Returning a Pre-Approval Submitted by a Delegate

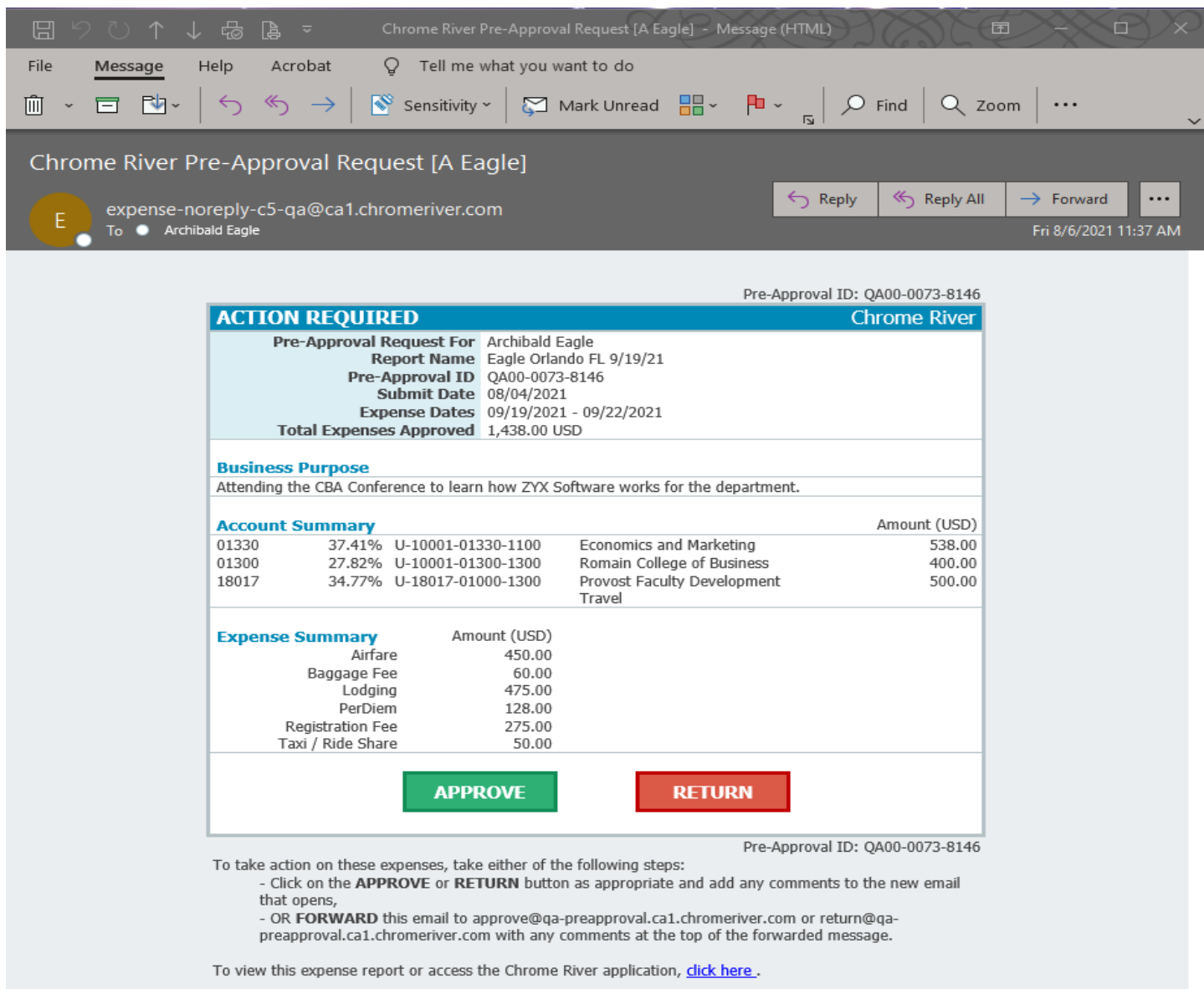## Receive a Chrome River Pre-Approval Request Email

If you have a delegate create your trip Pre-Approval in Chrome River, once the delegate submits it, then you will receive an email from Chrome River requesting action from you (the traveler).

The email provides a brief overview of the Pre-Approval information.
- Note: Comments and documents uploaded to the Pre-Approval are **not** included with the email. To view these items, log in to Chrome River.

You must either Approve or Return the Pre-Approval. This guide will review the two ways to **Return** a Pre-Approval: Through Email and Through Chrome River.
- Note: To Approve a Pre-Approval, view the guide *Approving a Pre-Approval Submitted by a Delegate*.

Return a Pre-Approval – Through Email

Review the Pre-Approval email, and if changes are needed, click **RETURN**.

A new email reply message will open. Enter comments to explain why the Pre-Approval is being returned. Click **Send**.

- You and the delegate will receive an email notification that the Pre-Approval was returned. The Subject of the email will be *Chrome River Pre-Approval Request Returned*.
- If you can't return via email, then view the guide *Fixing Issues with Approving/Returning via Email*. You may also return the Pre-Approval by logging in to your Chrome River account.
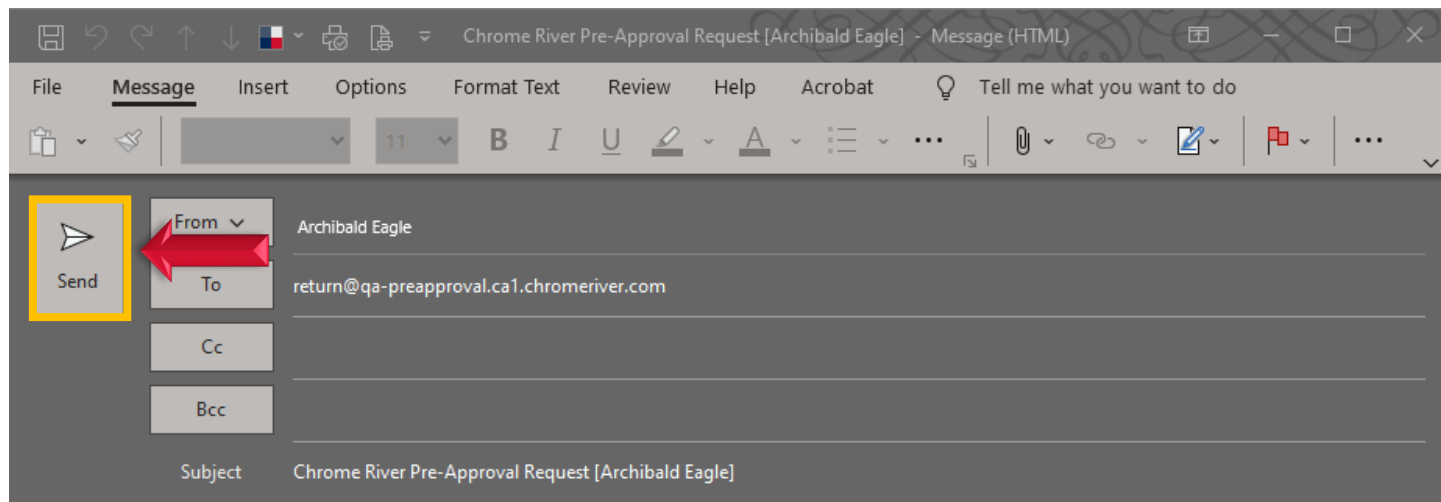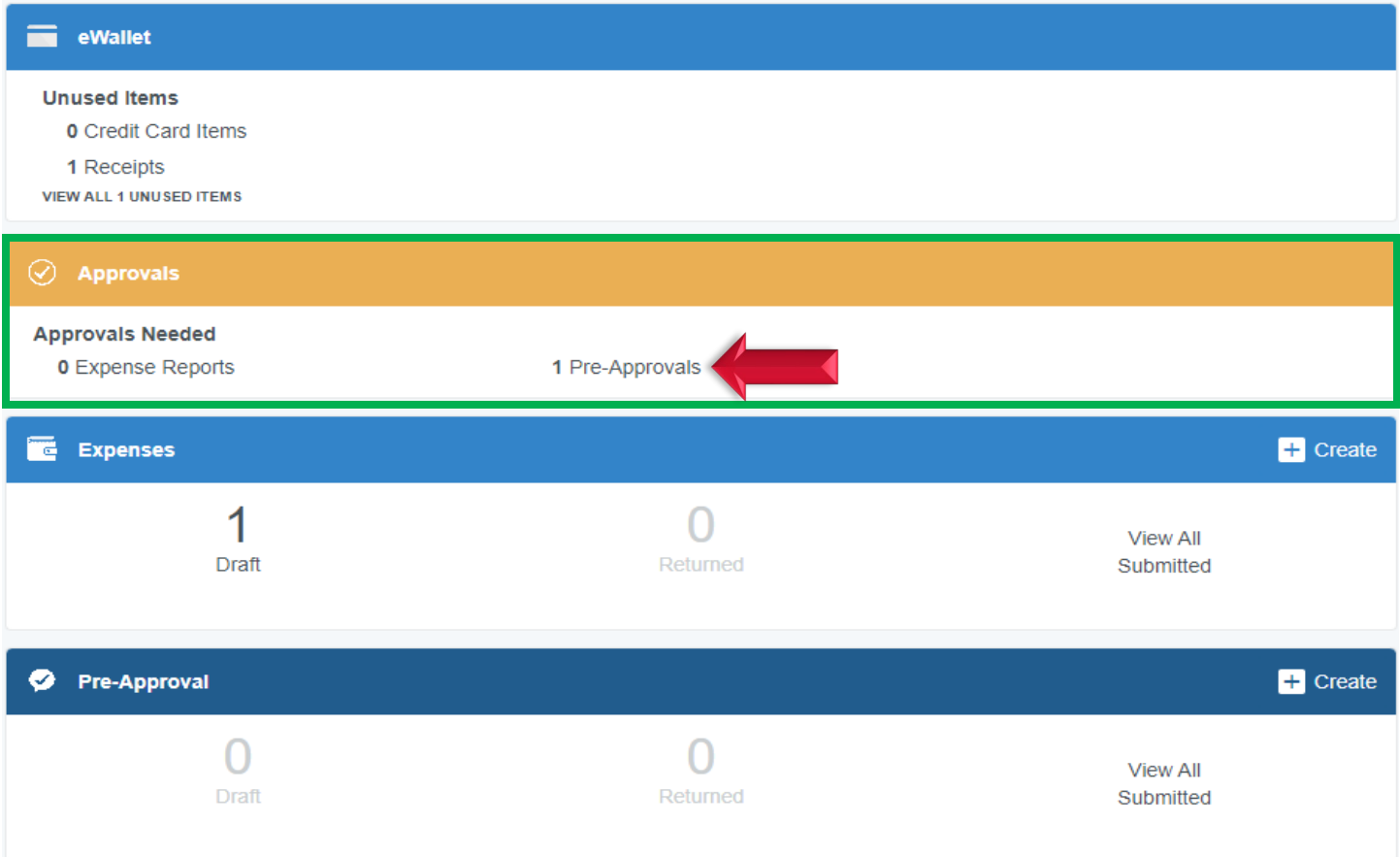
IMPORTANT:

The traveler or the delegate must log in to Chrome River, make the necessary changes, and then resubmit the amended Pre-Approval. Regardless of who makes the changes, the traveler or delegate, the traveler **must** still approve the amended Pre-Approval (through Email or through Chrome River).

Return a Pre-Approval – Through Chrome River

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

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

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

- Note: Click **OPEN** to see the Pre-Approval Report, which provides more details of each expense estimate.
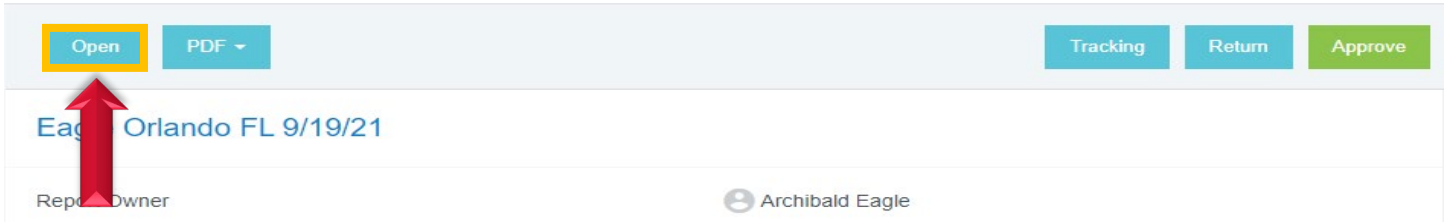
Review the Pre-Approval, and if changes or additions are needed, click **Return**.

- Note: All Pre-Approvals **must** be returned if a change or addition is needed. The traveler may only edit a Pre-Approval created by a delegate after it is returned.

A comment is required when returning a pre-approval. Enter a comment to document why the Pre-Approval is returned. After the comment is entered, click **Return**.

Comments are visible to anyone accessing the report and cannot be deleted once posted.

- Note: Comments may give direction on additional items that need to be provided or changed, such as a change in the Fund Org selected, a change (increase/decrease) in the funding amount entered, etc. You will receive an email notifying you that your Pre-Approval has been returned.

IMPORTANT:

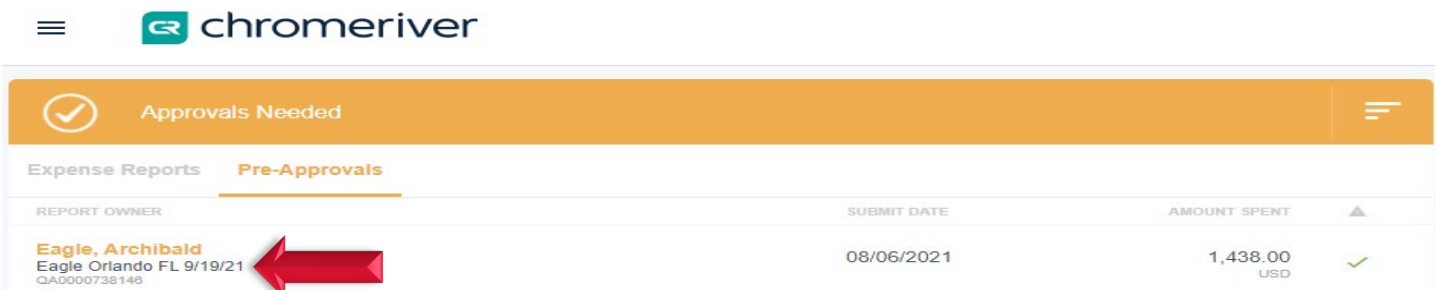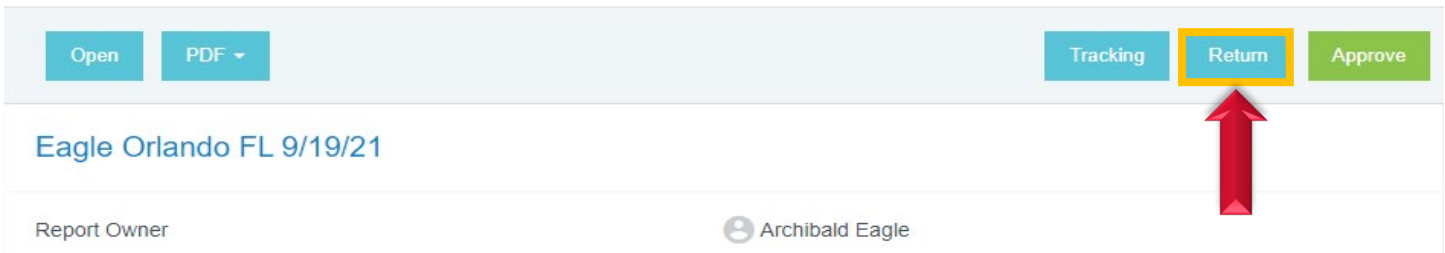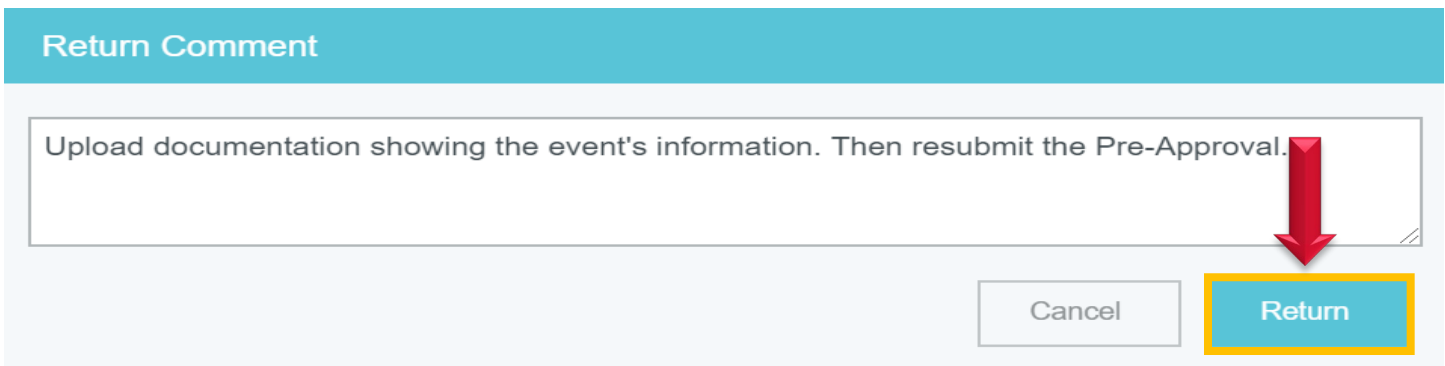You and the delegate will receive an email notification that the Pre-Approval was returned. The Subject of the email will be *Chrome River Pre-Approval Request Returned*. You or the delegate must log in to Chrome River, make the necessary adjustments to the Pre-Approval, and resubmit it.

Regardless of who makes the changes, the traveler or delegate, the traveler still **must** approve the amended Pre-Approval (through Email or through Chrome River).