

Returning 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.

☰ eWallet

Unused Items

0 Credit Card Items

1 Receipts

[VIEW ALL 1 UNUSED ITEMS](#)

✓ **Approvals**

Approvals Needed

0 Expense Reports 1 Pre-Approvals

📄 Expenses + Create

1

Draft

0

Returned

[View All Submitted](#)

✓ Pre-Approval + Create

0

Draft

0

Returned

[View All Submitted](#)

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.

☰ chromeriver

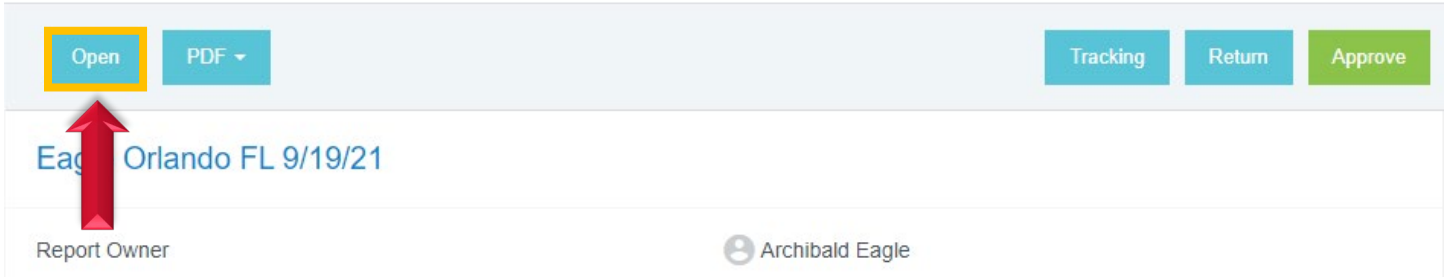
✓ Approvals Needed ☰

[Expense Reports](#) [Pre-Approvals](#)

REPORT OWNER	SUBMIT DATE	AMOUNT SPENT	▲
Eagle, Archibald Eagle Orlando FL 9/19/21 <small>QA0000738:146</small>	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**.

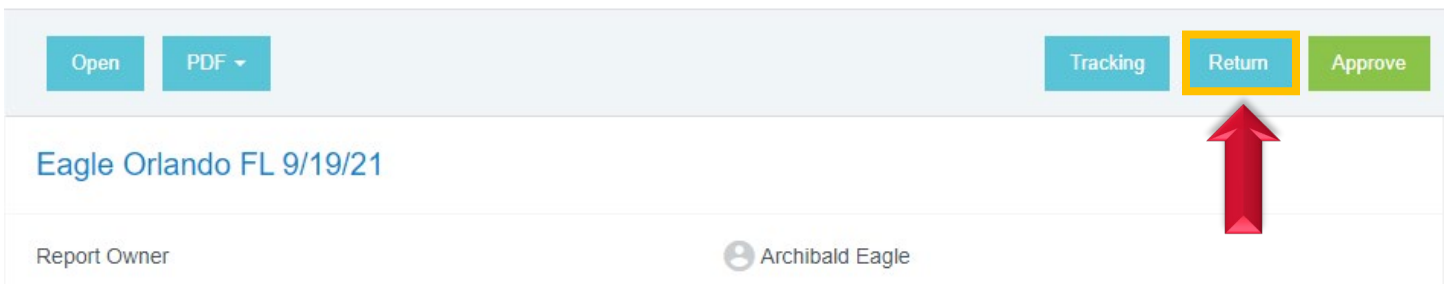
- Note: Click **Open** to open the Pre-Approval in the Pre-Approval Report view, which will provide additional details for each expense estimate.



Return a Pre-Approval

When a review of the Pre-Approval is completed:

- Click **Return** if changes/adjustments are needed.




A comment is required when returning the Pre-Approval. After the comment is entered, click **Return**.

- Comments may give direction on items that need to be provided/changed, such as the Fund Org selected, a change (increase/decrease) in funding amount entered, uploading of documentation, etc.
- The traveler will receive a notification email regarding the returned Pre-Approval.
- After the traveler has made the requested change(s) and re-submitted the report, the Pre-Approval will be routed back to the financial manager for review/approval.

Return Comment

Upload documentation showing the event’s information. Then resubmit the Pre-Approval.



Cancel

Return