



**SOUTH TEXAS
COLLEGE**

Chrome River Travel

Training Manual – Pre-Approval

Business Office

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Pre-Approval - Trips

(Authorizations to travel for Trips)

Every STC approved trip requires a Travel Authorization to be on file with the Travel office. Please refer to Travel Guidelines for deadlines and best practices on submission of travel.

NOTE: \$0 dollar trips (no expenses will be incurred) require paper documents to be filed with the Travel Office.

NOTE: Registration only expenses, which include online webinars or conferences, (no other expenses such as mileage/per diem) require a purchase requisition through the purchase order system with Purchasing.

ChromeRiver uses Report Types which will distinguish who is traveling and will guide the approval routing of your report.

Report Types can be:

- A. Employee Travel
- B. Non-Student Club Travel
- C. Student Club Travel
- D. Student Employee Grant Travel

Travel Types further identify what kind of travel the trip is for. Travel types can be:

- In District Mileage (DO NOT select for trips)
- In State
- International
- Out of State

For ChromeRiver, allocations refer to the Banner Fund-Organization-Program that will fund the trip. Employees have access to all FOAPs and it's very important to make sure the correct allocation is selected. In the Search for Allocation box, you can start typing an organization name or actual numbers and the system will start to display funding that matches what is being entered. Once this is selected the pre-approval can be saved and once submitted, routing will be based on the report type, travel type and FOAP entered. When approving a pre-approval, it is also crucial that the financial manager catch and return pre-approvals that should not be funded from their FOAP. Responsibility on entering and approving the correct FOAP is on the traveler and financial manager.

Create a Pre-Approval - Trips

Previously: Travel Authorization (Trips)

Log into Chrome River via Jagnet. Pre-approvals allow you to obtain permission to travel on behalf of the college and to allow pre-authorization for an expense before it is incurred.

The screenshot shows the Chrome River dashboard. On the left is a navigation menu with 'EXPENSES' and 'PRE-APPROVAL' sections. The 'EXPENSES' section shows 0 Draft, 0 Returned, and 3 Submitted (Last 90 Days). The 'PRE-APPROVAL' section shows 0 Draft, 0 Returned, and 5 Submitted (Last 90 Days). The right-hand area displays the South Texas College logo, contact information for expense reimbursement, and notices including 'Per Diem Rules' and 'Mobile device access'.

Click the +New button then click New Pre-Approval Report from the drop-down list.

This screenshot shows the same Chrome River dashboard, but with the '+ New' button in the top right corner clicked. A dropdown menu is visible, showing two options: 'New Expense Report' and 'New Pre-Approval Report'. Blue arrows point to these options. The rest of the dashboard, including the navigation menu and the right-hand content area, remains the same.

The system will take you to this screen. Start entering your pre-approval information. Requirements are below the screen shot.

**If your department requires Dean approval
Select Yes here.**

Enter the Report Name (first letter of traveler's first name (underscore) full last name (underscore) City (space) State (underscore) start travel date (example: J_Smith_Austin TX_031020).

Enter the start date = **use the departure date on the Travel Agency airfare quote or if driving, the date you are leaving the valley or campus.**

Enter the end date = **use the arrival date on the Travel Agency airfare quote or if driving, the date you arrive to the valley or campus.**

The Number of Days will populate on its own because it is determined by the start and end dates.
The Pay Me In should always be in USD-US Dollars.

The Business Purpose section will be the 3 justification questions with answers. *****Note: This field has a violation (hard stop) which requires you to enter more than 25 characters before you can proceed.**

The questions are as follows:

a. What is the purpose of the travel? b. Why is the travel necessary? c. How does the travel benefit STC?

*****Please note that the questions are also underneath the Business Purpose box.**

The Travel Justification is optional because you already provided the questions in the business purpose box.

Enter the Cash Advance Amount which is the 80% per diem. The 80% calculation of the per diem will need to be calculated by the end user. *****Note: The system is automatically set up to calculate the per diem using the current GSA rates using the city and state you have entered. The cash advance will show up on your e-wallet once the pre-approval is fully approved.**

In this example I am using a cash advance of \$125.68.

Select the Report Type from the drop-down list.

The options are as follows:

- a.) Employee Travel = Any travel that is being paid for by a fund that does not start with 2, 3, or 8.
- b.) Non-Student Club Travel = Any travel that is being paid with a fund code that begins with a 3.
- c.) Student Club Travel = Any travel that is being paid with a fund code that begins with an 8.
- d.) Student Employee Grant Travel= Any travel that is being paid with a fund code that begins with a 2.

Select the Travel Type

- a.) In District Mileage
- b.) In State
- c.) International
- d.) Out of State

Answer the question "Is personal time included in this trip?" Yes or No

Answer the question "Is Dean approval required for this trip?" Yes or No.

*****Note: If your division does not report to a dean always select no. If you do select a dean you must select the correct one because the system will take any dean on the drop-down menu regardless of whether they belong to your department or not.**

Traveler ID will be populated on its own and it will be the A# of the traveler.

Now enter the allocation/FOAPL you will be using to pay for the travel.

*****Note: Click within the box and enter the organization code. When the FOAPL comes up click on it so that it will populate into the box. This system will allow multiple allocations but you will need to split it between the FOAPL's.**

This first section of required information is to complete the Report Header for pre-approvals. The next steps will be to enter the pre-approval authorization expenses. *****Note: You do not attach anything at this stage.** The end result should look like this screen shot. Once you are sure everything is correct click Save.

The screenshot displays the Chrome River Pre-Approvals interface for Patricia Jackson. The left sidebar shows a list of expenses with their estimated amounts. The main form on the right contains the following fields:

- Report Name: P_Jackson_Austin TX_061420
- Start Date: 06/14/2020
- End Date: 06/17/2020
- Number of Days: 4
- Pay Me In: USD - US Dollars
- Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV
- Report Type: Employee Travel
- Travel Type: In State
- Is personal time included in this trip?: No
- Is Dean approval required for this trip?: No
- TravelerID: A00136468
- Allocation: 110000-410013-6300 General Funds Business Office, Bus & Fiscal Management

A blue arrow points to the 'Allocation' field, and another blue arrow points to the 'Save' button in the top right corner.

EXPENSE	ESTIMATED
Conference / Seminar	500.00 USD
Hotel	300.62 USD
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Professional Membership Dues	125.00 USD
Meals - Per Diem	61.00 USD
Car Rental	110.00 USD

PA Report ID: 010000431869
Total Estimated Amount: 1,767.42 USD
Submit

Notice the + sign Add Allocation field. Here is where you can enter multiple FOAPL's if two departments are paying for a traveler's travel expenses. The system allows split of expenses by percentage or amount is manually entered if needed.

Pre-Approval expense – Per Diem

The system will automatically take you to this screen once you save the report. Here is where you are going to enter the pre-approval authorization expenses (pre-trip). *****Note: Do not hit the green submit button until you have entered all the pre-approval expenses.** Click on Meals and Entertainment which is for per diem.

The screenshot shows the Chrome River interface for a pre-approval report titled "P_Jackson_Austin TX_061420". The left sidebar contains a table with columns "EXPENSE" and "ESTIMATED". The main area is titled "Add Pre-Approval Types" and displays a grid of buttons: AIR TRAVEL, GROUND TRANSPORTATION, HOTEL, MEALS / ENTERTAINMENT, REGISTRATION, and MISCELLANEOUS / OTHER. A blue arrow points to the "MEALS / ENTERTAINMENT" button. At the bottom, there is a "Submit" button and a "Total Estimated Amount" of 0.00 USD.

The system will populate a second set of mosaics. Select the Meals – Per Diem Wizard.

This screenshot shows the same Chrome River interface, but with a second row of buttons below the first row. The buttons in the second row are: MEALS - PER DIEM WIZARD, MEALS - PER DIEM, BUSINESS MEALS, and an empty box. A blue arrow points to the "MEALS - PER DIEM WIZARD" button. The rest of the interface, including the sidebar and the "Submit" button, remains the same.

The system will take you to this screen.

CHROME RIVER

+ New Patricia Jackson

Per Diem Wizard

Start Date: 06/14/2020 00:00

End Date: 06/17/2020 23:59

Days: 0

Description: Add Description

Location: Search for Location

Paid by STC: -- Select --

Add Entries Cancel Add to Report

The time is in military time so make sure to select the proper time.

Enter the start date = ***the departure date and time on the Travel Agency airfare quote or if driving, the date and time you are leaving the valley or campus.***

Enter the end date = ***the arrival date and time on the Travel Agency airfare quote or if driving, the time of arrival to the valley or campus.***

The days will automatically populate using the start and end date.

The description should have the A# of the traveler and the traveler name

The location is the city and state of the destination you are traveling to. Once you start entering the city it will populate a drop-down list. Make sure to select the correct city and state. On Paid by STC select Yes. If you are sure the city and state are correct click "Add Entries"

CHROME RIVER

+ New Patricia Jackson

Per Diem Wizard

Start Date: 06/14/2020 09:30

End Date: 06/17/2020 20:00

Days: 4

Description: A00136468 Patricia A. Jackson

Location: Austin-Travis County, Texas (TX), United States

Paid by STC: Yes

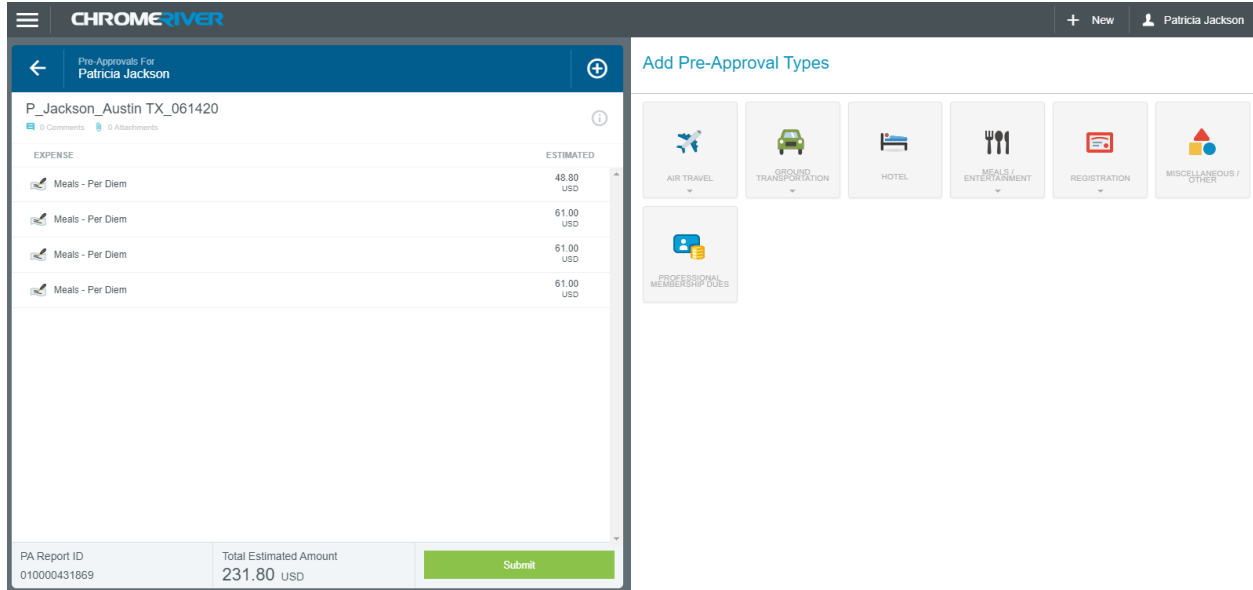
Add Entries Cancel Add to Report

The system will then take you to this screen and if everything is correct click Add to Report

If you click on any day of the per diem it will show you what meal is **not** providing for that day with a check mark. In the example below on the first day 06/14/20 the breakfast is checked off because the traveler left at 9:30 a.m. so no breakfast money will be allocated.

If you click the Next button it will show you each day of the per diem without leaving this screen.

The system will display your entries on the left-hand side of your screen. Here you will add up each per diem entry and double check that you calculated the 80% cash advance amount correctly. In this example the 100% per diem amount is \$231.80. 80% of that is \$185.44. I entered 80% per diem on my “header page” as \$125.68. How do I correct it?

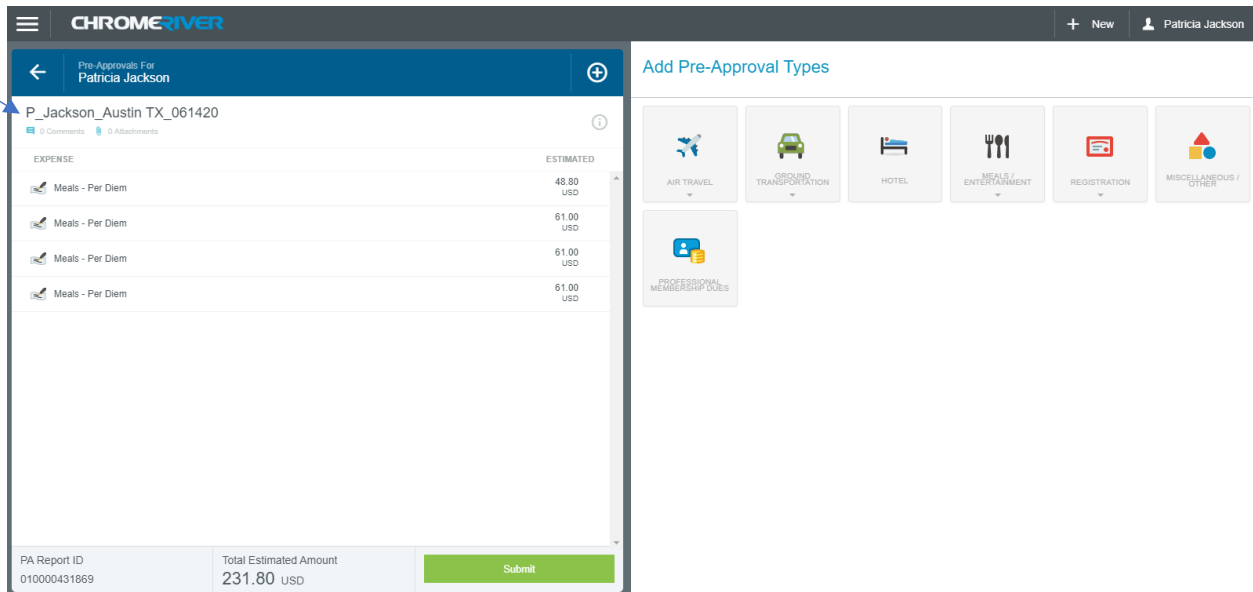


The screenshot shows the 'Pre-Approval For Patricia Jackson' screen. The left panel displays a list of expenses under the header 'P_Jackson_Austin TX_061420'. The table has two columns: 'EXPENSE' and 'ESTIMATED'. The first entry is 'Meals - Per Diem' with an estimated amount of 48.80 USD. The next three entries are also 'Meals - Per Diem' with estimated amounts of 61.00 USD each. A blue arrow points to the first 'Meals - Per Diem' entry. The right panel, titled 'Add Pre-Approval Types', shows icons for AIR TRAVEL, GROUND TRANSPORTATION, HOTEL, MEALS / ENTERTAINMENT, REGISTRATION, and MISCELLANEOUS / OTHER. At the bottom, the 'PA Report ID' is 010000431869, the 'Total Estimated Amount' is 231.80 USD, and there is a green 'Submit' button.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869
Total Estimated Amount: 231.80 USD
Submit

I am going to click on the report header name.

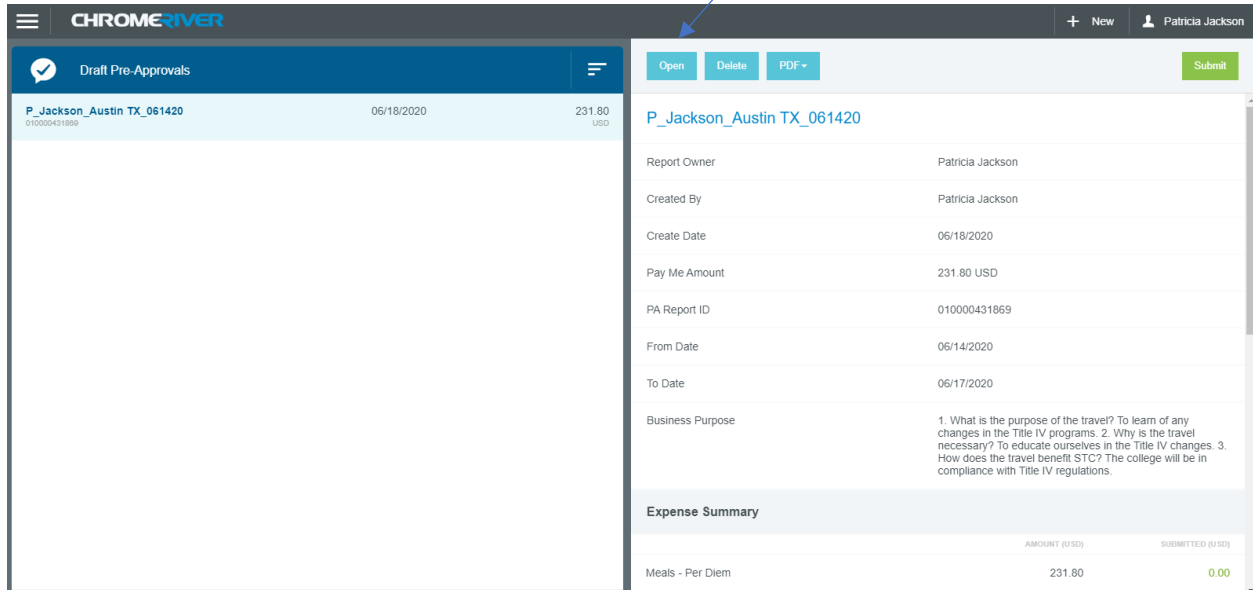


This screenshot is identical to the one above, but a blue arrow points to the report header name 'P_Jackson_Austin TX_061420' in the left panel. The rest of the interface, including the expense table and the 'Add Pre-Approval Types' section, remains the same.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869
Total Estimated Amount: 231.80 USD
Submit

Click Open



CHROME RIVER

Draft Pre-Approvals

Report Name	Create Date	Amount
P_Jackson_Austin TX_061420 010000431869	06/18/2020	231.80 USD

P_Jackson_Austin TX_061420

Report Owner: Patricia Jackson

Created By: Patricia Jackson

Create Date: 06/18/2020

Pay Me Amount: 231.80 USD

PA Report ID: 010000431869

From Date: 06/14/2020

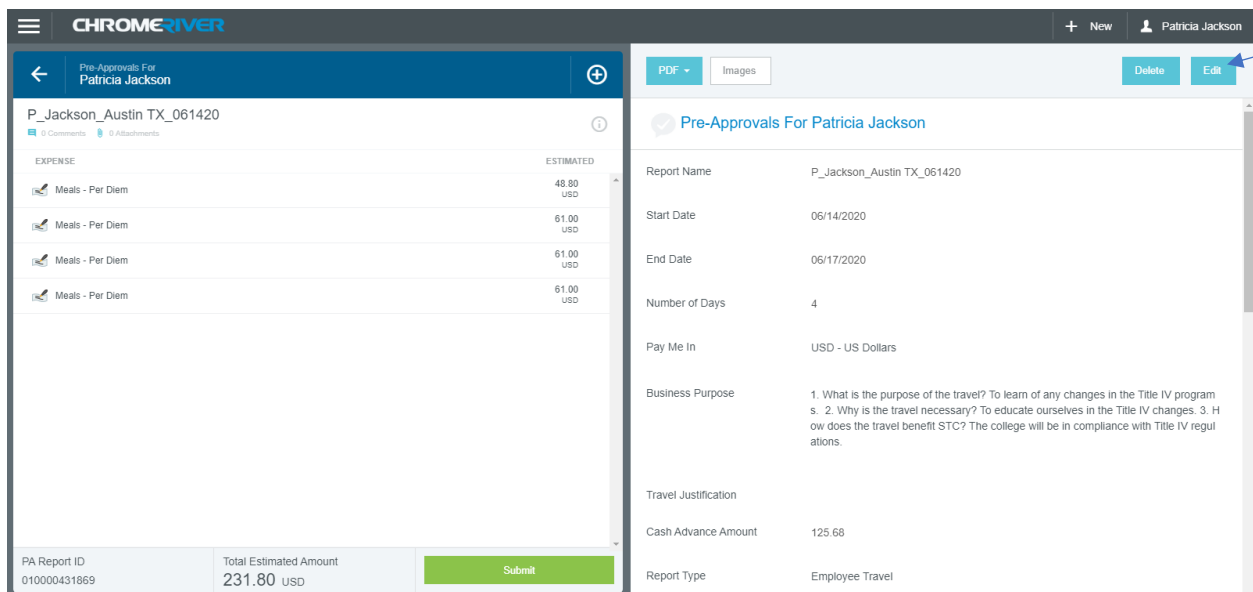
To Date: 06/17/2020

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Expense Summary

	AMOUNT (USD)	SUBMITTED (USD)
Meals - Per Diem	231.80	0.00

Now click Edit and this will open up your header page.



CHROME RIVER

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

0 Comments 0 Attachments

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869

Total Estimated Amount: 231.80 USD

Submit

Pre-Approvals For Patricia Jackson

Report Name: P_Jackson_Austin TX_061420

Start Date: 06/14/2020

End Date: 06/17/2020

Number of Days: 4

Pay Me In: USD - US Dollars

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Travel Justification:

Cash Advance Amount: 125.68

Report Type: Employee Travel

Scroll down to the cash advance amount and change it to \$185.44

CHROMERIVER + New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869 Total Estimated Amount: 231.80 USD **Submit**

Pre-Approvals For Patricia Jackson

Report Name: P_Jackson_Austin TX_061420

Start Date: 06/14/2020

End Date: 06/17/2020

Number of Days: 4

Pay Me In: USD - US Dollars

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Please include the following elements in the Business Purpose field above, a) What is the purpose of the travel?, b) Why is the travel necessary and c) How does the travel benefit STC?

Travel Justification: Optional

Cash Advance Amount: 185.44

Click Save

CHROMERIVER + New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869 Total Estimated Amount: 231.80 USD **Submit**

Pre-Approvals For Patricia Jackson

Report Name: P_Jackson_Austin TX_061420

Start Date: 06/14/2020

End Date: 06/17/2020

Number of Days: 4

Pay Me In: USD - US Dollars

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

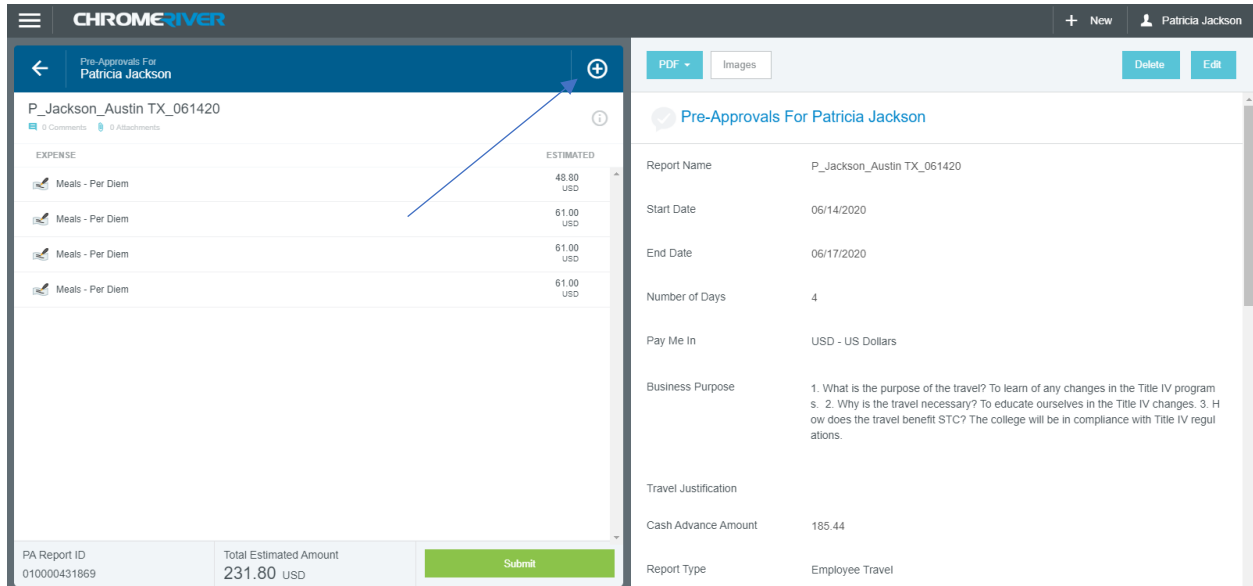
Please include the following elements in the Business Purpose field above, a) What is the purpose of the travel?, b) Why is the travel necessary and c) How does the travel benefit STC?

Travel Justification: Optional

Cash Advance Amount: 185.44

Save

The cash advance is now correct and you can continue to enter other expenses by clicking on the + sign.







CHROME RIVER + New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

0 Comments 0 Attachments

EXPENSE	ESTIMATED
 Meals - Per Diem	48.80 USD
 Meals - Per Diem	61.00 USD
 Meals - Per Diem	61.00 USD
 Meals - Per Diem	61.00 USD

PA Report ID: 010000431869

Total Estimated Amount: 231.80 USD

Submit

PDF Images Delete Edit

Pre-Approvals For Patricia Jackson

Report Name: P_Jackson_Austin TX_061420

Start Date: 06/14/2020

End Date: 06/17/2020

Number of Days: 4

Pay Me In: USD - US Dollars

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Travel Justification

Cash Advance Amount: 185.44

Report Type: Employee Travel

Pre-Approval estimate – Airfare

You are now back at the expense's dashboard. Select the Airfare tile.

CHROME RIVER

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869

Total Estimated Amount: 231.80 USD

Submit

Add Pre-Approval Types

AIR TRAVEL

GROUND TRANSPORTATION

HOTEL

MEALS / ENTERTAINMENT

REGISTRATION

MISCELLANEOUS / OTHER

PROFESSIONAL MEMBERSHIP DUES

This will populate a secondary set of mosaics. The only one you should ever select is Airfare. The air wi-fi and baggage fees will be used on the expense report if necessary (post trip). Click Airfare.

CHROME RIVER

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869

Total Estimated Amount: 231.80 USD

Submit

Add Pre-Approval Types

AIR TRAVEL

GROUND TRANSPORTATION

HOTEL

MEALS / ENTERTAINMENT

REGISTRATION

MISCELLANEOUS / OTHER

AIRFARE

AIR WIFI

BAGGAGE FEE

PROFESSIONAL MEMBERSHIP DUES

The system will bring you to the expenses screen. Here you will enter the estimated amount of the airfare from the Travel Agency airfare quote. The description should be the vendors A# and vendor

name then select paid by STC Yes or No. ****Note: If you select no because the traveler has paid for his/her own airfare it will not be paid to them until after the trip on the expense report.**

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD

PA Report ID: 010000431869

Total Estimated Amount: 231.80 USD

Submit

If everything looks correct go ahead and click Save. *****Note: You can see on the screen that there is no option to attach a document. You will attach the documents after you enter all the expenses.**

The system will take you back to the expenses dashboard. You will notice that once you save it displays the expense on the left-hand side of your screen.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD

PA Report ID: 010000431869

Total Estimated Amount: 731.80 USD

Submit

Pre-Approval Expense – Mileage for trip

If the traveler chooses to drive instead of fly you will select Ground Transportation. **DO NOT leave airfare quote line in Chrome River expense report if only price example** – it will generate a purchase order and the Purchasing department will send it to the Travel Agency for a flight ticket to be issued. *****Note: an airfare quote will need to be uploaded as comparison on prices. If the airfare quote is less than the mileage calculated by the system the traveler will be paid the airfare quote because that is what would have been more beneficial to the college.**

CHROMERIVER

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD

PA Report ID: 010000431869

Total Estimated Amount: 731.80 USD

Submit

Add Pre-Approval Types

AIR TRAVEL

GROUND TRANSPORTATION

HOTEL

MEALS / ENTERTAINMENT

REGISTRATION

MISCELLANEOUS / OTHER

PROFESSIONAL MEMBERSHIP DUES

Select the mileage tile

CHROMERIVER

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD

PA Report ID: 010000431869

Total Estimated Amount: 731.80 USD

Submit

Add Pre-Approval Types

AIR TRAVEL

GROUND TRANSPORTATION

HOTEL

MEALS / ENTERTAINMENT

REGISTRATION

MISCELLANEOUS / OTHER

CAR RENTAL

CAR RENTAL FUEL

MILEAGE

PARKING

PUBLIC TRANSIT / TRAIN / RAIL / OTHER

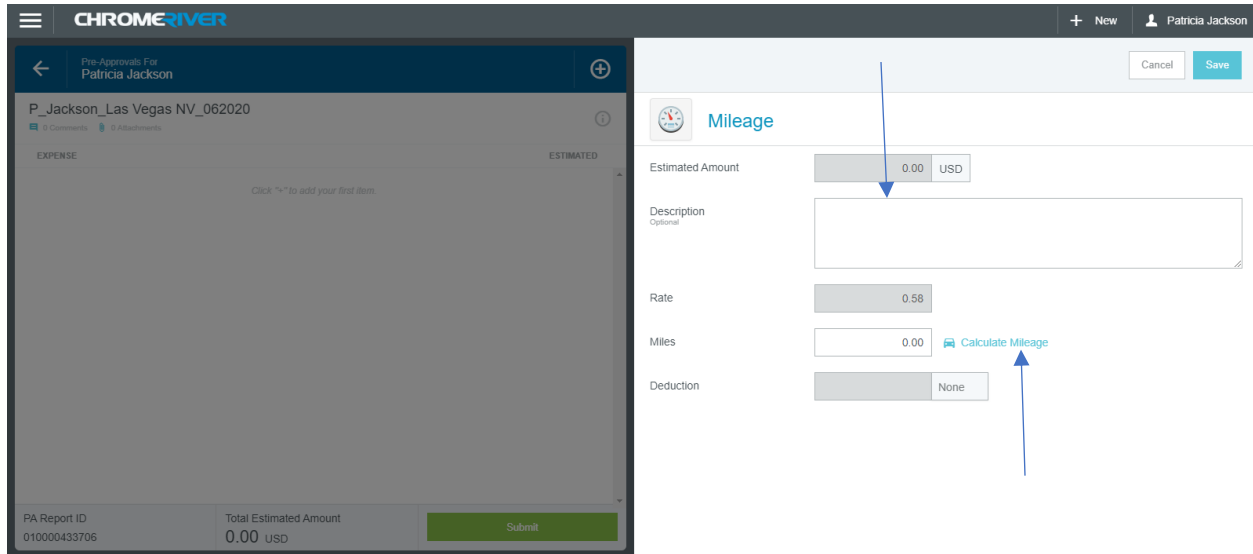
TAXI / CAR SERVICE / UBER / LYFT

TOLLS

PROFESSIONAL MEMBERSHIP DUES

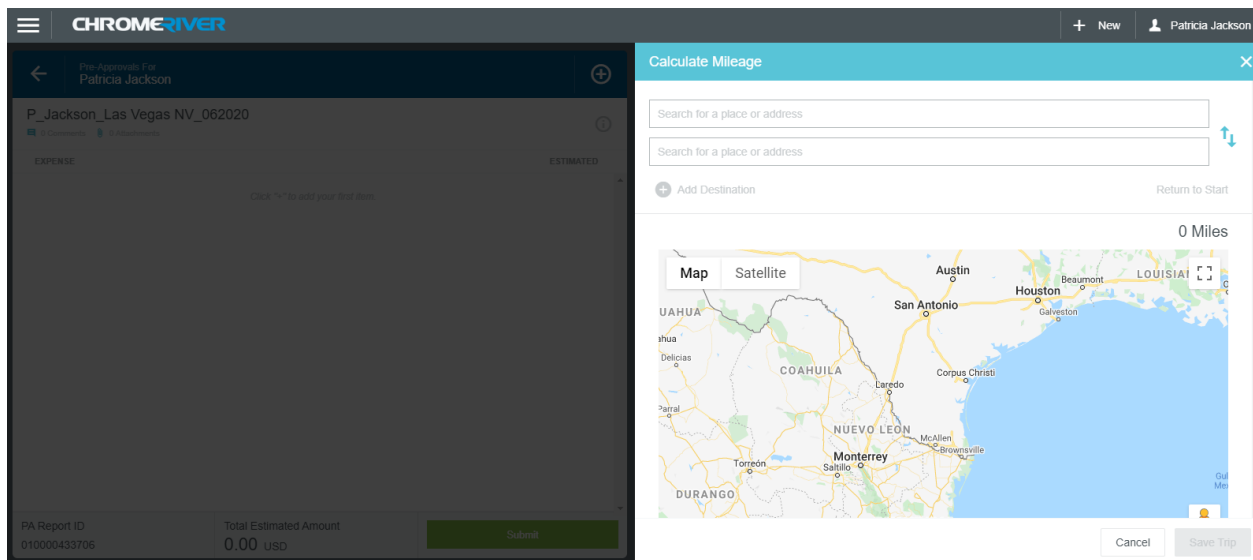
The system will bring you to this screen.

Click calculate miles



The screenshot shows the Chrome River interface. On the left is a sidebar with a menu icon, the Chrome River logo, and a 'Pre-Approvals For Patricia Jackson' section. Below this is a list of items, including 'P_Jackson_Las Vegas NV_062020'. The main area on the right is the 'Mileage' form. It has a 'Cancel' button and a 'Save' button at the top right. The form fields are: 'Estimated Amount' (0.00 USD), 'Description' (Optional), 'Rate' (0.58), 'Miles' (0.00), and 'Deduction' (None). A blue arrow points to the 'Calculate Mileage' button, which is located next to the 'Miles' field.

The system will take you to the the google maps option to enter the departure address and the arrival address



The screenshot shows the Chrome River interface with the 'Calculate Mileage' form open. The form has a title bar with 'Calculate Mileage' and a close button. It contains two search bars for 'Search for a place or address', an 'Add Destination' button, and a 'Return to Start' button. Below the search bars is a map of Texas and surrounding areas, showing cities like Austin, San Antonio, Houston, and Monterrey. The map is labeled '0 Miles'. At the bottom right of the map area are 'Cancel' and 'Save Trip' buttons.

A Round trip calculation is required: In this example I am going to use leaving the Pecan Campus and arriving at my hotel.

Then I am going to click add a destination or return to start to create a roundtrip estimate to return to Pecan Campus. If the return is to a different location then click a destination and click “save trip”.

CHROME RIVER

Calculate Mileage

South Texas College - Pecan Campus, Pecan Boulevard, McAllen, TX, USA

Hilton San Antonio Airport, Northwest Loop 410, San Antonio, TX, USA

South Texas College - Pecan Campus, Pecan Boulevard, McAllen, TX, USA

+ Add Destination

Return to Start

500.72 Miles

Map Satellite

San Antonio Houston

Cancel Save Trip

The system will take me back to the expenses screen where the calculations have been made for me and the description has been pre-filled with the trip details.

CHROME RIVER

Mileage

Estimated Amount 290.42 USD

Description Optional

From: South Texas College - Pecan Campus, Pecan Boulevard, McAllen, TX, USA

To: Hilton San Antonio Airport, Northwest Loop 410, San Antonio, TX, USA

To: South Texas College - Pecan Campus, Pecan Boulevard, McAllen, TX, USA

Rate 0.58

Miles 500.72 Calculate Mileage

Deduction None

Cancel Save

Click Save

The screenshot shows the Chrome River interface for entering a mileage expense. The top navigation bar includes the Chrome River logo, a '+ New' button, and the user name 'Patricia Jackson'. The left sidebar shows a list of expenses, with the current one being 'P_Jackson_Las Vegas NV_062020'. The main form area is titled 'Mileage' and contains the following fields:

- Estimated Amount:** 290.42 USD
- Description (Optional):** From: South Texas College - Pecan Campus, Pecan Boulevard, McAllen, TX, USA
To: Hilton San Antonio Airport, Northwest Loop 410, San Antonio, TX, USA
To: South Texas College - Pecan Campus, Pecan Boulevard, McAllen, TX, USA
- Rate:** 0.58
- Miles:** 500.72 (with a 'Calculate Mileage' button)
- Deduction:** None

At the bottom of the form, there is a 'Submit' button. A blue arrow points to the 'Save' button in the top right corner of the form.

This action will now display the expense on the left-hand side of your screen with your other expenses.

Pre-Approval estimate – Ground Transportation – Car Rental

Select another expense. Let's try Ground Transportation (this includes car rental, fuel, mileage, parking,

The screenshot shows the Chrome River Pre-Approval interface. On the left, a table lists expenses for Patricia Jackson's report (P_Jackson_Austin TX_061420). The table has two columns: EXPENSE and ESTIMATED. The expenses listed are four Meals - Per Diem (each \$61.00 USD) and one Airfare (\$500.00 USD). The total estimated amount is 731.80 USD. On the right, under the heading "Add Pre-Approval Types", there is a grid of mosaics. A blue arrow points to the "GROUND TRANSPORTATION" mosaic, which features a green car icon.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 731.80 USD | Submit

The system will display a second set of mosaics. *****Note: The only ones that you can use on the pre-approval is car rental and mileage.** All others will be used on the expense report if necessary.

Select the car rental mosaic.

This screenshot shows the same Chrome River Pre-Approval interface, but with a second set of mosaics displayed below the first set. A blue arrow points to the "CAR RENTAL" mosaic, which features a green car icon. The "CAR RENTAL FUEL" mosaic, featuring a red gas pump icon, is also visible. Other mosaics in the second set include MILEAGE (gas pump icon), PARKING (P sign icon), PUBLIC TRANSIT / TRAIN / RAIL / OTHER (train icon), and TAXI / CAR SERVICE / UBER / LYFT (taxi icon). The first set of mosaics remains visible above.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 731.80 USD | Submit

The system will take you to this screen. The estimated amount will be the amount on the car rental quote/reservation. The description will be the A# and the vendor's name. Paid by STC select Yes or No
*****Note: If you select Yes to be paid by STC it will require a requisition number. The system will not let you continue unless that required field has a number.**

If you are sure everything is correct click Save

CHROME RIVER

Pre-Approval For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD

PA Report ID: 010000431869

Total Estimated Amount: 731.80 USD

Submit

Car Rental

Estimated Amount: 110.00 USD

Description: A00464964 Enterprise Car Rental

Paid by STC: Yes

Please provide REQ/PO number for car rental: R0033181

Cancel Save

Pre-Approval Expense – Hotel/Lodging

The system will take you back to the expenses screen where you can add another expense. The expenses continue to be added to the left of your screen. Click on the Hotel tile.

The screenshot shows the Chrome River interface for Pre-Approval. On the left, a list of expenses is shown for Patricia Jackson's report (P_Jackson_Austin TX_061420). The expenses include four meals at \$61.00 each, airfare at \$500.00, and car rental at \$110.00. The total estimated amount is \$841.80. On the right, under 'Add Pre-Approval Types', there are several category tiles: AIR TRAVEL, GROUND TRANSPORTATION, HOTEL, MEALS / ENTERTAINMENT, REGISTRATION, and MISCELLANEOUS / OTHER. A blue arrow points to the 'HOTEL' tile.

The estimated amount will come from the hotel reservation. The description will be the vendors A# and vendor name, hotel tax percentages and amounts, and if the hotel provides breakfast. *****Note: You must call the hotel and ask them about all the taxes they charge on the room and if they have any additional fees like resort fees, county taxes, or tourism fee. You will need to ask them for the breakdown of each amount charged and percentage of each tax amount. This should equal the total amount on the reservation. Do not forget to request the W-9 once you have them on the line.**

Paid by STC select Yes or No. If you select yes Vendor and Vendor City will appear. Vendor – **Provide A# if it is a vendor in Banner with the name of the hotel. If a new vendor then put New Vendor and the name of the hotel.** Vendor City is the city the traveler is staying in. If you are sure everything is correct, click Save

This screenshot shows the 'Hotel' form in the Chrome River system. The 'Estimated Amount' is set to 300.62 USD. The 'Description' field contains detailed information about the hotel reservation: 'A00370286 Embassy Suites Austin Arboretum. Room rate is \$250.00, hotel taxes are 8.50% or \$21.25 for city taxes, 6% or \$15.00 for state taxes, 1.75% or \$4.37 for county taxes, 10% or \$25.00 for resort fees. Trip is in state so state taxes do not apply. Fees that apply are'. The 'Paid by STC' dropdown is set to 'Yes'. The 'Vendor' field is populated with 'A00370286 Embassy Suites Austin Arboretum' and the 'Vendor City' is 'Austin'. A blue arrow points to the 'Save' button in the top right corner.

The system will take you back to the expenses screen.

CHROME RIVER

+ New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE

Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD

ESTIMATED

Total Estimated Amount
1,142.42 USD

PA Report ID
010000431869

Submit

Add Pre-Approval Types

AIR TRAVEL

GROUND TRANSPORTATION

HOTEL

MEALS / ENTERTAINMENT

REGISTRATION

MISCELLANEOUS / OTHER

PROFESSIONAL MEMBERSHIP DUES

Pre-Approval Expense – Registration

Click the Registration button.

CHROME RIVER

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD

PA Report ID: 010000431869

Total Estimated Amount: 1,142.42 USD

Submit

Add Pre-Approval Types

AIR TRAVEL

GROUND TRANSPORTATION

HOTEL

MEALS / ENTERTAINMENT

REGISTRATION

MISCELLANEOUS / OTHER

PROFESSIONAL MEMBERSHIP DUES

The system will populate a second set of mosaics which include either Conference/Seminar or Training/Education. Make sure to pick the appropriate one.

CHROME RIVER

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD

PA Report ID: 010000431869

Total Estimated Amount: 1,142.42 USD

Submit

Add Pre-Approval Types

AIR TRAVEL

GROUND TRANSPORTATION

HOTEL

MEALS / ENTERTAINMENT

REGISTRATION

MISCELLANEOUS / OTHER

CONFERENCE / SEMINAR

TRAINING / EDUCATION

PROFESSIONAL MEMBERSHIP DUES

In this example I am selecting Conference/Seminar.

*****Note: Training/Education pertain to training necessary for your job or job functions.**

Estimated amount will be the cost of the seminar. The description will be the vendors A# and vendor name plus any notes that may be needed. IE: is there an early bird registration deadline or a late fee if not paid by a certain date. Paid by STC select Yes or No. If the registration fee is over \$1,500.00 an approved STC Promissory Note needs to be uploaded.

*****Note: If an employee is taking a Webinar or attending an STC held event a pre-approval authorization is not required. If a registration fee must be paid it needs to go through a requisition and not the Chrome River system.**

The screenshot shows the Chrome River Pre-Approval interface. On the left, a list of expenses is displayed for Patricia Jackson's report (P_Jackson_Austin TX_061420). The expenses include four meals (each \$61.00), airfare (\$500.00), car rental (\$110.00), and a hotel (\$300.62). The total estimated amount is 1,142.42 USD. On the right, the 'Conference / Seminar' form is partially filled out. The estimated amount is 500.00 USD. The description is 'A00461448 Educause Inc. Early Bird registration is due on 05/25/2020 if not registration fee will go up.' The 'Paid by STC' dropdown is set to 'No'.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD

PA Report ID: 010000431869
Total Estimated Amount: 1,142.42 USD

Conference / Seminar Form:
Estimated Amount: 500.00 USD
Description: A00461448 Educause Inc. Early Bird registration is due on 05/25/2020 if not registration fee will go up.
Paid by STC: No

At this point if you click Yes STC will pay, you will get more questions to answer.

Is employee already registered? Answer Yes or No.

Does employee need to login to make payment? Answer Yes or No.

Please provide any contact information to allow us to process the payment (email, phone, etc.) Provide as much information as you can.

Please provide any additional info needed for registration.

Please provide registration deadline = The date the registration fee needs to be paid.

The end product should look like this screen. If you are sure everything is correct click the save button.

This screenshot shows the completed 'Conference / Seminar' form. The 'Paid by STC' dropdown is now set to 'Yes'. Additional questions have been answered: 'Is employee already registered?' is 'Yes', and 'Does employee need to login to make payment?' is 'No'. Contact information is provided: 'susan.watkins@educause.org 512-387-2089'. Additional registration info is 'Pease make payment to Educause Inc. They do not take credit cards'. The registration deadline is set to '05/20/2020'. A blue arrow points to the 'Save' button in the top right corner.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD

PA Report ID: 010000431869
Total Estimated Amount: 1,142.42 USD

Conference / Seminar Form:
Estimated Amount: 500.00 USD
Description: A00461448 Educause Inc. Early Bird registration is due on 05/25/2020 if not registration fee will go up.
Paid by STC: Yes
Is employee already registered?: Yes
Does employee need to login to make payment?: No
Please provide any contact information to allow us to process the payment (email, phone, etc.): susan.watkins@educause.org 512-387-2089
Please provide any additional info needed for registration: Pease make payment to Educause Inc. They do not take credit cards
Please provide deadline for registration: 05/20/2020

Pre-Approval Expense – Membership

This will take you back to the expenses screen. Best practices would be to process Membership prior to conference through a Purchase Order. However, if conference attendance requires membership or if membership will decrease registration amount you may include the membership through Chrome River with Financial Manager approval.

NOTE: Purchase order is still required – please ensure that the online purchase requisition is processed prior to Chrome River entry, paperwork is submitted to both Purchasing and AP, and that the Institutional Membership form is completed. If anything is delayed, Registration and Membership payment might not be able to be completed timely.

Click the Professional Membership Dues.

The screenshot shows the Chrome River Pre-Approval interface for Patricia Jackson. The main panel displays a list of expenses for 'P_Jackson_Austin TX_061420'. The sidebar on the right, titled 'Add Pre-Approval Types', includes icons for Air Travel, Ground Transportation, Hotel, Meals / Entertainment, Registration, and Miscellaneous / Other. A blue arrow points to the 'Professional Membership Dues' icon, which is located below the main expense list.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 1,642.42 USD | Submit

The system will bring you to this next screen:

The screenshot shows the 'Professional Membership Dues' screen in Chrome River. The main panel displays the same list of expenses as the previous screen. The sidebar on the right, titled 'Professional Membership Dues', includes a 'Save' button and a 'Cancel' button. Below the title, there are fields for 'Estimated Amount' (0.00 USD), 'Description' (Optional), and 'Paid by STC' (a dropdown menu).

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 1,642.42 USD | Submit

Enter the membership fees from the membership form. On the Description you will enter the A# for the vendor and the name of the vendor. *****Notes: If we are paying a membership fee you need to upload an approved STC institutional membership form. Also include the online requisition number – Purchasing will require to process PO.**

If the information is correct press Save.

The screenshot displays the CHROME RIVER Pre-Approval interface. The left sidebar shows a list of expenses for Patricia Jackson, including Meals - Per Diem, Airfare, Car Rental, Hotel, and Conference / Seminar. The right panel shows the details for 'Professional Membership Dues'. The 'Estimated Amount' is 125.00 USD. The 'Description' field contains 'A00001234 O'Reilly's Auto'. The 'Paid by STC' dropdown is set to 'Yes'. A blue arrow points to the 'Save' button in the top right corner.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD

PA Report ID: 010000431869 | Total Estimated Amount: 1,642.42 USD | Submit

Professional Membership Dues

Estimated Amount: 125.00 USD

Description: A00001234 O'Reilly's Auto

Paid by STC: Yes

Cancel Save

Uploading Attachments

After you have entered all expenses that need approval for the trip, you should be back at the main screen for the document. Now attachments may be uploaded. The system will bring you back to the expenses screen. Click on the Report Name

CHROME RIVER + New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE ESTIMATED

Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD
Professional Membership Dues	125.00 USD

PA Report ID: 010000431869 Total Estimated Amount: 1,767.42 USD Submit

Add Pre-Approval Types

- AIR TRAVEL
- GROUND TRANSPORTATION
- HOTEL
- MEALS / ENTERTAINMENT
- REGISTRATION
- MISCELLANEOUS / OTHER
- PROFESSIONAL MEMBERSHIP DUES

Click Open

CHROME RIVER + New Patricia Jackson

Submitted Pre-Approvals

P_Jackson_Austin TX_061420 06/18/2020 1,767.42 USD APPROVED

P_Jackson_Austin TX_061420 010000431869 06/18/2020 1,767.42 USD USED / EXPIRED

P_Jackson_Austin TX_062320 010000431049 06/15/2020 1,767.42 USD APPROVED

TEST_P_Jackson_Sedona AZ_061520-061820 010000426224 05/29/2020 560.28 USD PENDING

P_Jackson_Mileage Enc_090119-083120 010000423837 05/21/2020 1,582.24 USD PARTIALLY APPLIED

testtesttesttesttesttesttesttesttesttest 010000423891 05/20/2020 183.00 USD PENDING

TEST_Packson_Indistrictmileage_040120-043020 010000427376 05/13/2020 0.00 USD USED / EXPIRED

TEST_P_Jackson_nonstudentmileage_050120-051020 010000427377 05/13/2020 0.00 USD USED / EXPIRED

Testing cash advance on mileage 03/05/2020 183.24

Open PDF Tracking Expire Duplicate

P_Jackson_Austin TX_061420

Report Owner: Patricia Jackson

Created By: Patricia Jackson

Create Date: 06/18/2020

Pay Me Amount: 1,767.42 USD

PA Report ID: 010000431869

From Date: 06/14/2020

To Date: 06/17/2020

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Prior Approvers

APPROVER	DATE
Giovanni Colin	06/18/2020

If I scroll all the way to the bottom of the screen you will see the upload attachments button

Click the upload attachments and go to the location where you have all the documents for this trip. ***This includes but is not limited to: The most current IRS Version of the W-9 form for any vendors that do not have one on file in Banner or is a new vendor, signed tax exempt form if in state travel, airfare quote, registration form, membership form, institutional membership form, car rental reservation, hotel reservation with amounts of stay, etc. ***Note: Do not upload car insurances or driver's licenses. Those will still go the traveloffice@southtexascollege.edu email.***

The screen will look as follows:

Before saving make sure to review what you have uploaded by clicking on an image. We want one upload with all the documents. If everything is correct click Save.

CHROMERIVER

Pre-Approval For Patricia Jackson

P_Jackson_Austin TX_061420

EXPENSE	ESTIMATED
Meals - Per Diem	48.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD
Professional Membership Dues	125.00 USD

PA Report ID: 010000431869

Total Estimated Amount: 1,767.42 USD

Submit

Comments (0)

Add Comment

Post

Attachments (6)

Drag image here to upload

Upload Attachments

Cancel Save

Pre-approval – Mileage

(Authorizations to travel for In District Mileage)

Every STC approved mileage request requires a Mileage encumbrance request to be on file with the Travel office. Please refer to Travel Guidelines for deadlines and best practices on submission of in district mileage.

Please remember that only authorized South Texas College employees can travel on behalf of the College, all STC employees traveling on college related business must have a valid driver license and vehicle insurance. It is the Financial Manager's responsibility to verify employees are eligible to travel.

Note: *Attachments for Pre-Approvals-Mileage encumbrances are welcome, but not mandatory. They are **required** on the Expense Report (previously Travel Voucher-TR doc).*

See the pages above marked "Uploading Attachments" if you wish to upload attachments to your Pre-Approval – Mileage request.

Report Types can be:

- A. Employee Travel
- B. Non-Student Club Travel (Fund 3)
- C. Student Club Travel (Fund 8) – DO NOT select for mileage
- D. Student Employee Grant Travel (Fund 2)

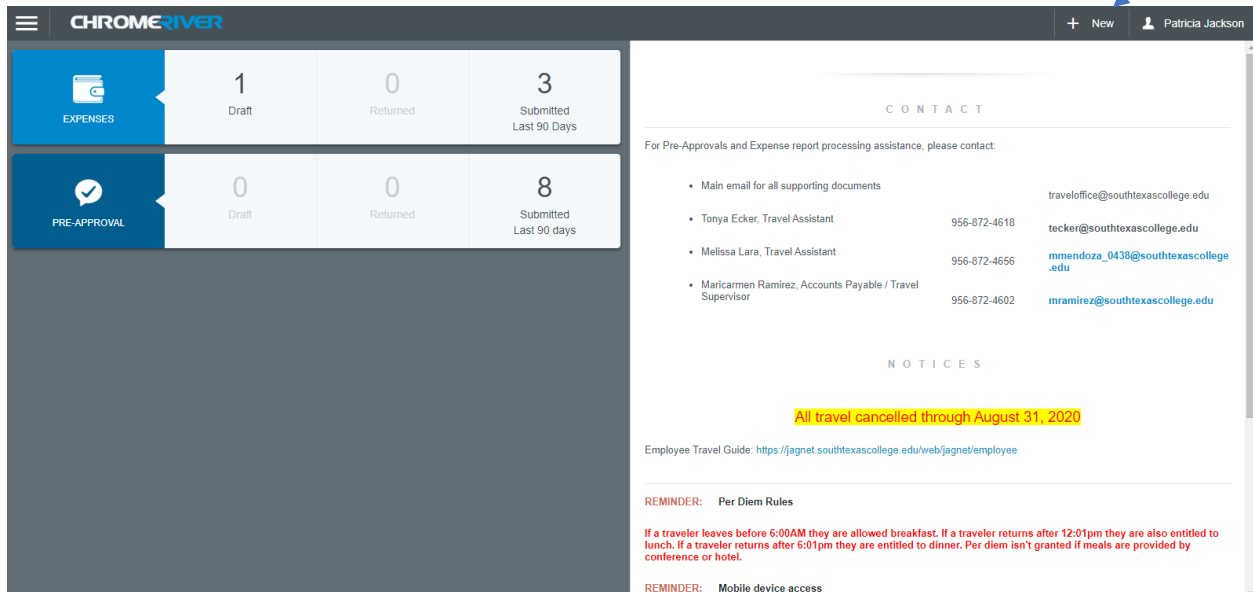
Travel Types further identify what kind of travel the trip is for. Travel types for In District Mileage can ONLY be:

- In District Mileage

Create a Pre-Approval - Mileage

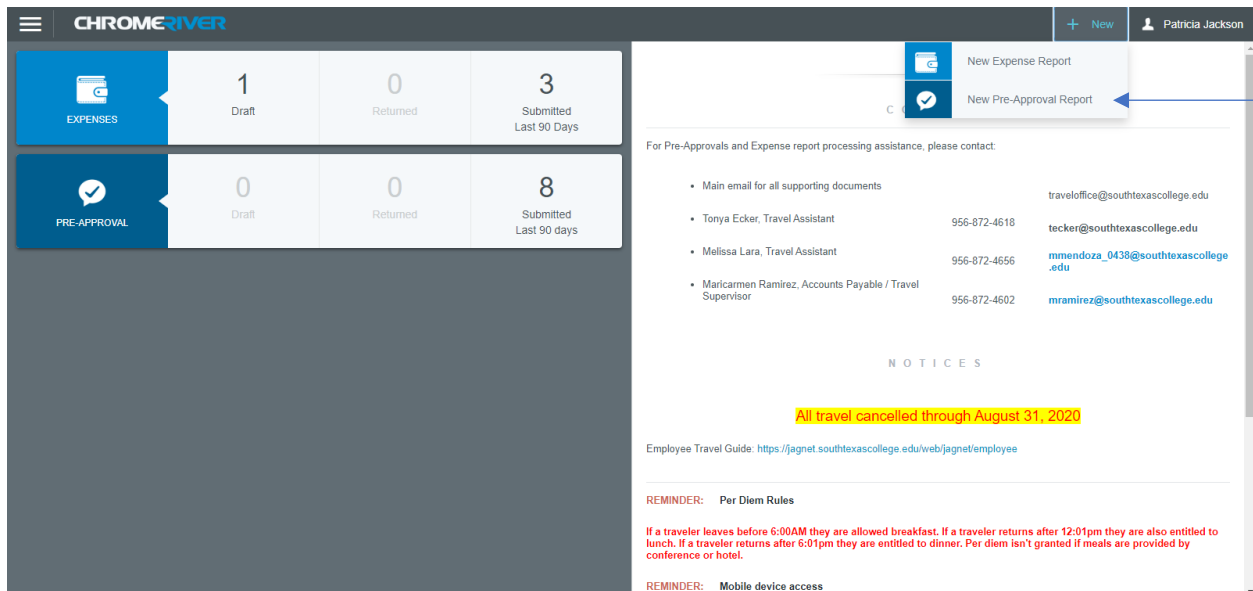
Previously: Travel Authorization (In District Mileage)

Log into Chrome River via Jagnet. Click the +New button.



The screenshot shows the Chrome River interface. On the left, there are two main sections: EXPENSES and PRE-APPROVAL. The EXPENSES section shows 1 Draft, 0 Returned, and 3 Submitted (Last 90 Days). The PRE-APPROVAL section shows 0 Draft, 0 Returned, and 8 Submitted (Last 90 days). On the right, there is a CONTACT section with contact information for travel assistance and a NOTICES section with a yellow highlighted notice: "All travel cancelled through August 31, 2020". A blue arrow points to the "+ New" button in the top right corner of the interface.

A drop-down menu will appear and you will click the New Pre-Approval Report option.



The screenshot shows the Chrome River interface with the "+ New" button clicked, revealing a drop-down menu. The menu has two options: "New Expense Report" and "New Pre-Approval Report". A blue arrow points to the "New Pre-Approval Report" option. The rest of the interface is the same as the previous screenshot, showing the EXPENSES and PRE-APPROVAL sections and the CONTACT/NOTICES information.

The system will take you to this screen. This is to enter your report name header.

You will enter the report name as follows:

Enter the Report Name (first letter of traveler's first name (underscore) full last name (underscore) In District Mileage(underscore) the dates of the entire fiscal year *(example: J_Smith_In District Mileage_090119-083120)*. *****Note: The business purpose has to be more than 25 characters or you will get a warning.**

Enter the start date = the first day of the fiscal year

Enter the end date = the last day of the fiscal year

The Number of Days will populate on its own because it is determined by the start and end dates.
The Pay Me In should always be in USD-US Dollars.

The Business Purpose will be the description of why you are claiming in district mileage *****Note: This field has a violation (hard stop) which requires you to enter more than 25 characters or you cannot proceed.** (IE: Homepage is Pecan but I am teaching at Mid Valley on Tuesdays and Thursdays (See attached teaching schedule)

The Travel Justification is optional because you already have that in the business purpose box.

Cash Advance Amount will always be 0 because we do not give cash advances on in district mileage.

Select the Report Type from the drop-down list.

The options are as follows:

- a.) Employee Travel = Any travel that is being paid for by a fund that does not start with **2, 3, or 8**.
- b.) Non-Student Club Travel = Any travel that is being paid with a fund code that begins with a **3**.
- c.) Student Club Travel = Any travel that is being paid with a fund code that begins with an **8**.
- d.) Student Employee Grant Travel= Any travel that is being paid with a fund code that begins with a **2**.

Select the Travel Type

a.) In District Mileage

Answer the question “Is personal time included in this trip?” Yes or No

Answer the question “Is Dean approval required for this trip?” Yes or No.

*****Note: If your division does not report to a dean always select no.** (For this example, I am going to answer yes to the Dean approval question.)

Traveler ID will be populated on its own and it will be the A# of the traveler.

Now enter the allocation/FOAPL you will be using to pay for the travel.

*****Note: This option has a drop-down menu of all organizations. If you click within the box it will display them. You can also enter an organization code and it will populate the proper allocation/FOAPL. You will have to click on the allocation so that it moves up to the box. This system will allow for multiple allocations but you will need to split it between the FOAPL's.**

All these steps are only to enter the “report header” for the pre-approval. The next steps will be to enter the pre-approval expenses. *****Note: You do not attach anything at this stage.** We are just creating the report header.

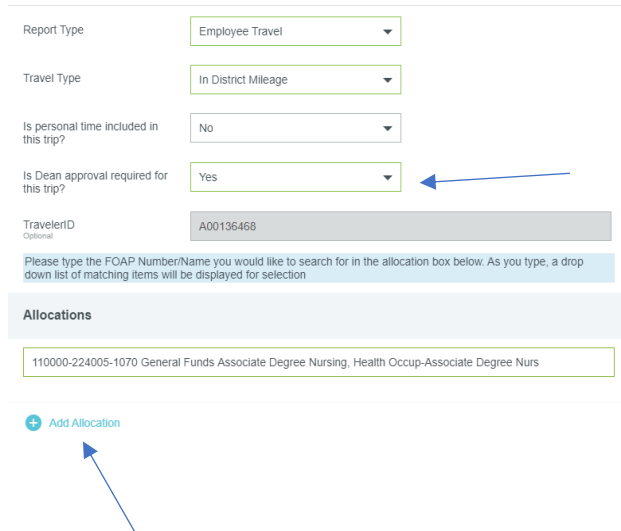
Your report header information should look as follows:

The screenshot displays the Chrome River Pre-Approvals interface for Patricia Jackson. The form is titled "Pre-Approvals For Patricia Jackson" and includes a "Save" button in the top right corner, indicated by a blue arrow. The form fields are as follows:

- Report Name: P_Jackson_In District Mileage_090119-083120
- Start Date: 09/01/2019
- End Date: 08/31/2020
- Number of Days: 366
- Pay Me In: USD - US Dollars
- Business Purpose: Homebase is Pecan but I am teaching at MidValley on Tuesdays and Thursdays. (See attached teaching schedule)
- Travel Justification: (Optional)
- Cash Advance Amount: 0 (Optional)

The form also includes a "Submit" button at the bottom right and a "Total Estimated Amount" of 0.00 USD.

As you can see below – as you scroll down you will see more information to input, including “Dean approval”. **NOTE:** *The only Division that requires Dean approval is Academic Affairs, their deans are the only ones uploaded at this time.* In this example I have chosen “Yes” for the Dean approval. Also notice that I used an NAH organization in order to show you the Dean approval function. Click Save.



The screenshot shows a web form for reporting travel. It includes several dropdown menus and text input fields. Annotations with blue arrows point to specific fields: one points to the 'Is Dean approval required for this trip?' dropdown, and another points to the '+ Add Allocation' button. The form is divided into sections by horizontal lines.

Report Type	Employee Travel
Travel Type	In District Mileage
Is personal time included in this trip?	No
Is Dean approval required for this trip?	Yes
TravelerID <small>Optional</small>	A00136468

Please type the FOAP Number/Name you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection.

Allocations

110000-224005-1070 General Funds Associate Degree Nursing, Health Occup-Associate Degree Nurs

+ Add Allocation

Notice the + sign Add Allocation field. Here is where you can enter multiple FOAP's if two departments are paying for a traveler's mileage expenses. The system will split all expenses by the percentages that you enter for the split.

Entering Estimated Mileage

Once you save the system will take you to this screen:

Click Ground Transportation

CHROME RIVER

Pre-Approval For Patricia Jackson

P_Jackson_In District Mileage_090119-083120

EXPENSE ESTIMATED

Click "*" to add your first item.

PA Report ID: 010000431947

Total Estimated Amount: 0.00 USD

Submit

Add Pre-Approval Types

AIR TRAVEL

GROUND TRANSPORTATION

HOTEL

MEALS / ENTERTAINMENT

REGISTRATION

MISCELLANEOUS / OTHER

PROFESSIONAL MEMBERSHIP FEES

The system will bring you to this screen:

Select Mileage.

CHROME RIVER

Pre-Approval For Patricia Jackson

P_Jackson_In District Mileage_090119-083120

EXPENSE ESTIMATED

Click "*" to add your first item.

PA Report ID: 010000432535

Total Estimated Amount: 0.00 USD

Submit

Add Pre-Approval Types

AIR TRAVEL

GROUND TRANSPORTATION

HOTEL

MEALS / ENTERTAINMENT

REGISTRATION

MISCELLANEOUS / OTHER

CAR RENTAL

CAR RENTAL FUEL

MILEAGE

PARKING

PUBLIC TRANSIT / TRAIN / RAIL / OTHER

TAXI / CAR SERVICE / UBER / LYFT

TOLLS

PROFESSIONAL MEMBERSHIP FEES

For testing purposes, we will use an example for staff who submit mileage requests at the beginning of the fiscal year. Here you will enter the estimated number of miles the traveler will travel to and from Pecan to Mid-Valley. Please follow travel guidelines for submitting mileage encumbrance requests (at beginning of fiscal year, or at beginning of each semester).

The screenshot shows the Chrome River interface for a Mileage request. The left pane displays the report title 'PJackson_In District Mileage_090119-083120' and a table with columns 'EXPENSE' and 'ESTIMATED'. The right pane contains the form fields: 'Estimated Amount' (0.00 USD), 'Description' (empty), 'Rate' (0.58), 'Miles' (0.00), and 'Deduction' (None). A 'Calculate Mileage' button is next to the Miles field. At the bottom, the PA Report ID is 010000432535 and the Total Estimated Amount is 0.00 USD.

In this example I am going to add my description and estimated number of miles. I have selected 3,000 miles for the entire fiscal year. All my gray fields will populate on their own.

The screenshot shows the same Chrome River interface, but with updated values. The 'Estimated Amount' is now 1,740.00 USD. The 'Description' field contains the text 'Traveling from Pecan my homebase to MidValley to teach COCI-2516'. The 'Miles' field is now 3,000.00. The 'Rate' remains 0.58 and 'Deduction' remains None. The 'Calculate Mileage' button is still present. The PA Report ID and Total Estimated Amount at the bottom remain 010000432535 and 0.00 USD respectively.

The system allocated \$1,740.00 at 3,000 miles at .58 cents a mile. *****Note: The mileage rate may change at the beginning of the calendar year but if you simply overstate a little bit it should be ok.**

Click Save

CHROME RIVER

+ New Patricia Jackson

← Pre-Approval For Patricia Jackson +

PJackson_In District Mileage_090119-083120

EXPENSE

ESTIMATED

Click "+" to add your first item

PA Report ID
010000432535

Total Estimated Amount
0.00 USD

Submit

Mileage

Estimated Amount

1,740.00 USD

Description
Optional

Traveling from Pecan my homebase to MidValley to teach COCI-2516

Rate

0.58

Miles

3,000.00 [Calculate Mileage](#)

Deduction

None

Cancel

Save

Submitting a Pre-Approval – No Dean Approval needed

The system will bring you back to the expenses menu once you save.

CHROME RIVER

Pre-Approval For Patricia Jackson

PJackson_In District Mileage_090119-083120

EXPENSE ESTIMATED

Mileage 1,740.00 USD

PA Report ID: 010000432535

Total Estimated Amount: 1,740.00 USD

Submit

Add Pre-Approval Types

- AIR TRAVEL
- GROUND TRANSPORTATION
- HOTEL
- MEALS / ENTERTAINMENT
- REGISTRATION
- MISCELLANEOUS / OTHER
- PROFESSIONAL MEMBERSHIP DUES

Click the certification submit button as well.

CHROME RIVER

Submit Preapproval

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

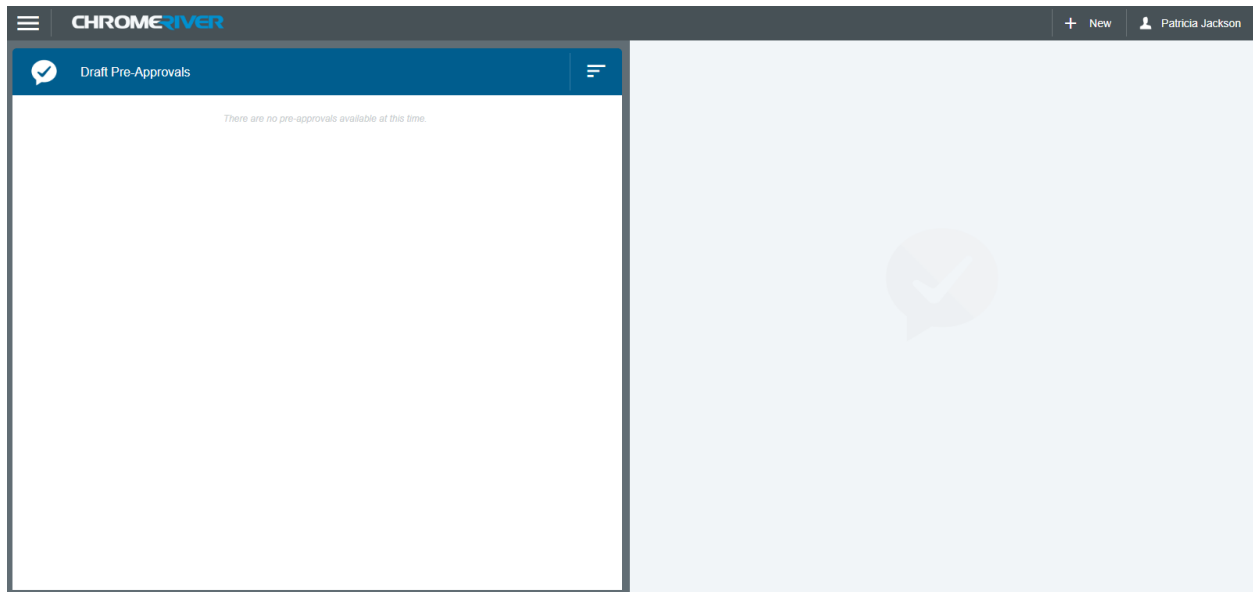
Cancel Submit

PJackson_In District Mileage_090119-083120

Report Owner	Patricia Jackson
Created By	Patricia Jackson
Create Date	06/23/2020
Pay Me Amount	1,740.00 USD
PA Report ID	010000432535
From Date	09/01/2019
To Date	08/31/2020
Business Purpose	I am traveling from Pecan which is my homebase to Mid Valley to teach SOCI-2630. See attached teaching schedule.

Expense Summary

The system will clear the draft dashboard and you can now see the pre-approval under the submitted pre-approvals.



You can see under the submitted that the status is still pending which means it has not been approved. You may recall your item for changes but not after it is approved.

Item Description	Date	Amount	Status
PJackson_In District Mileage_090119-083120 <small>010000432325</small>	06/23/2020	1,740.00 USD	PENDING
asdfsdfasdfsdfasdfsdfasdfsdfas	06/23/2020	132.00 USD	PENDING
P_Jackson_Austin TX_061420 <small>010000431889</small>	06/18/2020	1,767.42 USD	APPROVED
P_Jackson_Austin TX_061420 <small>010000431888</small>	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320 <small>010000431945</small>	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061620-061820 <small>010000426224</small>	05/29/2020	560.28 USD	PENDING
PJackson_Mileage Enc_090119-083120 <small>010000428331</small>	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
testtesttesttesttesttesttesttest	05/20/2020	183.00 USD	PENDING
TEST_Packson_Indistrictmileage_040120-043020	05/13/2020	0.00	

Once an item is fully approved it will say Approved on the dashboard.

If Dean approval is not required this is what you would see. Click Submit.

CHROMERIVER + New Patricia Jackson

Pre-Approvals For Patricia Jackson

P_Jackson_Austin TX_061420

0 Comments 6 Attachments

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD
Professional Membership Dues	125.00 USD

PA Report ID: 010000431869 Total Estimated Amount: 1,767.42 USD

Submit

Comments (0)

Add Comment Post

Attachments (6)

Drag image here to upload Upload Attachments

The system will bring you to the certification page:

CHROMERIVER + New Patricia Jackson

Submit Preapproval

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

Cancel **Submit**

P_Jackson_Austin TX_061420

Report Owner	Patricia Jackson
Created By	Patricia Jackson
Create Date	06/18/2020
Pay Me Amount	1,767.42 USD
PA Report ID	010000431869
From Date	06/14/2020
To Date	06/17/2020
Business Purpose	1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Expense Summary

Certify that all the information is true and correct by clicking the submit button. The system will let you know that the report has been submitted. My pre-approval is no longer on the draft section of my dashboard so I am going to click the hamburger menu at the top left-hand side of my screen.

Submitting a Pre-Approval – Yes Dean Approval needed

If you selected Yes for the Dean to approve question on the Report Header, the system will prompt you for the Dean when you click Submit. Click the drop box to display the Deans available.

The screenshot shows the Chrome River Pre-Approval interface for Patricia Jackson. On the left, a list of expenses is displayed with their estimated amounts. On the right, a 'Select Dean' prompt is shown, indicating that the following group(s) of pre-approved expenses require an approver to be selected. A search bar for the Dean is present, with a blue arrow pointing to it.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD
Professional Membership Dues	125.00 USD

PA Report ID: 010000435751
Total Estimated Amount: 1,767.42 USD

Select Dean

The following group(s) of pre-approved expenses require an approver to be selected.

110000- General Funds
410013-6300 Business Office, Bus & Fiscal Management 1,767.42 USD

Search for Dean

Choose the correct Dean by clicking on the name.

The screenshot shows the Chrome River Pre-Approval interface for Patricia Jackson. On the left, a list of expenses is displayed with their estimated amounts. On the right, a 'Select Dean' prompt is shown, indicating that the following group(s) of pre-approved expenses require an approver to be selected. A search bar for the Dean is present, with a blue arrow pointing to it. Below the search bar, a dropdown list of Deans is displayed, with the first option, Christopher Nelson, highlighted.

EXPENSE	ESTIMATED
Meals - Per Diem	48.80 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Meals - Per Diem	61.00 USD
Airfare	500.00 USD
Car Rental	110.00 USD
Hotel	300.62 USD
Conference / Seminar	500.00 USD
Professional Membership Dues	125.00 USD

PA Report ID: 010000435751
Total Estimated Amount: 1,767.42 USD

Select Dean

The following group(s) of pre-approved expenses require an approver to be selected.

110000- General Funds
410013-6300 Business Office, Bus & Fiscal Management 1,767.42 USD

Search for Dean

- Christopher Nelson
Dean for Liberal Arts
- Eric Reittinger
Dean for Soc & Behavioral Scs
- Ghanbar Esmaeili
"Dean for Math, Sci & BA Prgrms"
- Jayson Valerio
Dean for Nursing & Allied Hlth

*****Note: This drop-down list will list all Dean's. It is your responsibility to select the correct one. If you do not it will go to the incorrect Dean.**

Click the appropriate Dean.

In my example the Dean is Dean Jayson Valerio.

CHROME RIVER

Pre-Approvals For Patricia Jackson

PJackson_In District Mileage_090119-083120

EXPENSE ESTIMATED

Mileage 1,740.00 USD

PA Report ID: 010000432535

Total Estimated Amount: 1,740.00 USD

Submit

Select Dean

The following group(s) of pre-approved expenses require an approver to be selected.

110000-	General Funds	1,740.00 USD
224005-1070	Associate Degree Nursing, Health Occup-Associate Degree Nurs	

Jayson Valerio

Jayson Valerio
Dean for Nursing & Allied Hlth

Cancel Submit

Click submit.

The system will clear your draft dashboard and you can now see your pre-approval under your submitted pre-approvals.

CHROME RIVER

Draft Pre-Approvals

There are no pre-approvals available at this time.

You can see under the submitted pre-approvals that the status says pending which means it has not been approved. You may recall your item for changes but only if the status is pending.

This system will assign a report number starting with PA. You can find it under the report name.

Submitted Pre-Approvals			
PJackson_In District Mileage_090119-083120 010000432535	06/23/2020	1,740.00 USD	PENDING
asdfasdfsdfasdfsdfasdfsdfas 010000432499	06/23/2020	132.00 USD	PENDING
P_Jackson_Austin TX_061420 010000431889	06/18/2020	1,767.42 USD	APPROVED
P_Jackson_Austin TX_061420 010000431888	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320 010000431049	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820 010000428224	05/29/2020	560.28 USD	PENDING
PJackson_Mileage Enc_090119-083120 010000428331	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
testttestttesttsetsateateatetwet 010000428091	05/20/2020	183.00 USD	PENDING
TEST Packson_Indistrictmileage_040120-043020 010000427376	05/13/2020	0.00 USD	USED / EXPIRED

Once an item is fully approved it will say Approved on the dashboard.

The system will bring you to this screen. It will show you all the pre-approvals you have entered.

Submitted Pre-Approvals			
P_Jackson_Austin TX_061420 010000431889	06/18/2020	1,767.42 USD	PENDING
P_Jackson_Austin TX_061420 010000431888	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320 010000431049	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820 010000428224	05/29/2020	560.28 USD	PENDING
PJackson_Mileage Enc_090119-083120 010000428331	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
testttestttesttsetsateateatetwet 010000428091	05/20/2020	183.00 USD	PENDING
TEST Packson_Indistrictmileage_040120-043020 010000427376	05/13/2020	0.00 USD	USED / EXPIRED
TEST PJackson_nonstudentmileage_050120-051020 010000427377	05/13/2020	0.00 USD	USED / EXPIRED
Testing cash advance on mileage 010000427378	03/05/2020	183.24 USD	

Opening a Pre-Approval/PDF

At any time during the process you can always click on the hamburger menu and go to the dashboard which will bring you here. You can then click any of the blocks in the pre-approval section.

CHROMERIVER + New Patricia Jackson

APPROVALS Approvals Needed: 1 Expense Reports, 0 Pre-Approvals

EXPENSES 0 Draft, 0 Returned, 3 Submitted Last 90 Days

PRE-APPROVAL 1 Draft, 0 Returned, 6 Submitted Last 90 Days

SOUTH TEXAS COLLEGE

C O N T A C T

For Pre-Approvals and Expense report processing assistance, please contact:

- Main email for all supporting documents: traveloffice@southtexascollege.edu
- Tonya Ecker, Travel Assistant: 956-872-4618, tecker@southtexascollege.edu
- Melissa Lara, Travel Assistant: 956-872-4656, mmendoza_0438@southtexascollege.edu
- Maricarmen Ramirez, Accounts Payable / Travel Supervisor: 956-872-4602, mr Ramirez@southtexascollege.edu

N O T I C E S

All travel cancelled through August 31, 2020

Employee Travel Guide: <https://jagnet.southtexascollege.edu/web/jagnet/employee>

REMINDER: Per Diem Rules

Click on the pre-approval you want to view.

CHROMERIVER + New Patricia Jackson

Submitted Pre-Approvals

Pre-Approval ID	User	Date	Amount	Status
P_Jackson_Austin TX_061420 010000431886	P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	PENDING
P_Jackson_Austin TX_061420 010000431888	P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320 010000431048	P_Jackson_Austin TX_062320	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820 010000428254	TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28 USD	PENDING
PJackson_Mileage Enc_090119-093120 010000428331	PJackson_Mileage Enc_090119-093120	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
testtesttsetsateateateetwet 010000428091	testtesttsetsateateateetwet	05/20/2020	183.00 USD	PENDING
TEST Packson_Indistrictmileage_040120-043020 010000427378	TEST Packson_Indistrictmileage_040120-043020	05/13/2020	0.00 USD	USED / EXPIRED
TEST PJackson_nonstudentmileage_050120-051020 010000427377	TEST PJackson_nonstudentmileage_050120-051020	05/13/2020	0.00 USD	USED / EXPIRED
Testing cash advance on mileage		03/05/2020	183.24	

Click the open button

The screenshot shows the Chrome River interface. On the left, there is a table titled 'Submitted Pre-Approvals' with columns for report name, date, and amount. The first row is 'P_Jackson_Austin TX_061420' with a date of 06/18/2020 and an amount of 1,767.42 USD, marked as 'APPROVED'. On the right, the detailed view for 'P_Jackson_Austin TX_061420' is shown. It includes fields for Report Owner (Patricia Jackson), Created By (Patricia Jackson), Create Date (06/18/2020), Pay Me Amount (1,767.42 USD), PA Report ID (010000431869), From Date (06/14/2020), To Date (06/17/2020), and Business Purpose (1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.). Below this is a section for 'Prior Approvers' with a table showing Giovanni Colin as the approver on 06/18/2020.

The system will open the pre-approval on the right side of your screen and your expenses on the left-hand side.

The screenshot shows the Chrome River interface. On the left, there is a table titled 'Pre-Approvals For Patricia Jackson' with columns for report name, date, and amount. The first row is 'P_Jackson_Austin TX_061420' with a date of 06/18/2020 and an amount of 1,767.42 USD, marked as 'APPROVED'. On the right, the detailed view for 'P_Jackson_Austin TX_061420' is shown. It includes fields for Report Name (P_Jackson_Austin TX_061420), Start Date (06/14/2020), End Date (06/17/2020), Number of Days (4), Pay Me In (USD - US Dollars), Business Purpose (1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.), Travel Justification, Cash Advance Amount (185.44), and Report Type (Employee Travel).

Opening a PDF

At any time during your process you can always click on the hamburger menu and go to the dashboard which will bring you here. You can then click any of the blocks in the pre-approval section.

The screenshot shows the CHROME RIVER dashboard. The left sidebar has three main sections: APPROVALS (orange), EXPENSES (blue), and PRE-APPROVAL (dark blue). The PRE-APPROVAL section is expanded, showing a table with counts for Draft (1), Returned (0), and Submitted Last 90 Days (6). Blue arrows point to these counts. The right sidebar shows the South Texas College logo, contact information for travel assistance, and a notice about cancelled travel.

Section	Draft	Returned	Submitted Last 90 Days
APPROVALS	1 Expense Reports	0 Pre-Approvals	
EXPENSES	0	0	3
PRE-APPROVAL	1	0	6

CONTACT

For Pre-Approvals and Expense report processing assistance, please contact:

- Main email for all supporting documents: traveloffice@southtexascollege.edu
- Tonya Ecker, Travel Assistant: 956-872-4618, tecker@southtexascollege.edu
- Melissa Lara, Travel Assistant: 956-872-4656, mmendoza_0438@southtexascollege.edu
- Maricarmen Ramirez, Accounts Payable / Travel Supervisor: 956-872-4602, mr Ramirez@southtexascollege.edu

NOTICES

All travel cancelled through August 31, 2020

Employee Travel Guide: <https://jagnet.southtexascollege.edu/web/jagnet/employee>

REMINDER: Per Diem Rules

You then click on the pre-approval you want to print the PDF for.

The screenshot shows the CHROME RIVER dashboard with the Submitted Pre-Approvals section expanded. It displays a list of pre-approvals with columns for Name, Date, Amount, and Status. The list includes items like P_Jackson_Austin TX_061420, TEST_P_Jackson_Sedona AZ_061520-061820, and TEST_P_Jackson_Mileage Enc_090119-083120.

Name	Date	Amount	Status
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	PENDING
P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28 USD	PENDING
P_Jackson_Mileage Enc_090119-083120	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
testtesttesttesttesttesttesttest	05/20/2020	183.00 USD	PENDING
TEST Packson_Indistrictmileage_040120-043020	05/13/2020	0.00 USD	USED / EXPIRED
TEST PJackson_nonstudentmileage_050120-051020	05/13/2020	0.00 USD	USED / EXPIRED
Testing cash advance on mileage	03/05/2020	183.24	

Click the PDF button

The screenshot shows the 'Submitted Pre-Approvals' page in the Chrome River system. The left sidebar contains a list of pre-approvals with columns for title, date, and amount. The right pane shows the details for 'P_Jackson_Austin TX_061420'. The top right action bar includes buttons for 'Open', 'PDF', 'Tracking', 'Expire', and 'Duplicate'. A blue arrow points to the 'PDF' button.

Submitted Pre-Approvals		
P_Jackson_Austin TX_061420 010000431869	06/18/2020	1,767.42 USD APPROVED
P_Jackson_Austin TX_061420 010000431868	06/18/2020	1,767.42 USD USED / EXPIRED
P_Jackson_Austin TX_062320 010000431048	06/15/2020	1,767.42 USD APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820 010000426224	05/29/2020	560.28 USD PENDING
P_Jackson_Mileage Enc_090119-083120 010000428331	05/21/2020	1,582.24 USD PARTIALLY APPLIED
testtesttesttesttesttesttesttest 010000428091	05/20/2020	183.00 USD PENDING
TEST Packson_Indistrictmileage_040120-043020 010000427376	05/13/2020	0.00 USD USED / EXPIRED
TEST P_Jackson_nonstudentmileage_050120-051020 010000427377	05/13/2020	0.00 USD USED / EXPIRED
Testing cash advance on mileage 010000427377	03/05/2020	183.24 USD USED / EXPIRED

P_Jackson_Austin TX_061420

Report Owner: Patricia Jackson

Created By: Patricia Jackson

Create Date: 06/18/2020

Pay Me Amount: 1,767.42 USD

PA Report ID: 010000431869

From Date: 06/14/2020

To Date: 06/17/2020

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Prior Approvers

APPROVER	DATE
Giovanni Colin	06/18/2020

This screenshot is similar to the one above, but the 'PDF' button has been clicked, opening a dropdown menu. A blue arrow points to the 'Full Report with Receipts' option in the menu.

P_Jackson_Austin TX_061420

Report Owner: Patricia Jackson

Created By: Patricia Jackson

Create Date: 06/18/2020

Pay Me Amount: 1,767.42 USD

PA Report ID: 010000431869

From Date: 06/14/2020

To Date: 06/17/2020

Business Purpose: 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.

Prior Approvers

APPROVER	DATE
Giovanni Colin	06/18/2020

You get two choices: Full Report or Full Report with Receipts. Choose the one you would like to print.

Full report will only give you the report without the attachments. Full report with receipts will include all attachments.

Tracking a Pre-Approval

If you click tracking the system will tell you where the pre-approval is in the approval process.

The screenshot shows the Chrome River interface. On the left, a table lists submitted pre-approvals. On the right, a detailed view of a specific pre-approval is shown, including its status, amount, and routing steps.

Item ID	Item Name	Date	Amount	Status
P_Jackson_Austin TX_061420	P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	APPROVED
P_Jackson_Austin TX_061420	P_Jackson_Austin TX_061420	06/18/2020	1,767.42 USD	USED / EXPIRED
P_Jackson_Austin TX_062320	P_Jackson_Austin TX_062320	06/15/2020	1,767.42 USD	APPROVED
TEST_P_Jackson_Sedona AZ_061520-061820	TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28 USD	PENDING
PJackson_Mileage Enc_090119-083120	PJackson_Mileage Enc_090119-083120	05/21/2020	1,582.24 USD	PARTIALLY APPLIED
testtesttesttesttesttesttesttest	testtesttesttesttesttesttesttest	05/20/2020	183.00 USD	PENDING
TEST Packson_Indistrictmileage_040120-043020	TEST Packson_Indistrictmileage_040120-043020	05/13/2020	0.00 USD	USED / EXPIRED
TEST PJackson_nonstudentmileage_050120-051020	TEST PJackson_nonstudentmileage_050120-051020	05/13/2020	0.00 USD	USED / EXPIRED
Testing cash advance on mileage	Testing cash advance on mileage	03/05/2020	183.74	

The detailed view on the right shows the following information:

- Item:** P_Jackson_Austin TX_061420
- Report Owner:** Patricia Jackson
- Created By:** Patricia Jackson
- Create Date:** 06/18/2020
- Pay Me Amount:** 1,767.42 USD
- PA Report ID:** 010000431869
- From Date:** 06/14/2020
- To Date:** 06/17/2020
- Business Purpose:** 1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.
- Prior Approvers:**

APPROVER	DATE
Giovanni Colin	06/18/2020

In this example the item is fully approved.

The screenshot shows the Chrome River interface with the tracking details for a specific pre-approval. The tracking view shows the status, estimated amount, and routing steps.

Field	Value
Status	Approved
Estimated Amount	1,767.42 USD
Routing Steps	
Step Number	1
Approver	Maricarmen Ramirez
Assigned Date	06/18/2020 02:35 PM
Step Status	Re-Assigned
Re-Assigned By	Giovanni Colin
Re-Assigned Date	06/18/2020 03:23 PM
Approver	Giovanni Colin

You may open the tracking function as many times as you want throughout the approval process. Just make sure to open the pre-approval and then click tracking.

Recalling a Pre-Approval

If you click Recall it will tell you that the report will be moved to the draft list. If I select Yes it will move my pre-approval to the draft side and I can amend as I wish and resubmit.

The screenshot displays the CHROME RIVER system interface. On the left, a table lists 'Submitted Pre-Approvals' with columns for report name, date, and amount. A modal dialog box titled 'Recall This Report?' is open, asking 'This report will be moved to the draft list.' with 'No' and 'Yes' buttons. On the right, a detailed view of a report 'P_Jackson_Austin TX_062320' is shown, including fields for Report Owner, Created By, Create Date, To Date, Business Purpose, and an Expense Summary table.

Report Name	Date	Amount (USD)	Status
P_Jackson_Austin TX_062320	06/15/2020	1,767.42	PENDING
TEST_P_Jackson_Sedona AZ_061520-061820	05/29/2020	560.28	PENDING
PJackson_Mileage Enc_090119-083120	05/21/2020	1,582.24	PENDING
testtesttesttesttesttesttestwet	05/20/2020		
TEST Packson_Indistrictmileage_040120-043020	05/13/2020		USED / EXPIRED
TEST PJackson_nonstudentmileage_050120-051020	05/13/2020	0.00	USED / EXPIRED
Testing cash advance on mileage	03/05/2020	183.24	APPROVED
Test_nonstudentclubtravelinstate_207-208	02/07/2020	959.80	PENDING
Test Non-Student Club Travel In State w/Dean	02/06/2020	0.00	

Field	Value
Report Owner	Patricia Jackson
Created By	Patricia Jackson
Create Date	06/12/2020
To Date	06/26/2020
Business Purpose	1. What is the purpose of the travel? To learn changes of the Title IV programs 2. Why is the travel necessary? To educate myself of the Title IV changes 3. How does the travel benefit STC? We will be current on any Title IV changes.

Expense Summary	AMOUNT (USD)	SUBMITTED (USD)
Airfare	500.00	0.00

*****You can recall a pre-approval as long as it hasn't been fully approved.**

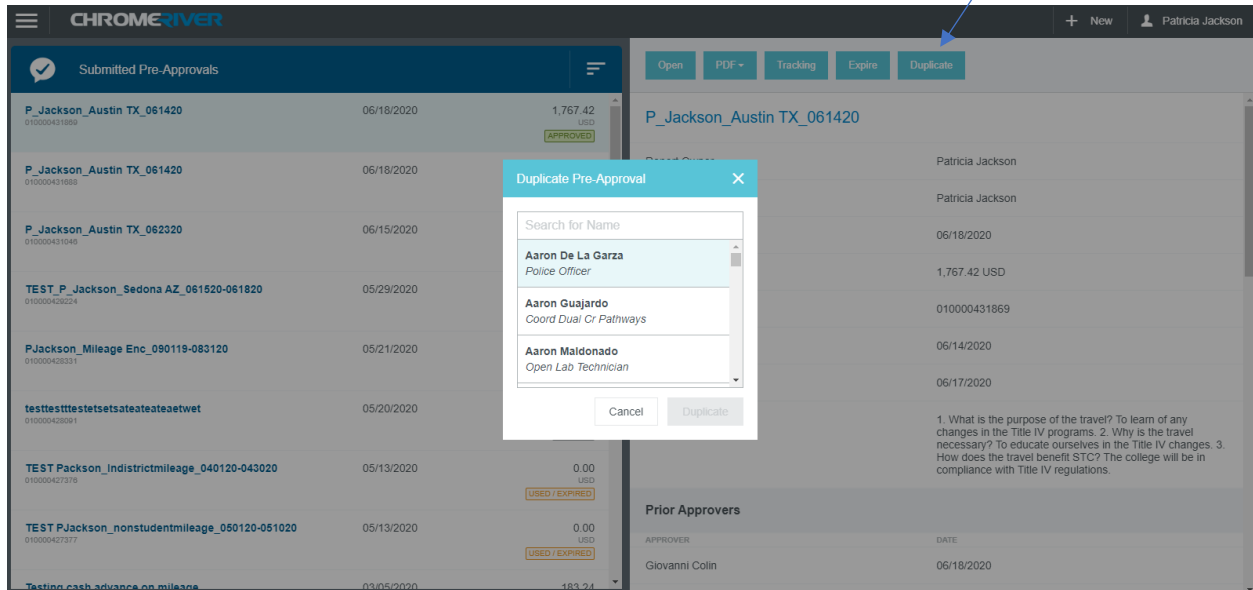
NOTE:

If the "recall" button is used by the department, all items including the report name can be updated.

Should an item be "returned" to the department, the report name cannot be updated. In order to update the report name, the item would have to be deleted and the delegate or traveler would have to start the report from the beginning.

Duplicating a Pre-Approval

If you press Duplicate, a pop-up menu will appear and you will select the traveler you want to duplicate the pre-approval for from the drop-down. You can also do a name search. Click on the name.



The system will let you know it was duplicated successfully. This option can be helpful when you have been delegated access to several employees who are traveling on the same trip. Keep in mind the new pre-approval duplicated will have to be reviewed for any changes that do not apply to the employee who received the duplicate copy.

Returned Pre-Approval

When an approver has returned a pre-approval request to the requester during the approval process, it will appear in the Returned Pre-Approvals list. To access it tap on **RETURNED** in the Pre-Approval section of the Dashboard.



You may click on the returned block of the pre-approval section and highlight the pre-approval that was returned and correct the items you need by opening the pre-approval and clicking the Edit button. Save and resubmit.

NOTE:

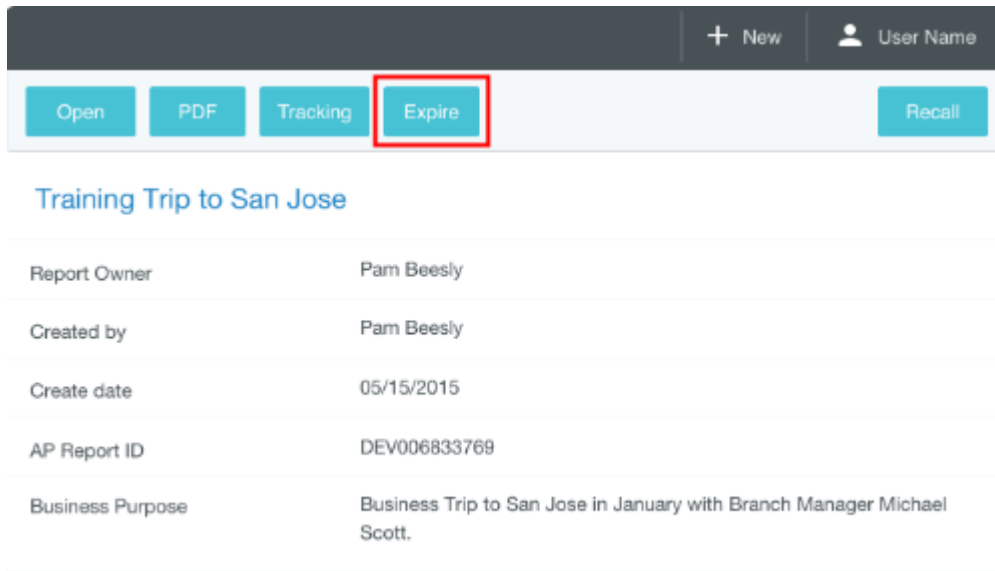
If the “recall” button is used by the department, all items including the report name, can be updated/edited.

Should an item be “returned” to the department, the report name cannot be updated. In order to update the report name, the item would have to be deleted and the delegate or traveler would have to start the report from the beginning.

Expire Pre-Approval

The expire button is available to clear encumbrances for trips that are not taken, or for encumbrances that were not fully processed for payment (discount available for registration, lodging pricing less than originally quoted, etc).

Procedures are being developed and permission should be requested from Financial Manager prior to using this feature, however, for now – *please contact the Travel Office prior to expiring travel funds.*



Top navigation bar: + New, User Name

Report Actions: Open, PDF, Tracking, **Expire**, Recall

Training Trip to San Jose

Report Owner	Pam Beesly
Created by	Pam Beesly
Create date	05/15/2015
AP Report ID	DEV006833769
Business Purpose	Business Trip to San Jose in January with Branch Manager Michael Scott.

Are You Sure? ×

Are you sure you want to expire this Pre-Approval? You will no longer be able to link it to expense reports.

Cancel

Expire

Pre-Approval Email Request

As a pre-approval moves in the approval process to Supervisors, Financial Managers, Deans, Vice President, and President, each will receive a notification email to notify them of their pending approval. If it goes more than forty-eight hours without being approved the system will send a reminder email and continue at the same forty-eight hour interval until approved.

Pre-Approval ID: 0100-0043-1869

ACTION REQUIRED		Chrome River
Pre-Approval Request For	Patricia Jackson [Accountant, pajackson@southtexascollege.edu]	
Report Name	P_Jackson_Austin TX_061420	
Pre-Approval ID	0100-0043-1869	
Submit Date	06/18/2020	
Expense Dates	06/14/2020 - 06/17/2020	
Total Expenses Approved	1,767.42 USD	
Start Date	Jun 14, 2020	
Business Purpose	1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.	
Location	In State	
TravelerID	A00136468	
End Date	Jun 17, 2020	
Report Type	Employee Travel	
Cash Advance Amount	185	
Business Purpose		
1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.		
Expense Details		
Airfare	500.00 USD	
Description	A00000659 Shands Brook Travel	
Is this going to be paid by STC?	Yes	
Car Rental	110.00 USD	
Description	A00464964 Enterprise Car Rental	
Is this going to be paid by STC?	Yes	
Please provide REQ/PO number for car rental	R0033181	
Conference / Seminar	500.00 USD	
Description	A00461448 Educause Inc Early Bird registration is due on 05/25/2020 if not registration fee will go up. susan.watkins@educause.org 512-387-2089	
Please provide any contact information to allow us to process the payment (email, phone, etc.)	May 20, 2020	
Please provide deadline for registration	Yes	
Is employee already registered?	Yes	
Is this going to be paid by STC?	Yes	
Please provide any additional info needed for registration	Please make payment to Educause Inc. They do not take credit cards	
Hotel	300.62 USD	
Description	A00370286 Embassy Suites Austin Arboretum Room rate is \$250.00, hotel taxes are 8.50% or \$21.25 for city taxes, 6% or \$15.00 for state taxes, 1.75% or \$4.37 for county taxes, 10% or \$25.00 for resort fees. Trip is in state so state taxes do not apply. Fees that apply are \$250.00+\$21.25+\$4.37+\$25.00=\$300.62. Hotel does not provide breakfast	
Is this going to be paid by STC?	Yes	
Vendor	A00370286 Embassy Suites Austin Arboretum	
Vendor City	Austin	
PerDiem	48.80 USD	
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem	61.00 USD	
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem	61.00 USD	
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	

Continued email on next page.

<p>paid by STC? Please provide any additional info needed for registration</p>		<p>Pease make payment to Educause Inc. They do not take credit cards</p>
<p>Hotel</p>		<p>300.62 USD</p>
<p>Description</p>	<p>A00370286 Embassy Suites Austin Arboretum Room rate is \$250.00, hotel taxes are 8.50% or \$21.25 for city taxes, 6% or \$15.00 for state taxes, 1.75% or \$4.37 for county taxes, 10% or \$25.00 for resort fees. Trip is in state so state taxes do not apply. Fees that apply are \$250.00+\$21.25+\$4.37+\$25.00=\$300.62. Hotel does not provide breakfast</p>	
<p>Is this going to be paid by STC?</p>	<p>Yes</p>	
<p>Vendor</p>	<p>A00370286 Embassy Suites Austin Arboretum</p>	
<p>Vendor City</p>	<p>Austin</p>	
<p>PerDiem</p>		<p>48.80 USD</p>
<p>Description</p>	<p>A00136468 Patricia A Jackson</p>	
<p>Is this going to be paid by STC?</p>	<p>Yes</p>	
<p>PerDiem</p>		<p>61.00 USD</p>
<p>Description</p>	<p>A00136468 Patricia A Jackson</p>	
<p>Is this going to be paid by STC?</p>	<p>Yes</p>	
<p>PerDiem</p>		<p>61.00 USD</p>
<p>PerDiem</p>		<p>61.00 USD</p>
<p>Description</p>	<p>A00136468 Patricia A Jackson</p>	
<p>Is this going to be paid by STC?</p>	<p>Yes</p>	
<p>PerDiem</p>		<p>61.00 USD</p>
<p>Description</p>	<p>A00136468 Patricia A Jackson</p>	
<p>Is this going to be paid by STC?</p>	<p>Yes</p>	
<p>Professional Membership Dues</p>		<p>125.00 USD</p>
<p>Description</p>	<p>A00001234 O'Reilly's Auto</p>	
<p>Is this going to be paid by STC?</p>	<p>Yes</p>	
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="background-color: green; color: white; padding: 5px 10px; border: 1px solid black;">ACCEPT</div> <div style="background-color: red; color: white; padding: 5px 10px; border: 1px solid black;">RETURN</div> </div>		

Pre-Approval ID: 0100-0043-1869

To take action on these expenses, take either of the following steps:

- Click on the **ACCEPT** or **RETURN** button as appropriate and add any comments to the new email that opens,
- OR **FORWARD** this email to approve@preapproval.ca1.chromeriver.com or return@preapproval.ca1.chromeriver.com with any comments at the top of the forwarded message.

To view this expense report or access the Chrome River application, [click here](#).

The pre-approval can be approved directly from your email without logging into ChromeRiver by clicking on the Accept or Return button.

Pre-Approval Email Notification

The traveler will receive this email once the pre-approval is fully approved. The delegate will never receive an email so they will have to request the approval email from the traveler or track it in the system to see the status.

NO ACTION REQUIRED

Chrome River

The following Pre-Approval Request has been approved.

Pre-Approval Request For	Patricia Jackson
Report Name	P_Jackson_Austin TX_061420
Pre-Approval ID	0100-0043-1869
Submit Date	06/18/2020
Expense Dates	06/14/2020 - 06/17/2020
Total Expenses	1,767.42 USD

Approving a Pre-Approval

To approve a pre-approval via email, make sure to check all the expenses then click the Accept button at the bottom. To return for correction you click the Return button at the bottom.

Pre-Approval ID: 0100-0043-1869

ACTION REQUIRED		Chrome River
Pre-Approval Request For	Patricia Jackson [Accountant, pajackson@southtexascollege.edu]	
Report Name	P.Jackson_Austin TX_061420	
Pre-Approval ID	0100-0043-1869	
Submit Date	06/18/2020	
Expense Dates	06/14/2020 - 06/17/2020	
Total Expenses Approved	1,767.42 USD	
Start Date	Jun 14, 2020	
Business Purpose	1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.	
Location	In State	
TravelerID	A00136468	
End Date	Jun 17, 2020	
Report Type	Employee Travel	
Cash Advance Amount	185	
Business Purpose		
1. What is the purpose of the travel? To learn of any changes in the Title IV programs. 2. Why is the travel necessary? To educate ourselves in the Title IV changes. 3. How does the travel benefit STC? The college will be in compliance with Title IV regulations.		
Reason for Assignment		
Reports To Supervisor		
Account Summary		
		Amount (USD)
110000-110000	100.00% General Funds	Business Office, Bus & Fiscal
410013-6300		Management
		1,767.42
Expense Details		
Airfare		500.00 USD
Description	A00000659 Shands Brook Travel	
Is this going to be paid by STC?	Yes	
Car Rental		110.00 USD
Description	A00464964 Enterprise Car Rental	
Is this going to be paid by STC?	Yes	
Please provide REQ/PO number for car rental	R0033181	
Conference / Seminar		500.00 USD
Description	A00461448 Educause Inc Early Bird registration is due on 05/25/2020 if not registration fee will go up.	
Please provide any contact information to allow us to process the payment (email, phone, etc.)	susan.watkins@educause.org 512-387-2089	
Please provide deadline for registration	May 20, 2020	
Is employee already registered?	Yes	
Is this going to be paid by STC?	Yes	
Please provide any additional info needed for registration	Please make payment to Educause Inc. They do not take credit cards	
Hotel		300.62 USD
Description	A00370286 Embassy Suites Austin Arboretum Room rate is \$250.00, hotel taxes are 8.50% or \$21.25 for city taxes, 6% or \$15.00 for state taxes, 1.75% or \$4.37 for county taxes, 10% or \$25.00 for resort fees. Trip is in state so state taxes do not apply. Fees that apply are \$250.00+\$21.25+\$4.37+\$25.00=\$300.62. Hotel does not provide breakfast	
Is this going to be paid by STC?	Yes	
Vendor	A00370286 Embassy Suites Austin Arboretum	
Vendor City	Austin	
PerDiem		48.80 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	

Continued from previous page

paid by STC?		Pease make payment to Educause Inc. They do not take credit cards
Please provide any additional info needed for registration		
Hotel		300.62 USD
Description	A00370286 Embassy Suites Austin Arboretum Room rate is \$250.00, hotel taxes are 8.50% or \$21.25 for city taxes, 6% or \$15.00 for state taxes, 1.75% or \$4.37 for county taxes, 10% or \$25.00 for resort fees. Trip is in state so state taxes do not apply. Fees that apply are \$250.00+\$21.25+\$4.37+\$25.00=\$300.62. Hotel does not provide breakfast	
Is this going to be paid by STC?	Yes	
Vendor	A00370286 Embassy Suites Austin Arboretum	
Vendor City	Austin	
PerDiem		48.80 USD
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Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
PerDiem		61.00 USD
Description	A00136468 Patricia A Jackson	
Is this going to be paid by STC?	Yes	
Professional Membership Dues		125.00 USD
Description	A00001234 O'Reilly's Auto	
Is this going to be paid by STC?	Yes	

ACCEPT
RETURN

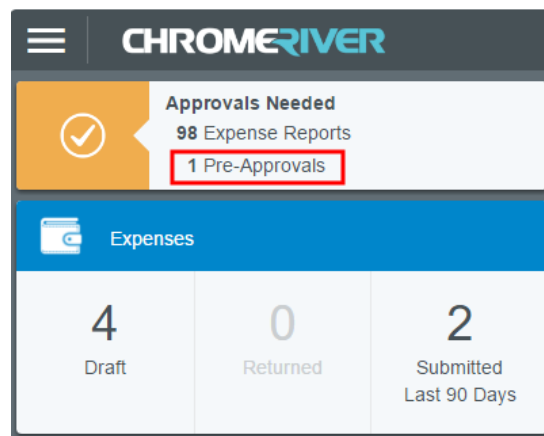
Pre-Approval ID: 0100-0043-1869

To take action on these expenses, take either of the following steps:

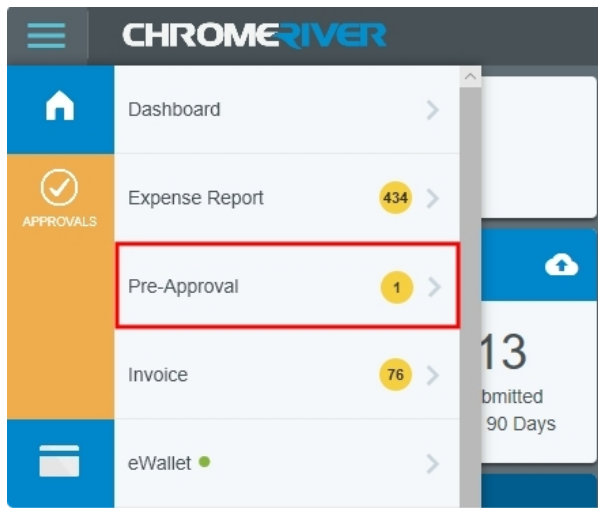
- Click on the **ACCEPT** or **RETURN** button as appropriate and add any comments to the new email that opens,
- OR **FORWARD** this email to approve@preapproval.ca1.chromeriver.com or return@preapproval.ca1.chromeriver.com with any comments at the top of the forwarded message.

To view this expense report or access the Chrome River application, [click here](#).

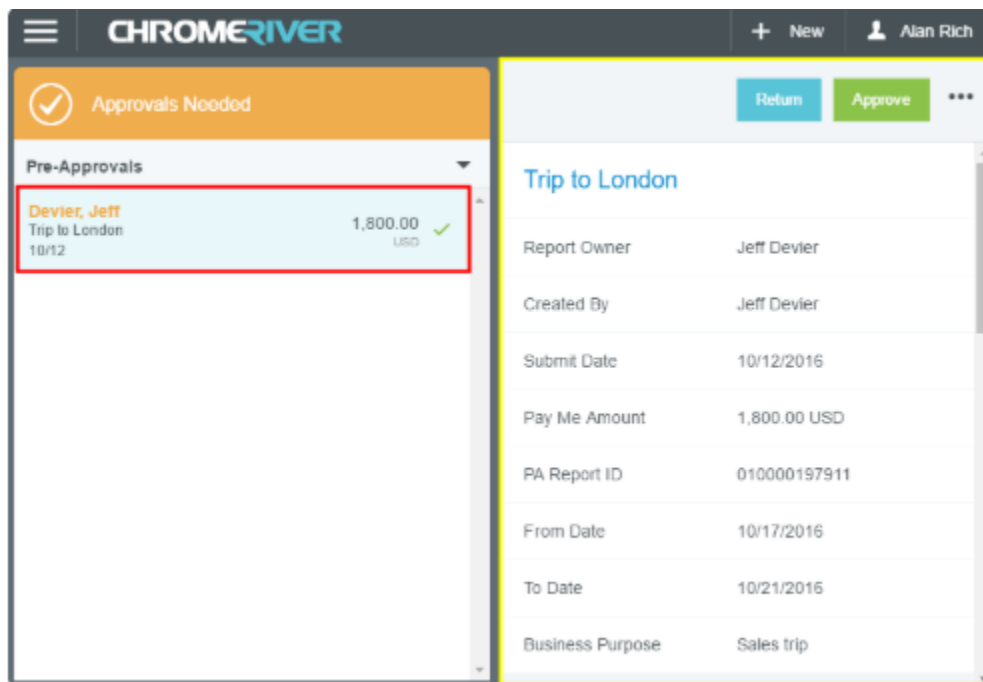
You can also approve via the Chrome River app by going to the dashboard. In the **Approvals Needed** notification bar at the top of the Dashboard, tap on **PRE-APPROVALS**.



You may also access your approvals by tapping the **MENU** button and selecting Pre-Approval. The yellow circle shows the number of pre-approvals waiting for you.



The Approvals Needed list displays all the pre-approvals awaiting your approval under the **Pre-Approval** tab. Tap on the approval you wish to view and a preview will slide in from the right. Then click approve after you have reviewed all items.



Approving a Pre-Approval

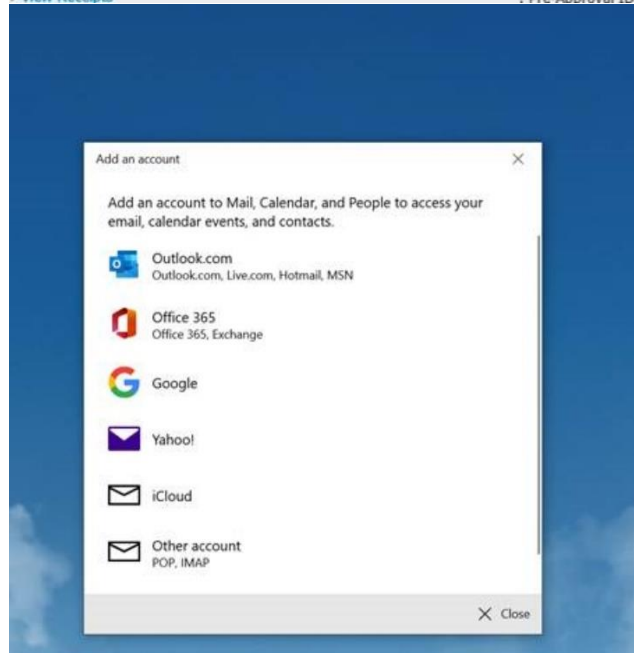
Outlook Email issues

As indicated during the Chrome River Training Sessions, an approval request email will be submitted to all Supervisors and Financial Managers, or they may log into JagNet and access Chrome River through the icons, under employee, as soon as you log in.

If you click on the email to review and accept or return the Chrome River document, some supervisors are seeing:

Travel Justification	Vinyl signage project		
TravelerID	A00032411		
End Date	Aug 13, 2020		
Report Type	Employee Travel		
Business Purpose			
a) What is the purpose of the travel? To create and install vinyl signage for all campus libraries. b) Why is the travel necessary? To have professional and consistent signage in all locations. c) How does the travel benefit STC? To provided our students, faculty, staff, and community patrons with clear informational signs.			
Reason for Assignment			
Route to Financial Manager			
Account Summary			Amount (USD)
110000-530005-4100	100.00%	General Funds	Library Automation, Library
			86.33
Expense Details			
Mileage			86.33 USD
Description	From: 3201 Pecan Boulevard, McAllen, TX, USA To: 142 FM 3167, Rio Grande City, TX 78582, USA To: 3201 Pecan Boulevard, McAllen, TX, USA To: 1901 S McColl Rd, McAllen, TX 78503, USA To: 3201 Pecan Boulevard, McAllen, TX, USA To: 400 N Border Ave, Weslaco, TX 78596, USA To: 3201 Pecan Boulevard, McAllen, TX, USA To: 1901 S McColl Rd, McAllen, TX 78503, USA To: 3201 Pecan Boulevard, McAllen, TX, USA		
ACCEPT		RETURN	

> View Receipts : Pre-Approval ID 0100-0045-3000



After discussion with Chrome River support, this is related to the device settings and not the email information on Chrome River. We are checking with I.T. to see if Outlook can be set up as the default email application, however, in the meantime:

If you are using an STC computer follow the steps below to set up Outlook as default in order to correct the issue.

- 1.) Click on Windows menu
- 2.) Type "Default Apps" and hit enter
- 3.) Under Email, click on the default icon and select Outlook

