the purpose and dates of the event/trip must be uploaded. If no document is uploaded, then Travel Procurement may return the Pre-Approval to you so one can be uploaded.

Note:

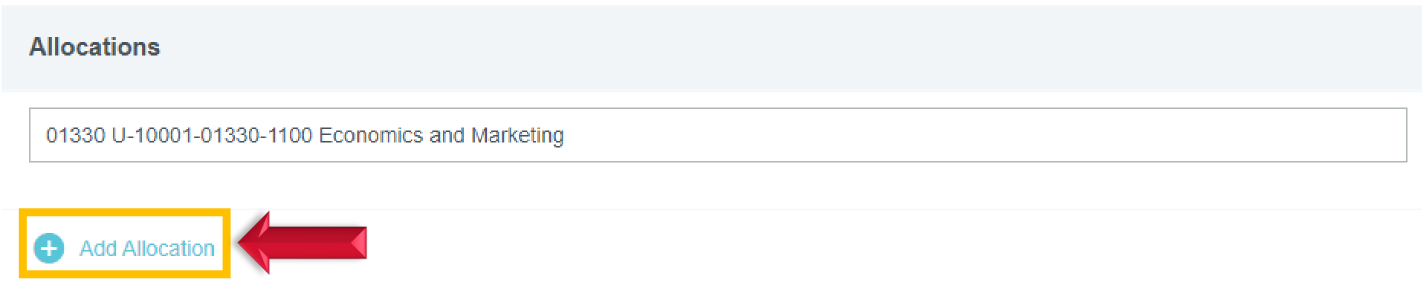
- Chrome River can only attach documents in the following formats: PDF, PNG, and JPEG.
- Documents can be dragged to the elected area or added via the **Upload Attachments** button.
- Attachments may only be removed if deleted **BEFORE** submitting the Pre-Approval Report.
  - *Tip*: Click the file in the Attachments section to remove an attachment. A window will appear on the left, showing the document. Find and click the red trashcan in the upper left-hand corner to delete it.



Step 4: Add Additional Fund Orgs

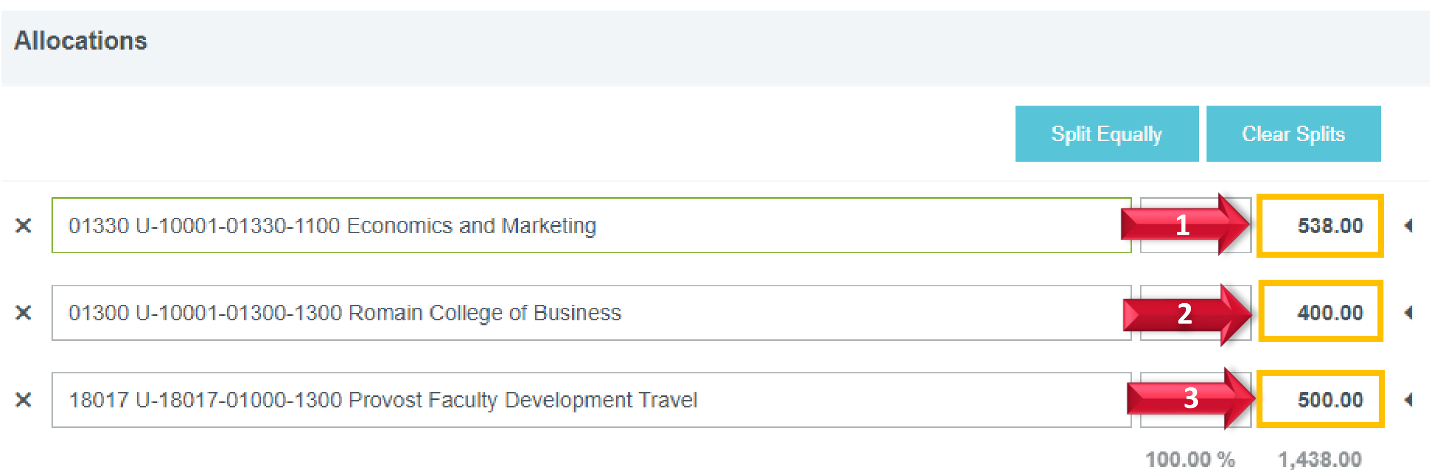
If only one Fund Org is needed for the trip, click Save in the upper right-hand corner and proceed directly to Step 5.

To add another Fund Org, scroll to the Allocations section and click **Add Allocation**. Then select the funding source for the trip (click here for *Tips*).

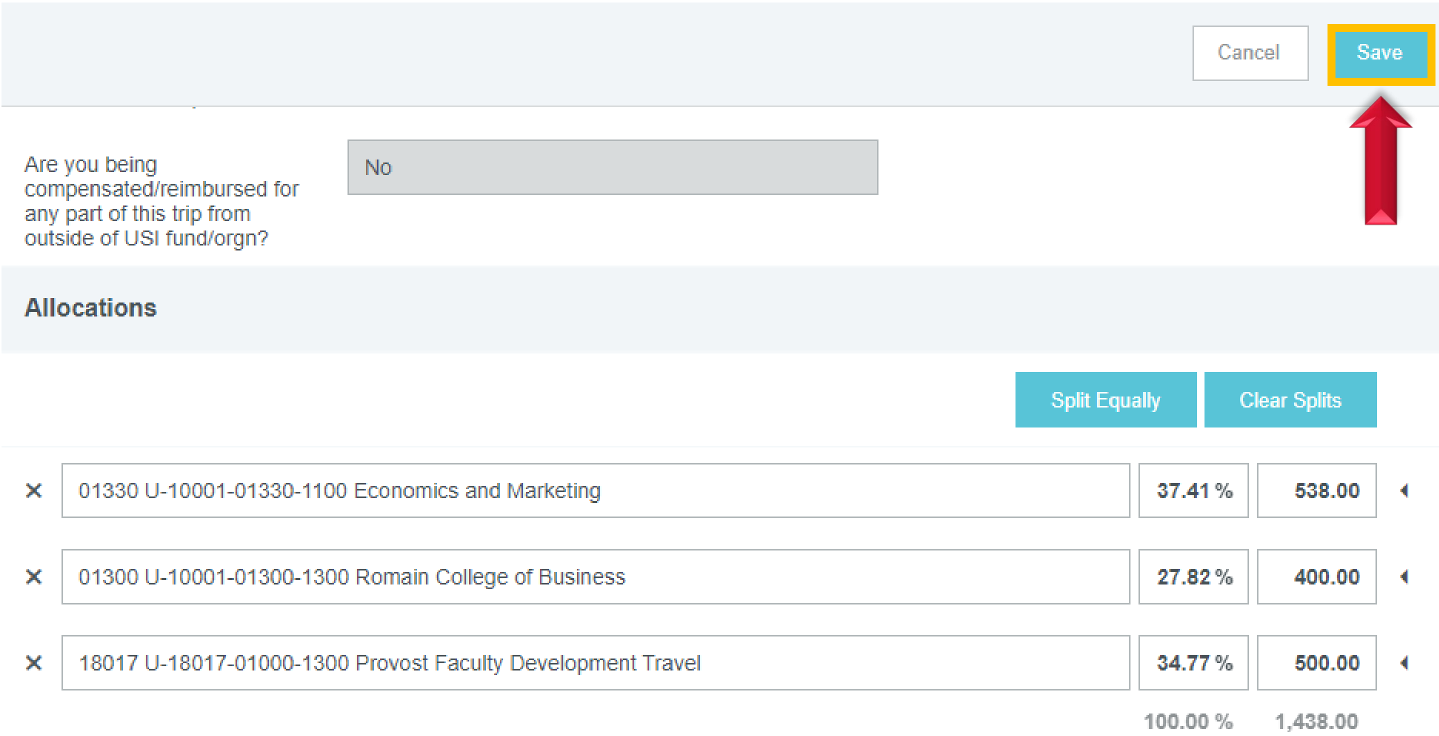


Continue to add Fund Orgs as needed. Then adjust, from the first listed Fund Org to the last (top-down), the amounts being funded by each Fund Orgs.

- Example: If receiving $538 from Dept (1), $400 from College (2), and $500 from Provost (3), then manually type each of the respective amounts in the appropriate dollar column (last column).
    - *Tip*: Ignore the percentages column (middle column).

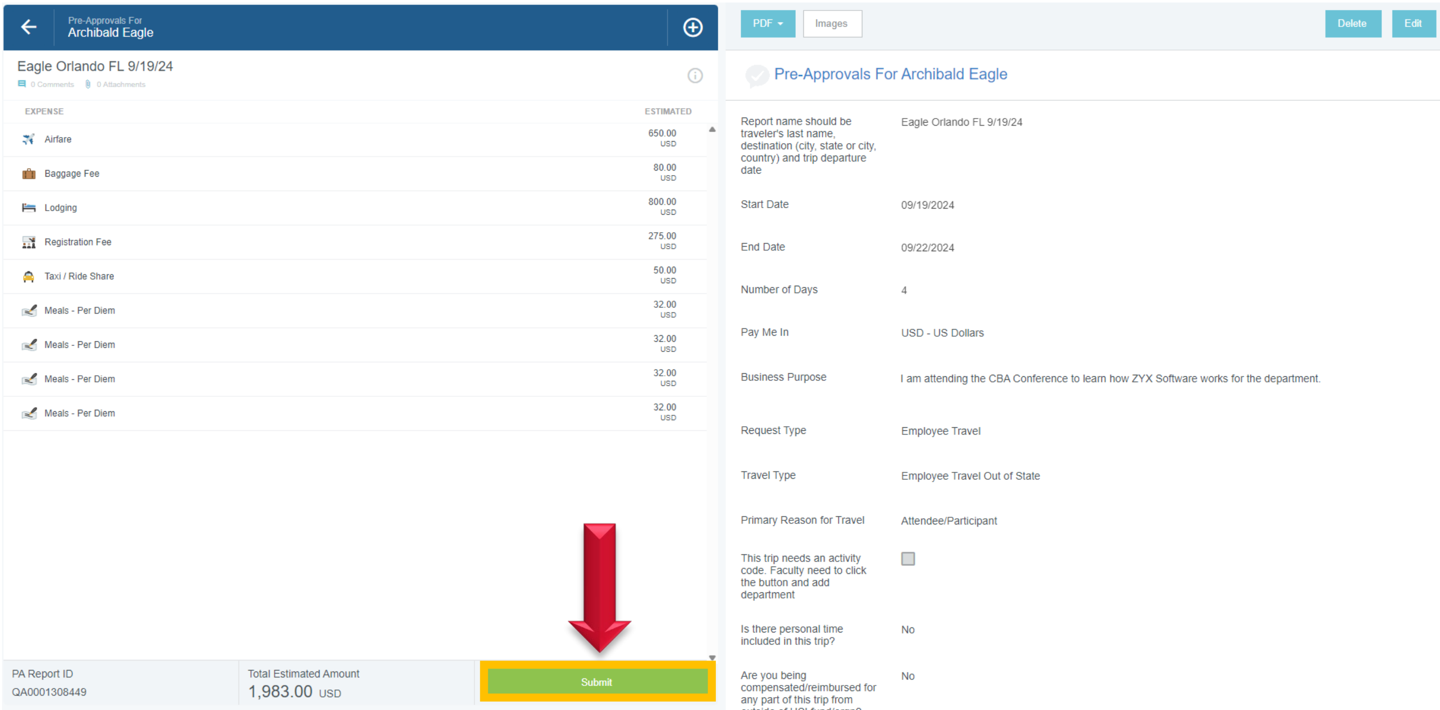


After Comments, Attachments, and Allocations have been added, click **Save**.



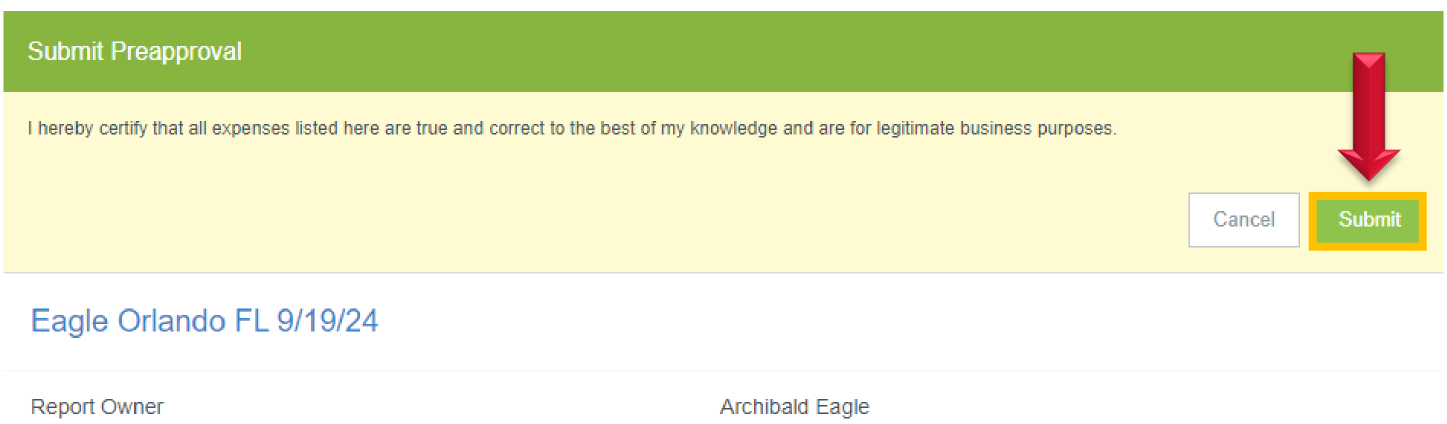
Step 5: Submit the Pre-Approval

Click **Submit**.



An opportunity will be given to perform a final review of all the Pre-Approval trip information.

After the final review, click **Submit**.



If the report was submitted successfully, the message below will briefly appear at the top of the screen.

- View the guide *Tracking a Pre-Approval* to view the Pre-Approval's current approval status.