Directly Reimbursing a Candidate

Step 1: Get a Financial Manager's Approval

Email the financial manager for approval of the candidate's expenses. The email needs to indicate the position number and title, and the Fund/Org to be used for allocation along with the list of item(s) and amount(s) the candidate is requesting for reimbursement. This email will need to uploaded, to the Expense Report, in Step 5.

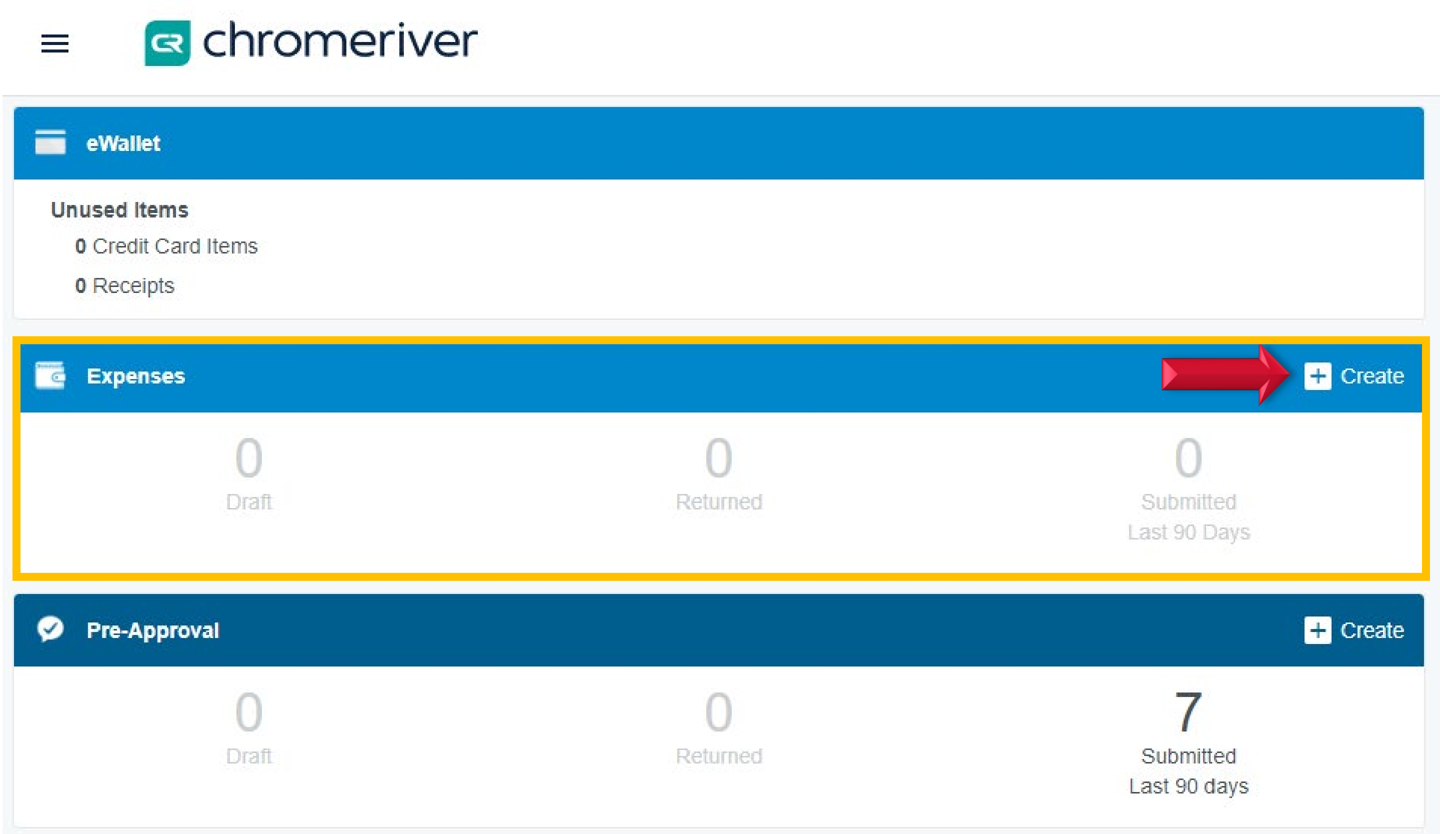
- *Tip*: Reference the example email in the appendix.

Step 2: Select the Candidate's Chrome River Profile

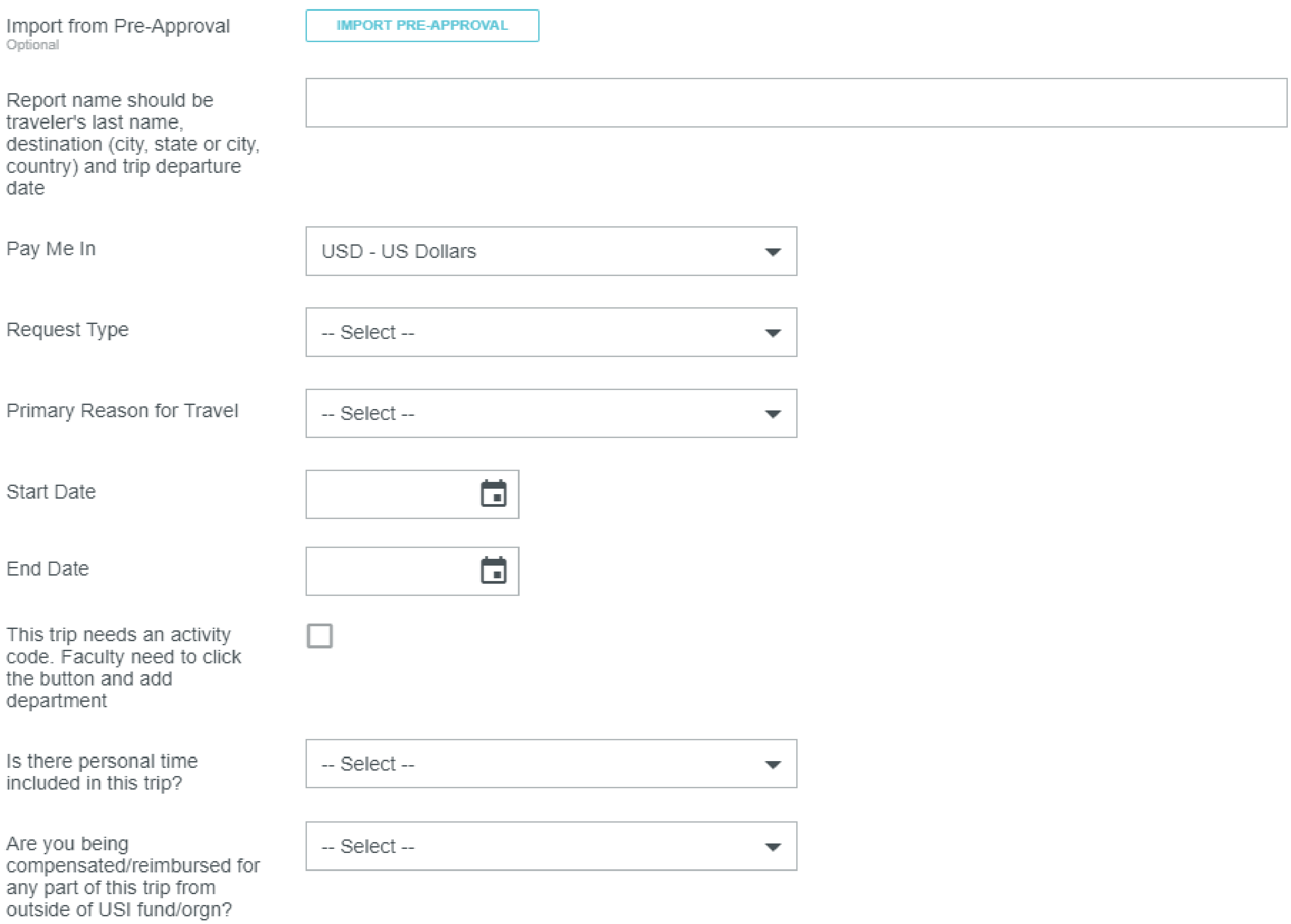
For more details, see the guide *Entering a Pre-Approval/Expense Report on Behalf of a Traveler*.

Step 3: Complete the Expense Report Header

Click **+Create** in the top right-hand corner of the Expense Report ribbon.



Complete the Expense Report Header.



Report Name

Enter CANDIDATE, the candidate's Last Name, the candidate's Home City/State, and the trip start date. No punctuation. Maximum of 45 characters allowed, including spaces.

- *Tip*: Use the two-letter state abbreviation and short date format.
    - Example: CANDIDATE Eagle Bellevue WA 9/1/21

Request Type

Select **Guest Travel**

Travel Type

Select **Travel Candidates**

Start Date and End Date

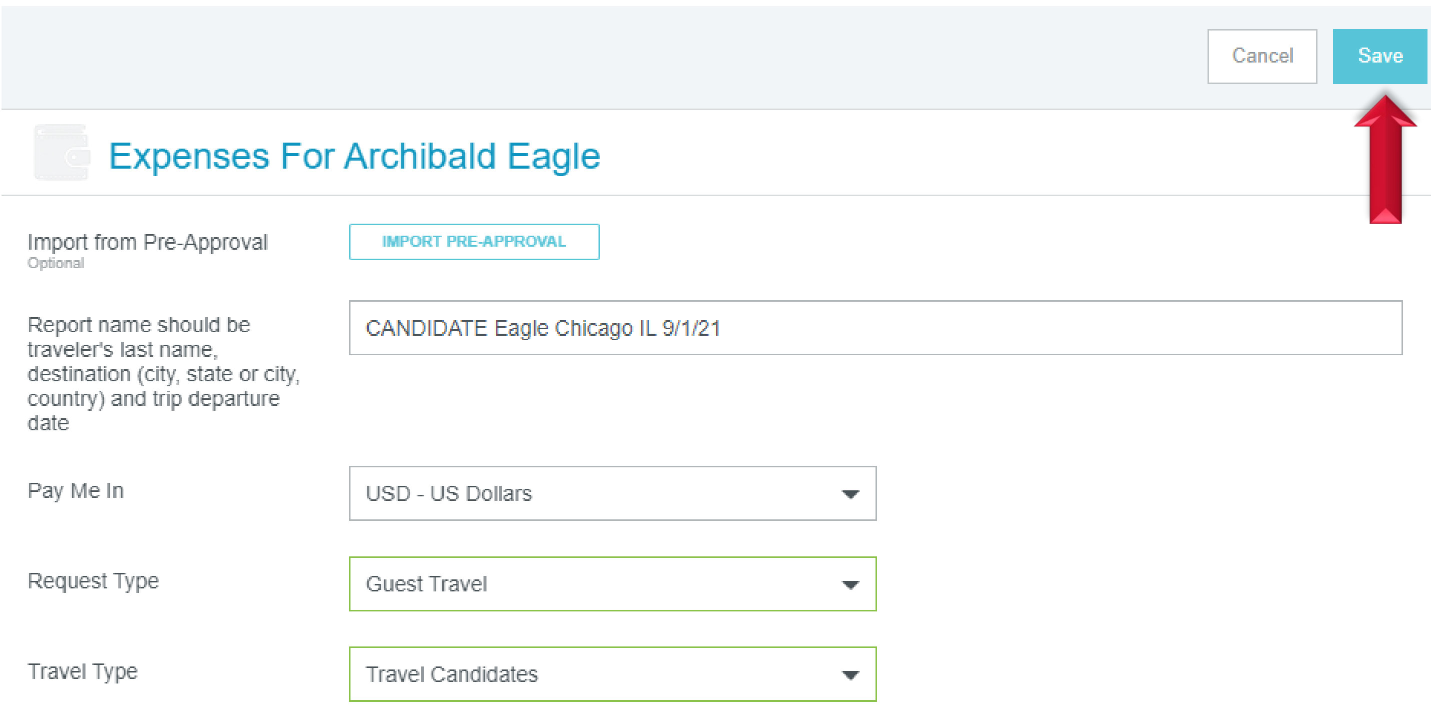
Use date range from when the candidate arrived to campus to when the candidate returned home.

This trip needs an activity code
N/A

Is there personal time included in this trip?
Select **Yes** or **No**.
If yes, then enter the dates in the text box after **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 **No**.

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

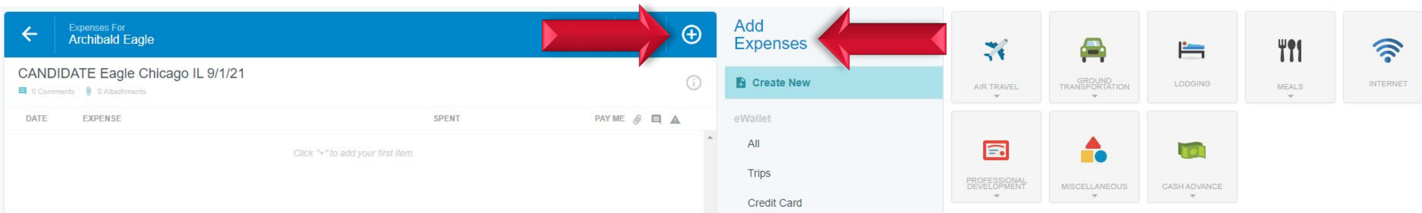


Step 4: Add Expenses

Below is the next screen that will appear.

On the right is the **Add Expenses** menu.

- *Tip*: If the **Add Expenses** menu is not viewable, then click the circle with the plus sign, and the menu will open to the right.



Choose the appropriate mosaic tile for the new expense line item being created.

- *Tip*: Tiles with a gray triangle indicate there are additional options to choose from within those mosaics. To see those selections, click the mosaic tile.

After a mosaic tile has been selected, a new window will open on the right.

Fill in the required fields and then click **Save**.

- *Tip*: There may be other fields to fill in, other than the ones listed below, depending on the expense line item type.

Date
Is the date of the receipt.

Spent
Is the amount listed on the receipt. This amount must match the amount on attached backup documentation.

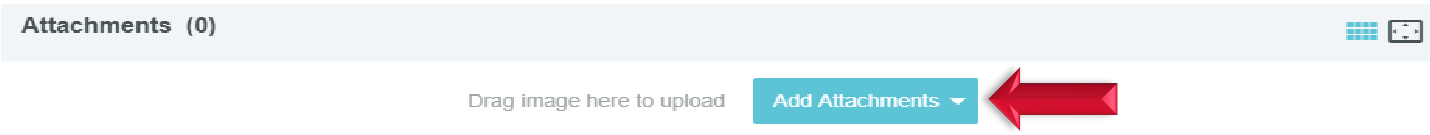
Business Purpose
Is required for all line items. The information provided should answer the question of ‘WHY’ this is considered a reimbursable expense to the candidate.

Description
Is required for certain line items.

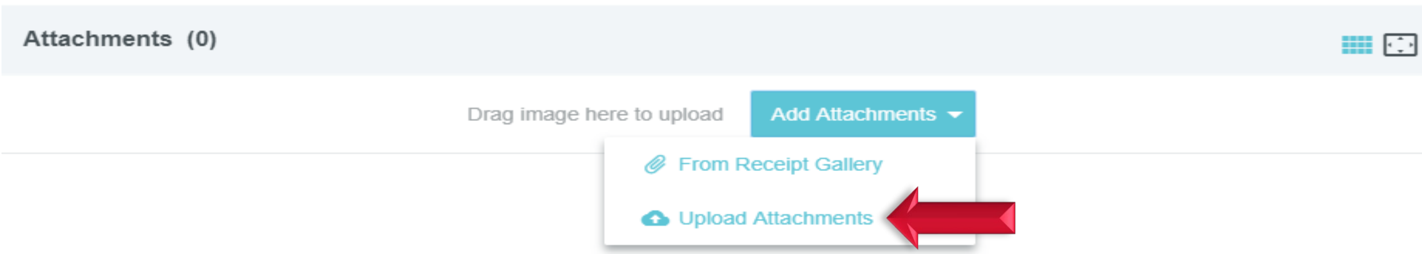
Allocation
Is based on Fund/Org from which the candidate’s expenses are being paid.

Attachments

Each expense requires a receipt. To upload a receipt, click **Add Attachments**.



Select **Upload Attachments**. Upload the receipt (must be in PDF or JPEG format).

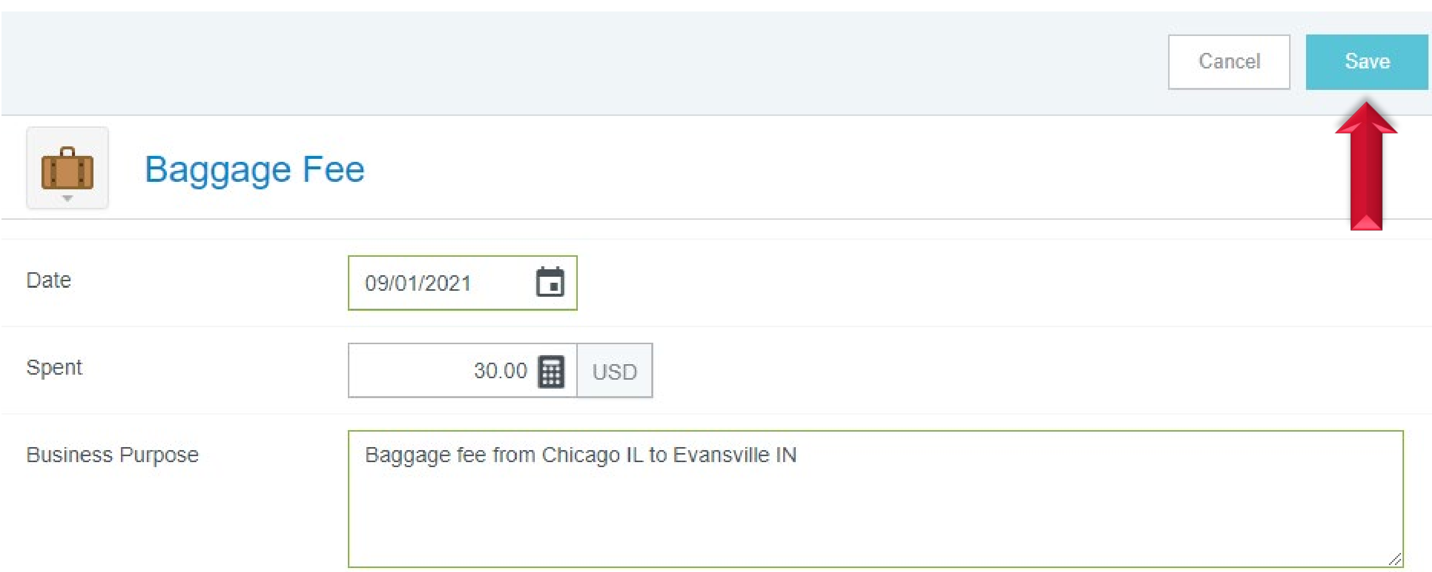


When documents are uploaded, the images will appear under the Attachments section.

- *Tip*: To remove an attachment, click the file in the Attachments section. A window will appear on the left displaying the document. Click the paperclip in the upper left-hand corner to delete the document.

After all required fields are populated and documentation is attached to the expense line, click **Save** in the upper right-hand corner.

- *Tip*: If a warning/violation box appears, then follow the instructions indicated in the box. For more information on warning and violation boxes, see the guide *Policy Compliance Warnings and Violations for an Expense Report*.



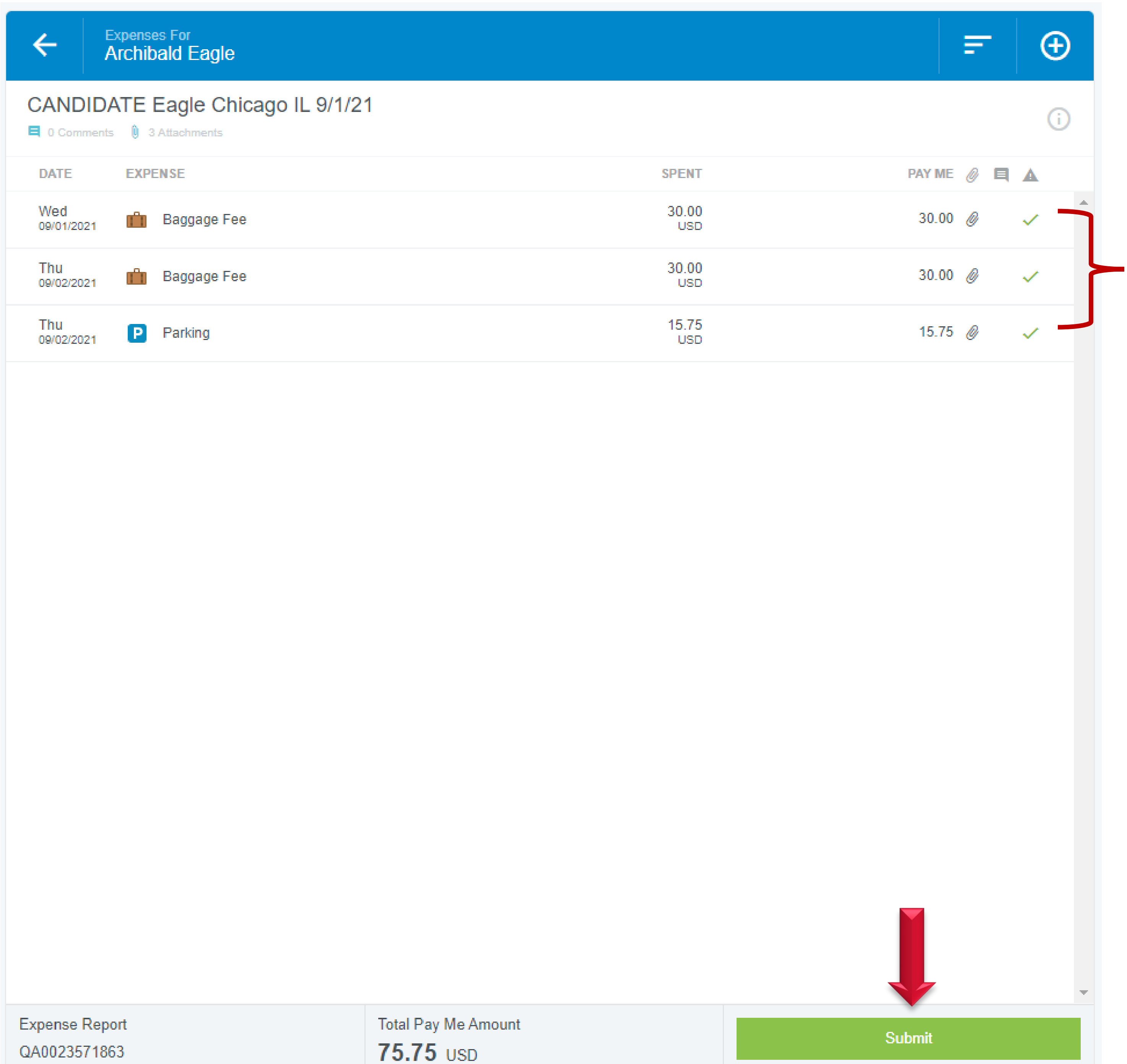
Delete an Expense Line Item

To delete an expense line item, click on the line item. The expense will open in a more detailed window on the right. Click **Delete** and follow the prompts.

Step 5: Submit the Expense Report

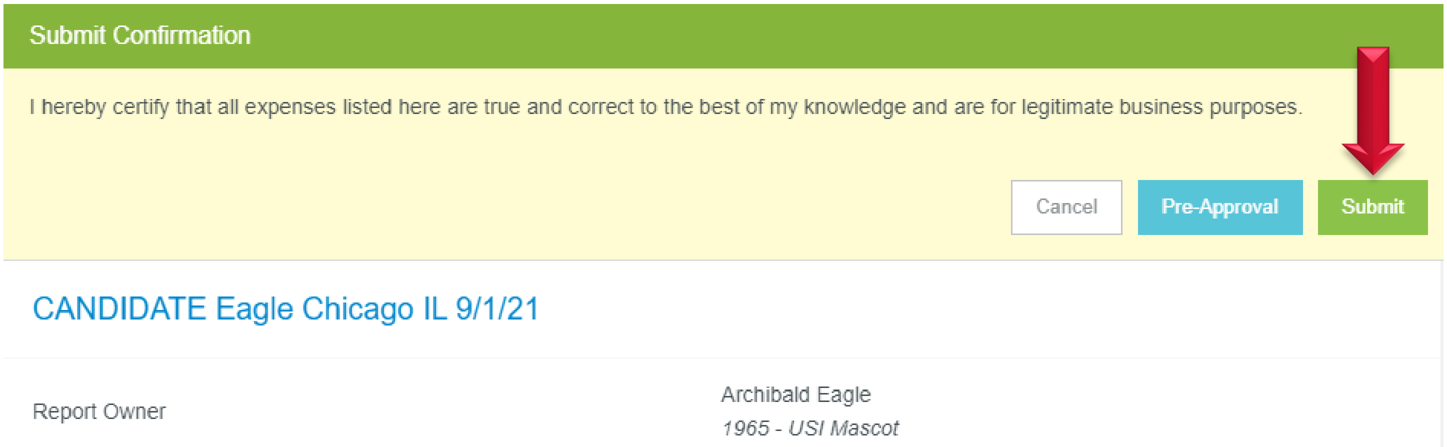
An expense report may only be submitted when all the expenses have green checkmarks.

To submit an open expense report, click **Submit** in the lower right-hand corner of the Expense Summary Section.



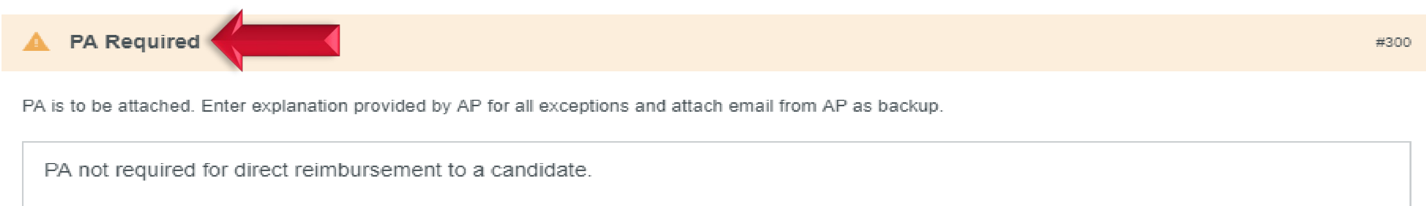
The Submit Confirmation screen will appear. This is the last opportunity to review the Expense Report.

If all the information looks correct, then click **Submit** again.

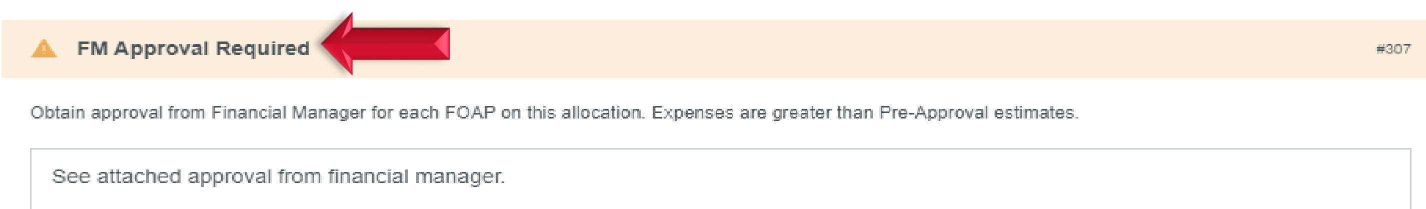


Important: The following two warning violations will appear.

First Warning box: **PA Required**. In the Comments box, enter "PA is not required for direct reimbursement to a candidate."



Second Warning box: **FM Approval Required**. In the Comments box, enter "See attached approval from financial manager."



Next, attach the approval email from the financial manager in the **Attachments** section (PDF or JPEG).

Click **Submit**.

The message below will briefly appear, at the top of the screen, if the report was submitted successfully:

APPENDIX -- EXAMPLE EMAIL

Greetings Dr. Doe:

I am requesting your approval of the following reimbursement request for the travel expenses incurred by Candidate Eagle:

Fund Org to be Charged: 10001 03090

Search Position #: A20007A3

Position Title: Mascot Specialist

Reimbursement Item(s)/Amount(s):

- Bag fee ($60)
- Airport parking ($15.75)

Thank you.

Sincerely,
B. Smith