

Returning an Expense Report Submitted by a Delegate

Receive a Chrome River Expense Approval Email

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

The email provides a brief overview of the Expense Report information.

• *Tip:* Comments and documents uploaded to the Expense Report are <u>not</u> included with the email. To view these items, log in to Chrome River.

You must either Accept (Approve) or Return the Expense Report. This guide will review the two ways to **Return** an Expense Report: <u>Through Email</u> and <u>Through Chrome River</u>.

• *Tip:* To Approve an Expense Report, view the guide *Approving an Expense Report Submitted by a Delegate*.

| 日 シ (个) 品 ほ 。 File Message Help Acrobat Q Tell me what you want to do | Chr | ome River Expense Approval (P | atricia Tieken] – Message (HTN | AL) | _ | X EXX 3 | |
|---|---|--|--------------------------------|--------------------------------------|------------------------------------|--------------------------|--|
| $\fbox{\ } Delete \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $ | Mark compl | Mark Unread | v 🍋 v 📑 💃 Trans | ilate 👻 🔎 Find 🎾 | Search A ⁽¹⁾ Read Aloud | 🔍 Zoom 🛛 👪 Share to Team | ns 🜖 Insights 😶 |
| Chrome River Expense Approval [Patricia Tieken] | | | | | | | |
| expense-noreply-c5-qa@ca1.chromeriver.com To Treken, Patricia A Concentiver | | | | 5 | | S Reply | ≪ Septy All → Forward •••• Fri 8/20/2021 12:37 PM |
| | | CHROM | ZIVER | | | | |
| | | | | | | | |
| | ACTION REQU | IRED | | Chrome River | | | |
| | Expense Report for Created By Report Name Submit Date Expense Dates Total Expenses | Patricia Tieken Susanne Stanley Tieken Orlando FL 9/19 08/20/2021 08/20/2021 - 08/20/2 725.00 USD | /21 021 | | | | |
| | Account Sum 03090 U-10001 | mary -03090-1400 | Procurement | Amount (USD) 725.00 | | | |
| | Pre-Approval | Summary | Estimated (USD) | Submitted | | | |
| | Airfare | | 450.00 | 450.00 | | | |
| | Baggage Fee | | 60.00 | 0.00 | | | |
| | Lodging | | 475.00 | 0.00 | | | |
| | PerDiem | | 128.00 | 0.00 | | | |
| | Registration Fee | | 275.00 | 275.00 | | | |
| | Totals | | 1,438.00 | 725.00 | | | |
| | Expense Deta | ails | | | | | |
| | 08/20/2021 | Registration Fee | Procurement | 275.00 USD | | | |
| | Business Purpose | Attending the CBA Con | ference to learn how ZYX S | oftware works for the department. | | | |
| | DirectPayVendor | | | No | | | |
| | lbl_udf_GL_ACCT | | | 70310 | | | |
| | Vendor | | | null | | | |
| | Cost Code | | U | 0309070310 | | | |
| | Reason Assigned | Expense Reports subm | nitted by a delegate must be | approved by the Expense Owner. | | | |



Returning an Expense Report – Through Email

Review the Expense Report email and if changes or additions are needed, click Return.

| | Chrome River Expense Approva | ıl [Patricia Tieken] - Message (HTML) | |
|---|--|--|--|
| File Message Help Acrobat 🛛 Tell me what you want to do | | | |
| Delate Archive Ri Mover Renky & Renky All Fonward - Sencitivity - | Mark complex Mark Unread | 💷 x 🖬 x 🛛 👪 Translate x 🔘 Eind 🕕 Searc | h All Read Aloud O Zoom B Share to Teams D Insights |
| Beeze Brower Brower Stephy All Storward Stephymer | G Mark officer | | |
| Chrome River Expense Approval [Patricia Tieken] | | | |
| expense-noreply-c5- qa@ca1.chromeriver.com To + Tinken, Patricis A | | | ← Reply ≪ Reply All → Forward •••• Fil 8/20/2021 12:37 PM |
| ······································ | | | . / |
| | 08/20/2021 Airfare | Procurement 450.00 USD | |
| | Business Purpose Attending the CBA (| Conference to learn how ZYX Software works for | |
| | Ibl udf GL ACCT | 70310 | |
| | Air Class | Economy/Coach | |
| | Cost Code | U-0309070310 | |
| | Reason Assigned Expense Reports su | Ibmitted by a delegate must be approved by the Excense Owner. | |
| | Receipts | View | |
| | Financial Summary | Amount (USD) | |
| | Total Expense Report | 725.00 | |
| | Less Company Paid | 0.00 | |
| | Amount Due Employee | 725.00 | |
| | | | |
| | Expense Summary | Amount (USD) | |
| | Airfare | 450.00 | |
| 2 | APPROVE | RETURN Report ID: QA00-2362-4139 | |
| | | | |
| | Click on the APPRO and add any commen - QF FORWARD this expense.cli.lchromer top of the forwarded fo view this expense report or access the Chrome Rive | VF or RETURN button as appropriate ts to the new email that opens, email to approve Gga- twer.com or return@ga- wer.com with any comments at the message. er application, <u>dick here</u> | |

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

- *Tip:* <u>ALL</u> Expense Report return emails go to the traveler, not the delegate. Add the delegate's email to the CC line of the return email so he/she knows the Expense Report needs to be revised and resubmitted.
- *Tip:* If you cannot return through email, then view the guide *Fixing Issues with Approving/Returning via Email.*



CHROME RIVER USER GUIDE

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|--|---------------------------------|
| File Message Insert Options Format Text Review Help Acrobat Q Tell me what you want to | o do |
| $\square \ \cdot \ \checkmark \ \square \ \bullet \ \blacksquare \ \bullet \ \bullet$ | •• 🛛 🛛 Address Book 🧳 |
| From Y patieken@usi.edu | |
| Send To <u>return@qa-expense.ca1.chromeriver.com</u> | |
| | |
| Bcc | |
| Subject Chrome River Expense Approval [Patricia Tieken] | |
| × · · · · · · · · · · · · · · · · · · · | . 8 · · · · · · 9 · · · · · |
| | |
| 1. Places VERIEV [fram] a mail address. Places use a mail address associated to your Chrome Biyer account | |

1. Please VERIFY [from] e-mail address. Please use e-mail address associated to your Chrome River account.

2. Enter any optional NOTES in the space above this line to have them added to this expense report.

3. SEND this message to the Chrome River automated processing system for your action to be completed.

Report ID: QA00-2362-4139 Email UID: A04BD9AD-2DA4-DD6F-3D3C-148D29990695

The traveler or the delegate may log in to Chrome River and make the necessary changes or additions and then resubmit the amended Expense Report. Regardless of who makes the changes, traveler or delegate, the traveler still must approve the amended Expense Report (through email or through Chrome River).



Returning an Expense Report – Through Chrome River

Log in to Chrome River.

The Approvals ribbon appears on the Home Screen if a document is pending approval. To see the list of Expense Report documents that are pending approval, click **Expense Reports**.

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| eWallet | | |
|--|-----------------|---------------------------------|
| Unused Items 2 Credit Card Items 0 Receipts VIEW ALL 2 UNUSED ITEMS | | |
| Approvals | | |
| Approvals Needed 1 Expense Reports | 0 Pre-Approvals | |
| Expenses | | + Create |
| 5 Draft | 0 Returned | 6 Submitted Last 90 Days |
| 🤣 Pre-Approval | | + Create |
| O Draft | 0 Returned | 14 Submitted Last 90 days |

Click the **Expense Report** document that needs to be reviewed.

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| Approvals Needed | | | Ŧ |
|---|-------------|---------------|---|
| Expense Reports Pre-Approvals | | | Q |
| REPORT OWNER | SUBMIT DATE | AMOUNT SPENT | |
| Tieken, Patricia Tieken Orlando FL 9/19/21 QA0023624139 | 08/20/2021 | 725.00 USD | ~ |



Expense Report summary opens at the right for review.

| ≡ ⊂ chromeriver | | | ⑦ Patricia Tieken ✓ University of Southern Indiana | | |
|---|-------------|---------------|---|---------------------------|---|
| Approvals Needed | | | F | Open PDF - | Tracking Return Approve |
| Expense Reports Pre-Approvals | | | Q | Tieken Orlando FL 9/19/21 | |
| REPORT OWNER | SUBMIT DATE | AMOUNT SPENT | | | |
| Tieken, Patricia Tieken Orlando FL 9/19/21 GA0023824139 | 08/20/2021 | 725.00 USD | ~ | Report Owner | Patricia Tieken 197607 - Travel Buyer |
| | | | | Submit Date | 08/20/2021 |
| | | | | Expense Report ID | QA0023624139 |
| | | | | Business Purpose | Attending the CBA Conference to learn how ZYX Software works for the department. |

Review the Expense Report and if changes or additions are needed, then click Return.

• *Tip:* All Expense Reports <u>must</u> be Returned if a change or addition is needed. The traveler may only edit an Expense Report created by a delegate, after it is returned.

| Open PDF - | Tracking Return Approve |
|---------------------------|---|
| Tieken Orlando FL 9/19/21 | 1 |
| Report Owner | Patricia Tieken |
| Submit Date | 08/20/2021 |
| Expense Report ID | QA0023624139 |
| Business Purpose | Attending the CBA Conference to learn how ZYX Software works for the department. |

When returning an Expense Report, a comment is required. Enter a comment to document why the Expense Report is returned. 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 funding amount entered, etc.

After the comment is entered, click Return.

• *Tip:* Comments are visible to anyone accessing the report. Once a comment is posted, it cannot be deleted.

| Return Comment | | |
|--|--------|--|
| The dates of travel are incorrect. Please edit the dates to reflect the travel period. | | |
| Cancel | Return | |



Important:

You and the delegate will receive an email notification that the Expense Report was returned. You or the delegate may make the necessary adjustments to the Expense Report, and resubmit it, by logging in to Chrome River.

Regardless of who makes the change, traveler or delegate, the traveler still <u>must</u> approve the amended Expense Report (through email or through Chrome River). For guidance on what the traveler needs to do when an Expense Report is returned, contact Accounts Payable.