Expense Report Info to Know

For Everyone:

- Review the University Travel Policy, and any other applicable travel materials (i.e., department travel guidelines).

For Delegates:

- Before you start a report, confirm the traveler's name, and not yours, appears in the top right corner.
    - View the guide to *Entering a Pre-Approval/Expense Report on Behalf of a Traveler (Delegate Mode)*.

For Travelers:

- An Expense Report requires a Pre-Approval report be imported to create the framework of the trip and funding support. Chrome River will only accept a Pre-Approval that is both:
    - Fully Approved, and
    - Active or Not expired

- Each Expense Report submitted or approved reduces the funding amount on the Pre-Approval.
    - When the total amount of all submitted or approved Expense Reports exceeds the Pre-approval amount, then the Pre-Approval becomes expired, and no future Expense Reports can be submitted against it.
    - This does not apply to Expense Reports in draft status.

- Make sure the receipt for each credit card transaction is already available in the Receipt Gallery.
    - Use the Chrome River Snap App for a quick and easy way to add receipts to the Receipt Gallery.
    - View the guides for *Chrome River Snap App* and *Viewing the Receipt Gallery*.

- Chrome River only accepts uploaded documents of the following types: PDF, PNG, and JPEG.

- If a delegate submits an Expense Report on your behalf, then you will receive an email notification from Chrome River that a document awaits your review and approval. You may accept (approve) the Expense Report via the email, or you may log in to Chrome River and accept (approve) it.

- Each receipt, being claimed on an Expense Report, must be a separate expense line item.
    - For example, a taxi ride from the airport to the hotel (receipt #1) would be one expense line item and a taxi ride from the hotel to the airport (receipt #2) would be another expense line item.

- Compliance Warning message (orange box) indicates additional information is required before the expense can be submitted. Either modify the data or enter a reply in the text box provided.
    - View examples and handling of Compliance Warning messages in the guide *Policy Compliance Warnings and Violations for an Expense Report*.

- Compliance Violation message (red box) indicates the expense cannot be submitted for approval and payment based on policies as defined in the system. Either modify the data or delete the expense from the report.
    - View examples and handling of Compliance Violations in the guide *Policy Compliance Warnings and Violations for an Expense Report*.

- To add expense lines to an Expense Report, view the guide *Adding a New Expense Line Item*.