

Chrome River

How to Create a Travel Pre-Approval

Chrome River Travel and Expense is a comprehensive, automated travel and expense system. This system automates the approval process for travel pre-approvals (authorizations), travel expense and direct pay payments.

There are advantages in using the Chrome River Travel System. The traveler or a delegate (a person authorized to enter travel on the traveler's behalf) are able to enter a Pre-Approval and Expense Reports for University travel.

Information in this document:

How to Create a Travel Pre-Approval

Creating a Pre-Approval for a Non-Employee

Attaching documentation

Submitting a Pre-Approval




How to Create a Travel Pre-Approval

- Before traveling for the university a Travel Pre-Approval needs to be created and fully approved.
- A Pre-Approval may be created by the traveler or by the traveler's designated delegate.
- A Vendor Maintenance Form will need to be completed before creating a Pre-Approval for Independent Contractor, Non-Employee, and Student Travelers.
- A Pre-Approval represents the estimated cost of the traveler's trip.
- The total Pre-Approval estimated expense will be encumbered.

Vendor Maintenance Form

- Before creating a Pre-Approval for a Non-Employee you must complete the Vendor Maintenance Form to add the traveler to Chrome River.
- Information needed
 - Non-Employees full name
 - Mailing Address
 - City/State/Zip Code
 - Phone Number
 - Email Address
 - Department Name responsible for processing the travel.
 - Delegate – person responsible for entering travel on behalf of the traveler.



UNIVERSITY of NORTH CAROLINA WILMINGTON

This form is for adding new people/payees to Chrome River. Once processed the payee will be added to the system within 24 hours.

Please complete the section for the type of payee to be added.

Employee:

Name: _____ Banner ID: _____
Campus Box: _____ Department: _____

Non-Employee/Student Traveler:

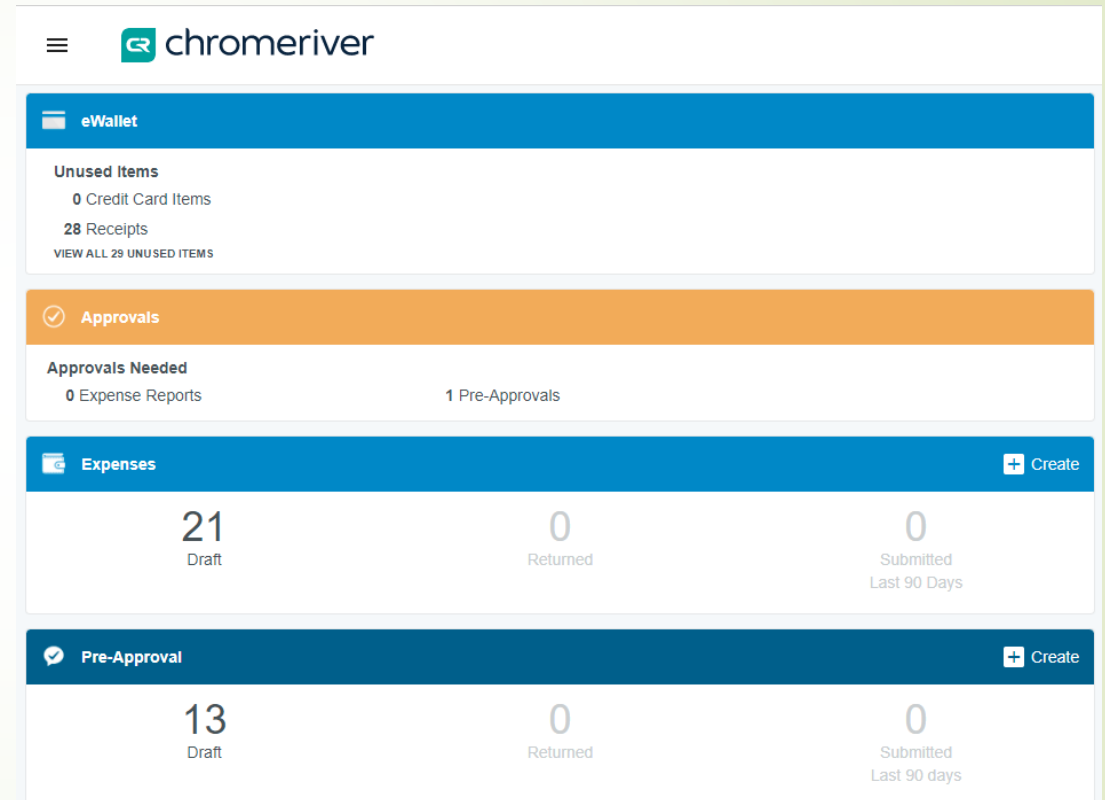
Name: _____
Street Address: _____
City/State: _____ Zip: _____
Phone: _____
Email: _____
Department responsible for travel: _____
Person responsible for entering travel: _____

Vendor:

Payee Name: _____
Payment Street Address: _____
City/State: _____ Zip: _____
Phone: _____ Fax: _____
Email (optional): _____
W9 Requested: Yes/No

Creating Pre-Approval Header

- Pre-Approvals are required for all travel regardless if any travel expenses will be incurred. For these types of trips a Pre-Approval should be entered for \$1.00.
- Pre-Approvals are required for local travel within New Hanover and surrounding counties. The Pre-Approval serves as permission for employees, student and student groups to be off campus.
- Click on the + Create icon located on right side of the Pre-Approval ribbon.
- The Pre-Approval Header will appear.



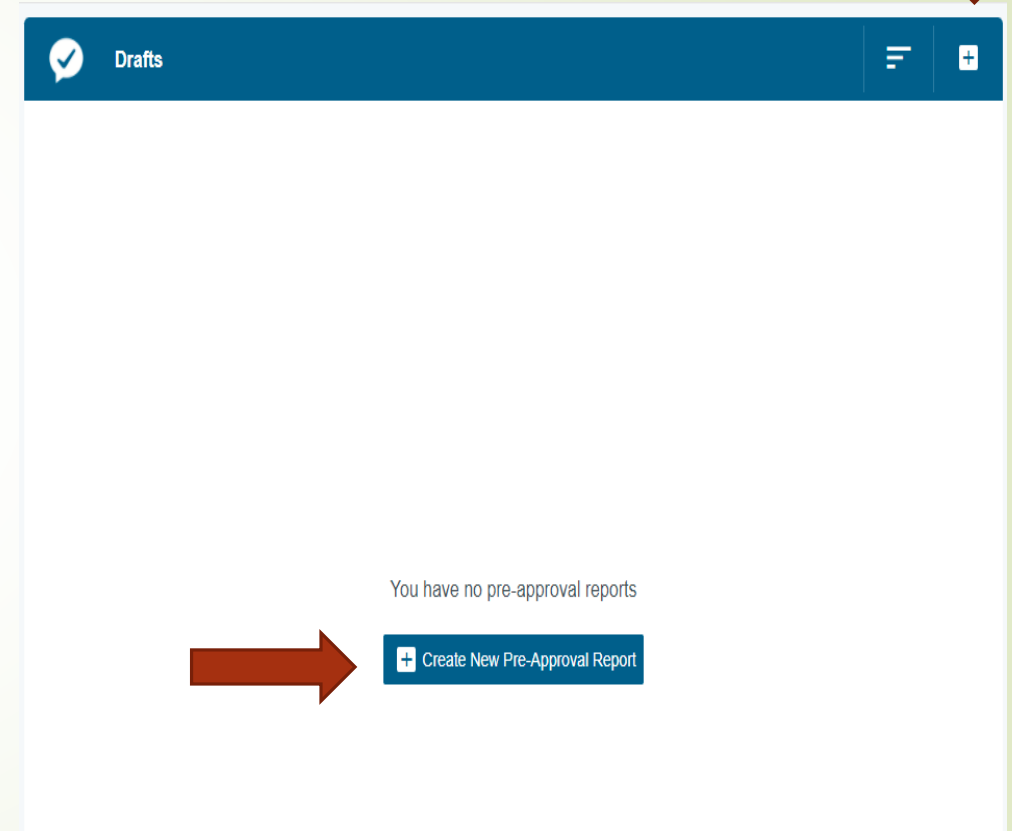
The screenshot shows the Chromeriver dashboard with the following sections:

- eWallet**: 0 Credit Card Items, 28 Receipts, VIEW ALL 28 UNUSED ITEMS
- Approvals**: 0 Expense Reports, 1 Pre-Approvals
- Expenses**: 21 Draft, 0 Returned, 0 Submitted Last 90 Days, + Create
- Pre-Approval**: 13 Draft, 0 Returned, 0 Submitted Last 90 days, + Create

A blue arrow points to the '+ Create' icon on the right side of the Pre-Approval ribbon.

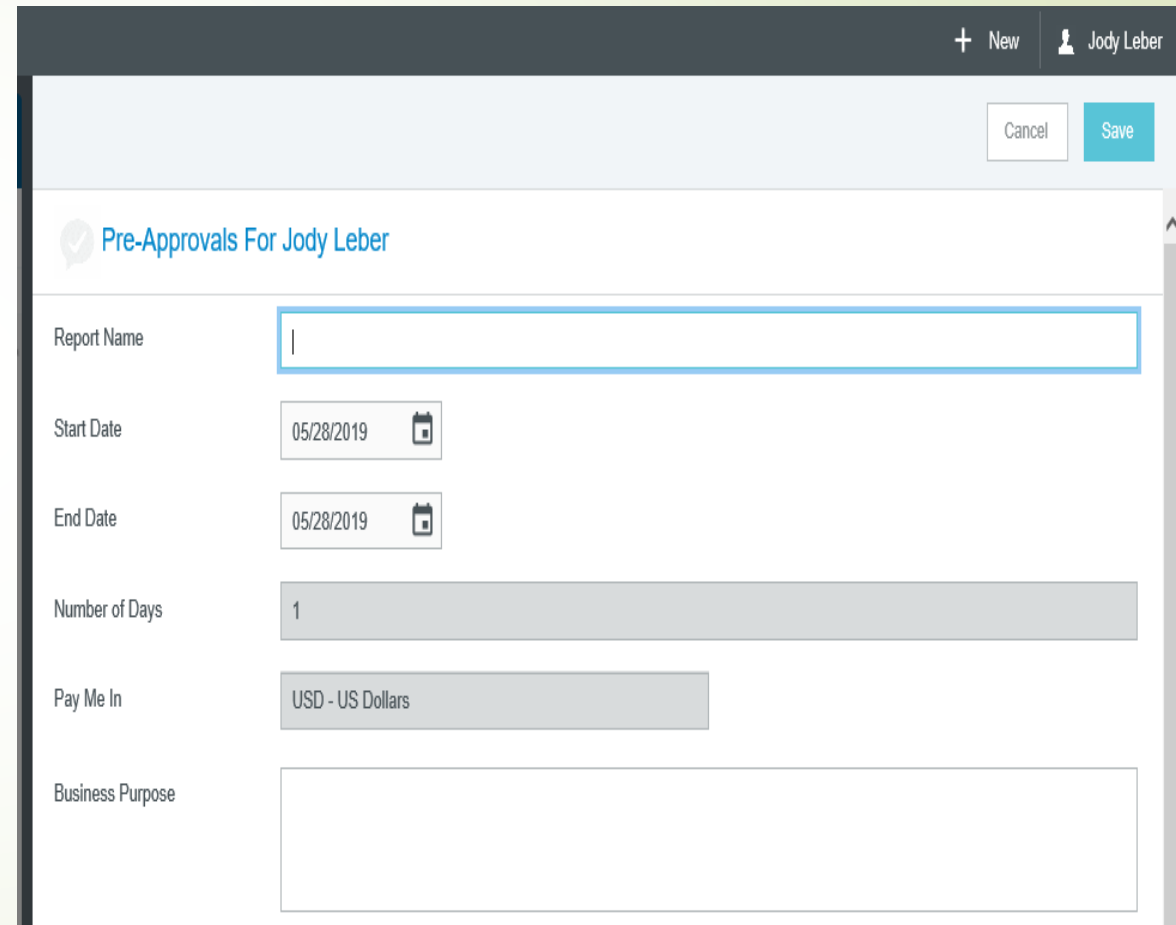
Creating Pre-Approval Header

- ▶ New Pre-Approval reports can also be created by clicking on the + icon at the top of the Draft queue.
- ▶ If the Draft queue does not consist of any drafts then a creation option can also be found in the middle of the queue.



Creating Pre-Approval Header

- The header information on the Pre-Approval includes the following information
 - Report Name – Enter the conference name or type of trip and the year.
 - Start and End travel dates
 - Business Purpose – provide detailed information as to what and why you are traveling.



The screenshot shows a web interface for creating a pre-approval header. At the top right, there are buttons for '+ New' and a user profile icon for 'Jody Leber'. Below this, there are 'Cancel' and 'Save' buttons. The main heading is 'Pre-Approvals For Jody Leber'. The form fields are as follows:

Report Name	<input type="text"/>
Start Date	05/28/2019
End Date	05/28/2019
Number of Days	1
Pay Me In	USD - US Dollars
Business Purpose	<input type="text"/>

Creating Pre-Approval Header

- Starting and Ending Times
- Travel Type
 - Athletic Recruiting Travel
 - Athletic Team Travel
 - Employee Travel
 - Independent Contractor Travel
 - Non-Employee Travel
 - Student Group Travel
 - Student Employee Travel
 - Student Travel

Pay Me In	<input type="text" value="USD - US Dollars"/>
Business Purpose	<input type="text"/>
Starting Time	<input type="text" value="-- Select --"/>
Ending Time	<input type="text" value="-- Select --"/>
Travel Type	<input type="text" value="-- Select --"/>
Location	<input type="text" value="-- Select --"/>
Destination: City, State	<input type="text"/>

Creating Pre-Approval Header

- ▶ Athletic Recruiting Travel – University coaches traveling for athletic team sports recruiting.
- ▶ Athletic Team Travel – Any UNCW sporting team that travels to compete in games for their respective sport.
- ▶ Employee Travel – Any faculty or staff member working at the university on a temporary or permanent basis and is being paid a salary or wage via UNCW payroll; must be representing the university in an official capacity.
- ▶ Independent Contractor Travel – An individual invited to campus to participate in an event and will not receive pay or an honorarium, or a professional individual providing a service on a temporary/occasional basis.
- ▶ Non-Employee Travel – A prospective employee that is currently being recruited by UNCW or an employee of another governmental jurisdiction (local or federal). May also be athletic recruits and their family members.
- ▶ Student Travel – Student that is not on UNCW payroll; follows the policies and procedures of non-employee travel; may not be reimbursed from a general fund for incurred travel expenses.
- ▶ Student Employee Travel – Student that is on UNCW payroll; follows the policies and procedures of employee travel; is reimbursed by the same fund number they are paid from; must be representing the university in an official capacity.
- ▶ Student Group Travel – Travel when a UNCW faculty/staff member takes a group of students on a trip and covers all trip expenses for the students. Students may not be directly reimbursed for any expenses; may not be charged to general funds and must be on official university business.

Creating Pre-Approval Header

- Location
 - In-State
 - Out-of-State
 - International – Includes Alaska and Hawaii
- Destination City, State
- Country – If International is chosen
- Is this travel occurring in next fiscal year?
- Does this trip include personal time?

Travel Type

Location

Destination: City, State

Please note that Alaska and Hawaii are considered Foreign Travel and the location should be selected as International

Is this travel occurring in next fiscal year?

Does this trip include personal time?

Allocations

[+ Add Allocation](#)

Creating Pre-Approval Header

- Allocation – This is the funding source for the expense. Enter the fund that you want to charge the expense to.
- If you want to add multiple funds click on the + Add Allocation icon.
- When finished entering in the header information click on the save button at the top right corner.

Travel Type	-- Select --
Location	-- Select --
Destination: City, State	
Please note that Alaska and Hawaii are considered Foreign Travel and the location should be selected as International	
Is this travel occurring in next fiscal year?	<input type="checkbox"/>
Does this trip include personal time?	<input type="checkbox"/>
Allocations	
Search for Allocation	
+ Add Allocation	

Adding Additional Funds

- Click on the + Add Allocation icon.
- Two allocation fields will appear, with the first one populated at 100%.
- Enter the additional fund in the second line.
- Continue to add additional funds that are needed.
- By default, the expense will be split evenly among them.
- You can adjust by amount or by percentage.
- It is best to do this after all allocations have been added.

Allocations

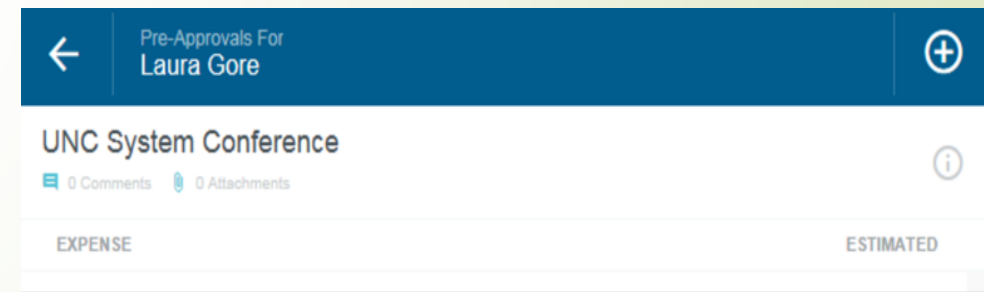
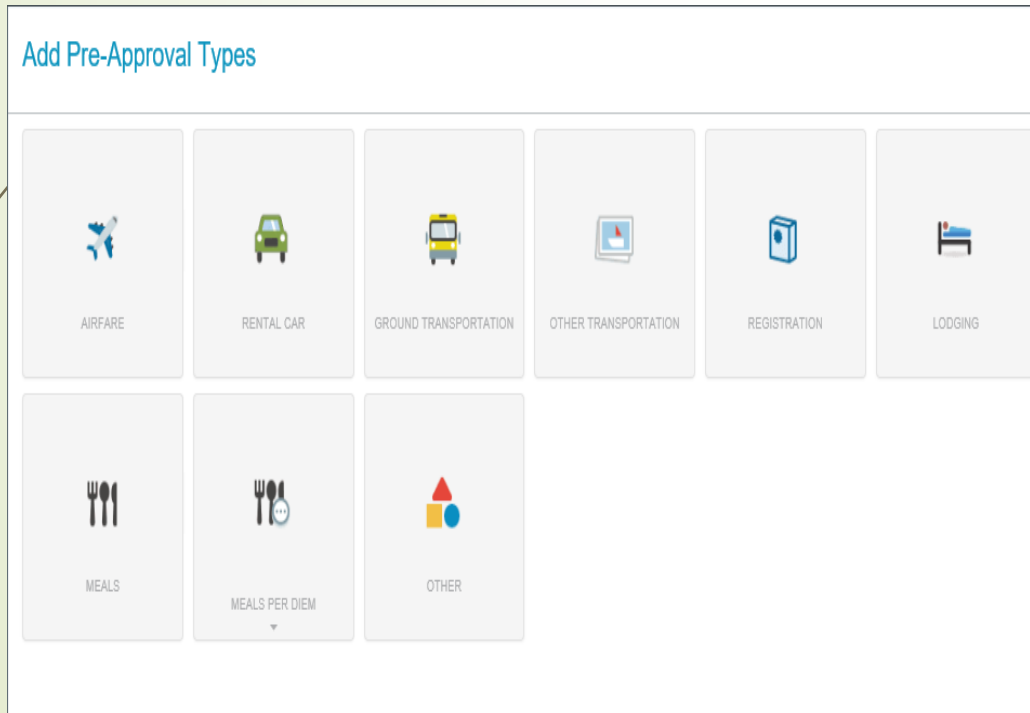
Split Equally Clear Splits

x	172000 Controller Accounting Department	50.00%	0.00	◀
x		50.00%	0.00	◀
	121C03 Biology and Marine Biology Admin Cost Share Fund for 572170	100.00%	0.00	▲
	125600 Cameron School Business External Department			▼

Adding Pre-Approval Expenses

Once the header page is saved the Pre-Approval Mosaic Dashboard screen will slide in from the right.










At any time you are able to remove or add the mosaic dashboard by clicking the + button at the top middle of the screen.



Pre-Approval – The Mosaic for Expense Types

Clicking on an expense type file takes you to a new screen to add the required information for that expense.

Add Pre-Approval Types

 AIRFARE	 RENTAL CAR	 GROUND TRANSPORTATION	 OTHER TRANSPORTATION	 REGISTRATION	 LODGING
 MEALS	 MEALS PER DIEM	 OTHER			

Airfare

- Enter estimated amount
 - If using a UNCW Travel Agency enter the amount quoted plus the agency fee.
- Travel Agency
 - Anthony Travel
 - Fellowship Travel
 - Maupin Travel
 - Other
- Paid By
 - Travel Card – If charging to your UNCW Travel Card.
 - Travel Office – If using a UNCW Travel Agency.
 - Traveler – If traveler pays and will be reimbursed after the trip.
- Enter Departure and Return Date
- Click on Save

Cancel Save

Airfare

Estimated Amount

If personal time is attached to the trip you will need to provide a comparison quote roundtrip from ILM to business destination from the same airfare provider on the business dates. If not flying from ILM, traveler must provide justification and comparison quote for round trip out of ILM. Please attach both of these to the PA when submitting.

Travel Agency

Paid By


Depart

Return

Airfare- Student Groups & Team Travel

- UNCW has contracted travel agencies that we use for airfare which is charged to the universities credit card.
 - If choosing to use a UNCW travel agency.
 - Select the travel agency.
 - Select Paid By – Travel Office
- A list of travelers should be added to the Description field or uploaded as an attachment.

Cancel Save

 Airfare

Estimated Amount

If personal time is attached to the trip you will need to provide a comparison quote roundtrip from ILM to business destination from the same airfare provider on the business dates. If not flying from ILM, traveler must provide justification and comparison quote for round trip out of ILM. Please attach both of these to the PA when submitting.

Description

If approval is for Student Group or Team Travel, please provide student names in Description Field above.

Travel Agency

Paid By

Depart

Return




Airfare - UNCW Travel Agencies

- If UNCW Travel Agency has been selected in the Paid By section these additional steps must be completed.
 - Travel Agency should have already been contacted and flight selected that you desire.
 - Attach the flight itinerary that the travel agency provided you to the pre-approval.
 - Submit the pre-approval for approval quickly as airfare is time sensitive.
 - Once all approvals have been received the travel agency will be given the approval to purchase the flight by the Travel Office.
- If there is personal time or flying out of a different airport than ILM a comparison quote must be attached to the pre-approval before submitting to the Travel Office.

Rental Car

- Enter the estimated amount.
- Enter description
- Select Car Rental Agency
- Paid By:
 - Travel Card – If charging to your UNCW Travel Card.
 - Travel Office – If using Enterprise Booking Tool.
 - Traveler – If traveler pays and will be reimbursed after the trip.
- Enter Depart and Return date
- Click and Save

Cancel Save

 **Rental Car**

Estimated Amount

Please decline collision damage waiver, supplemental liability insurance, roadside assistance or any other upgrades when renting a car for business travel. These expenses are not reimbursable. If booking the rental car by phone please reference our website for the state contract number.

Description Optional

Students cannot book rental cars on the state contract.

Car Rental Agency

Paid By

Depart

Return

Rental Car – Enterprise Direct Bill

- ▶ If you are using Enterprise and selected Travel Office as paid by make sure to use the Enterprise Booking Tool on the homepage and reserve the vehicle.
- ▶ You will need your Pre-Approval Report ID in order to complete your Enterprise registration. This is found at the bottom left hand side of the Pre-Approval.

Travel Agency & Rental Car Contact Information for Direct Bill

Enterprise College Road Location (910) 397-9110 [Enterprise Online Booking Tool](#)
Maupin Travel (800) 786-2738 [Maupin Online Booking Tool](#)
Fellowship Travel International (800) 235-9384 [Fellowship Online Booking Tool](#)


PA Report ID
010000246825

Total Estimated Amount
0.00 USD

Submit

Ground Transportation

- Ground transportation includes mileage, taxi, shuttle, fuel, and parking.
- Enter estimated amount.
 - This can be entered in separately for each expense or as a total.
- Enter Description – must be entered to identify expense type and needs to exceed five characters.
 - Example: Fuel for rental car
- Click on Save



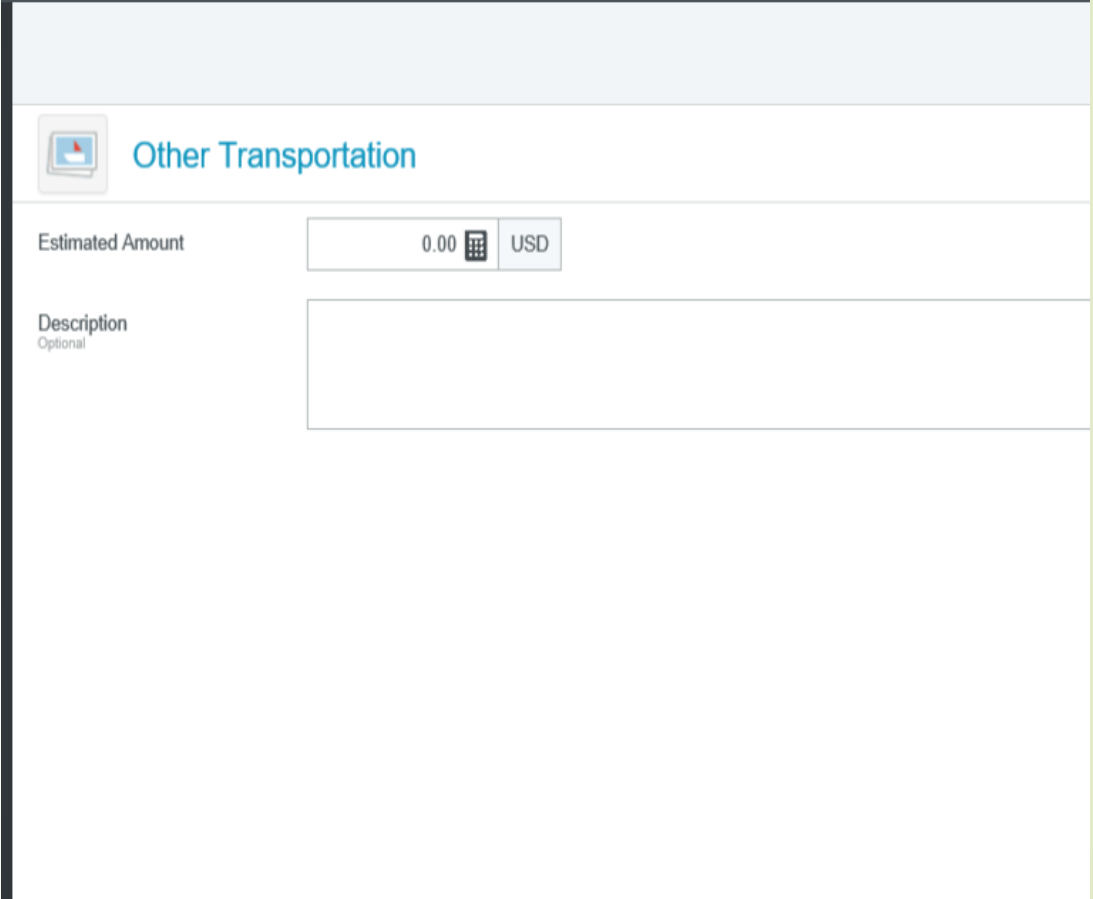
Ground Transportation

Estimated Amount



Description
Optional

Other Transportation

- Other transportation is considered a boat or ferry.
- Enter the estimated amount.
- Enter Description – enter to identify the expense type and needs to exceed five characters.
- Click on Save.

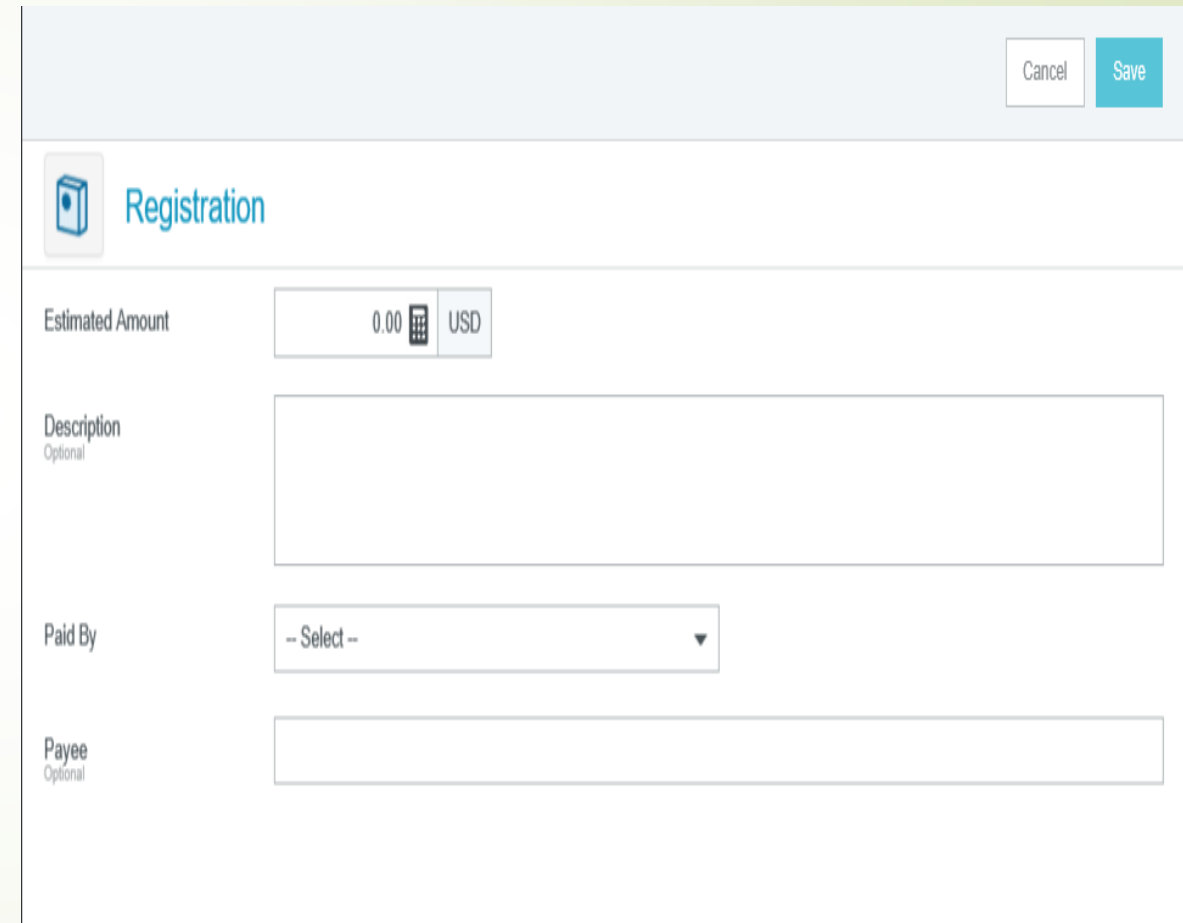


The screenshot shows a web form titled "Other Transportation". At the top left is a small icon of a boat. The form has two main input fields: "Estimated Amount" and "Description". The "Estimated Amount" field contains the value "0.00" and a currency selector set to "USD". The "Description" field is labeled "Optional" and is currently empty.

 Other Transportation	
Estimated Amount	0.00  USD
Description <small>Optional</small>	<input type="text"/>

Registration

- Enter the estimated amount.
- Enter a description of what the registration is for.
- Paid By:
 - Travel Card – If charging to your UNCW Travel Card.
 - Travel Office – If you are submitting an expense report for UNCW to pay directly.
 - Traveler – If traveler pays and will be reimbursed after the trip.
- Click on Save.




The screenshot shows a web form titled "Registration". At the top right, there are "Cancel" and "Save" buttons. The form fields are:

- Estimated Amount:** A text input field containing "0.00" with a calculator icon and "USD" to its right.
- Description:** A large text input field with the label "Description" and "Optional" below it.
- Paid By:** A dropdown menu with the text "-- Select --" and a downward arrow.
- Payee:** A text input field with the label "Payee" and "Optional" below it.

Lodging

- Enter the estimated amount.
- Enter Description – If planning on staying somewhere besides a regular hotel enter the information here and submit the 3rd party lodging request to the Travel Office before the trip.
- Enter the Number of Nights.
- Enter the Daily Rate.
- Approval Rate – Is the state per diem rate for lodging that is allowed. Any amount higher than this is considered excess lodging. You may not edit this field. Grey fields may not be edited.

 **Lodging**

Estimated Amount USD

Payment for lodging expenses can only be paid when the travel destination is located at least 35 miles from the employee's regular duty station or home, whichever is less. If the lodging rate exceeds the state per diem rate for lodging then prior approval by your supervisor is required along with justification. If staying anywhere besides a regular hotel 3rd party lodging approval must be completed before the trip. Please see the 3rd Party Lodging Procedures on our website.

Description
Optional

Number of Nights

Daily Rate

Approved Rate

Excess Lodging

Lodging

- Excess Lodging – This will be the dollar amount that is over the approved state rate.
- Paid By:
 - Travel Card – If using your UNCW Travel Card.
 - Travel Office – If charges will be payed by UNCW for local lodging.
 - Traveler – If traveler pays and will be reimbursed after the trip.
- Enter Hotel Name.
- Enter Check In and Check Out dates.
- Click and Save.

Approved Rate	<input type="text" value="79.3"/>
Excess Lodging	<input type="text" value="0.00"/>
Paid By	<input type="text" value="-- Select --"/>
Hotel Name <small>Optional</small>	<input type="text"/>
Check In	<input type="text" value=""/>
Check Out	<input type="text" value=""/>




Lodging – Local Hotel for Non-Employees

- ▶ Local Hotel arrangements made for Non-Employees or Independent Contractors must be entered on the Pre-Approval in order for them to be paid directly by UNCW.
- ▶ Steps to complete:
 - ▶ Contact the hotel from our local hotel list on the website.
 - ▶ Complete Pre-Approval with lodging marked as paid by Travel Office.
 - ▶ Must complete the Hotel Name field on the Pre-Approval for lodging and upload the reservation.
 - ▶ Once the pre-approval has been approved the Travel Office will provide the hotel with the authorization to direct bill UNCW.

Meals

- Typically this expense is used for Athletic meal advances and Student Groups.
- Enter the estimated amount.
 - Per Diem by day is listed at the bottom of the screen.
- Enter Description.
- Click on Save.

 **Meals**

Estimated Amount

Description

Reimbursement for meals is only allowable when the travel destination is located at least 35 miles from the traveler's regular duty station or home, whichever is less. If a meal is included as part of registration or Business Entertainment then the meal should not be claimed as per diem. Meal Eligibility is based on your specific departure and return dates and times on your travel preapproval and on the expense report. Below is the policy for meal eligibility.

Per State Policy 5.1.3 Meals Travel – Breakfast: must depart prior to 6:00 am; Lunch: must depart prior to noon or return after 2:00 pm; Dinner: depart prior to 5:00 pm or return after 8:00. For day trips you must extend your day by 2 hours for breakfast; no lunch per diem if travel does not involve an overnight stay; for dinner you have to extend your day by 3 hours and for breakfast and dinner you must extend your day by 5 hours. For more information please refer to <https://uncw.edu/travel>.

In State Rates: Breakfast \$8.40 Lunch \$11.00 Dinner \$18.90 Daily in state rate: \$38.30

Out of State Rates: Breakfast \$8.40 Lunch \$11.00 Dinner \$21.60 Daily out of state rate: \$41.00

For Foreign Rates please visit the US Department of State Website: https://aoprals.state.gov/content.asp?content_id

Meals Per Diem Wizard

- Select Meals Per Diem Wizard from the Meals Per Diem drop down.
- Start Date/Time and End Date/Time have populated from the information entered on the Pre-Approval Header Page.
- Days – Based on the Start and End Date. This field can not be edited.
- Enter Description
- Enter Location – The city and state or country you will be traveling to.
- Click on Add Entries at bottom of page.

Per Diem Wizard

Start Date	<input type="text" value="05/30/2019"/>	<input type="text" value="03:30"/>
End Date	<input type="text" value="05/30/2019"/>	<input type="text" value="05:00"/>
Days	<input type="text" value="1"/>	
Description <small>Optional</small>	<input type="text" value="Add Description"/>	
Location	<input type="text" value="Search for Location"/>	

Meals Per Diem Wizard

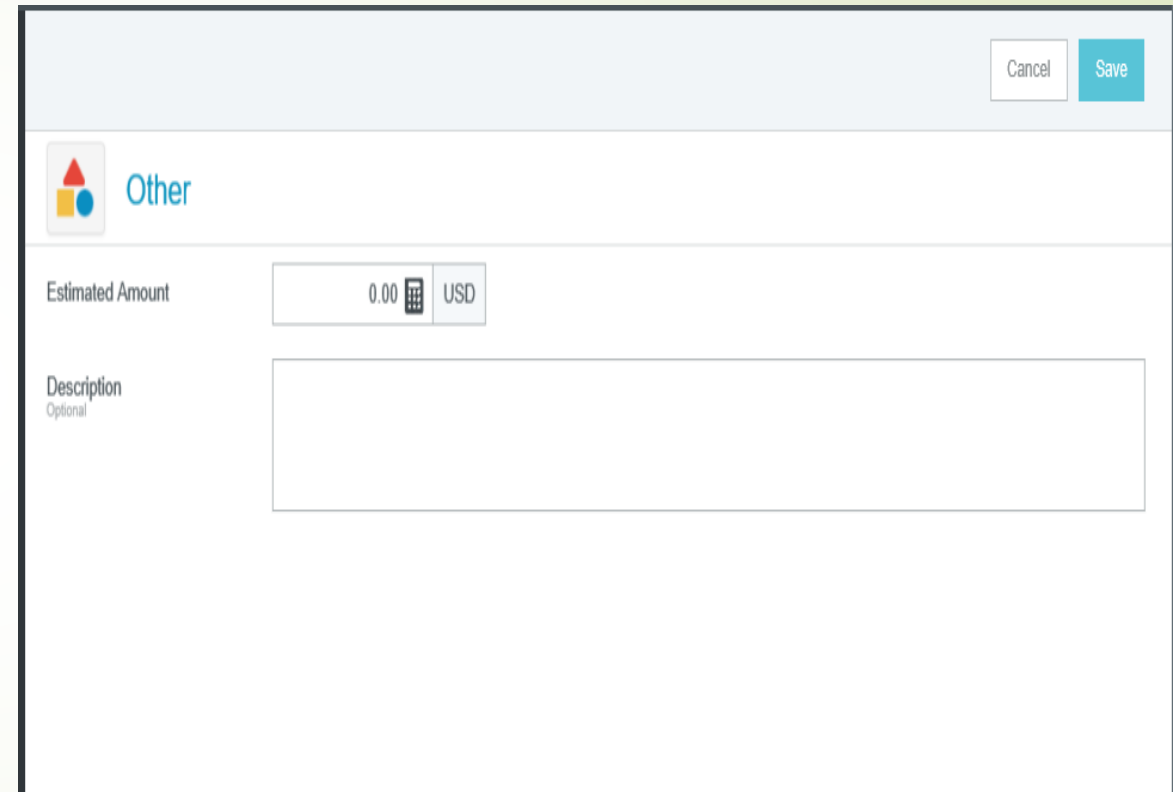
- Travel dates and total amount of per diems will appear on the right hand side of your screen.
- You may click on the arrow button to the right of the line item to be able to deduct meals.
- Click the box for meals that need to be deducted from the travel.
- You may click the X to the left of the line item if the entire day needs to be deducted.
- Click Add to Report.

DATE	LOCATION	AMOUNT
× Mon, 05/27/2019	Raleigh, North Carolina (NC),United States	19.40 USD ▾
Deductibles		
<input type="checkbox"/> Breakfast		
<input type="checkbox"/> Lunch		
<input checked="" type="checkbox"/> Dinner		
<input type="checkbox"/> Travel Day		
<input type="checkbox"/> Additional Deduction		
× Tue, 05/28/2019	Raleigh, North Carolina (NC),United States	38.30 USD >
× Wed, 05/29/2019	Raleigh, North Carolina (NC),United States	38.30 USD >
× Thu, 05/30/2019	Raleigh, North Carolina (NC),United States	0.00 USD >

Clear All Add to Report

Other

- Any travel expenses that do not belong in the other categories should be listed under other expenses.
- Enter the estimated amount.
- Enter Description – Should provide detail information on what type of expenses.
- Click on Save.



The screenshot shows a software interface for entering an expense. At the top right, there are 'Cancel' and 'Save' buttons. Below this is a header section with a small icon (a triangle and a circle) and the word 'Other'. The main form area contains two fields: 'Estimated Amount' with a value of '0.00' and a currency selector set to 'USD', and 'Description' with a large empty text box. The 'Description' label is followed by the word 'Optional' in a smaller font.

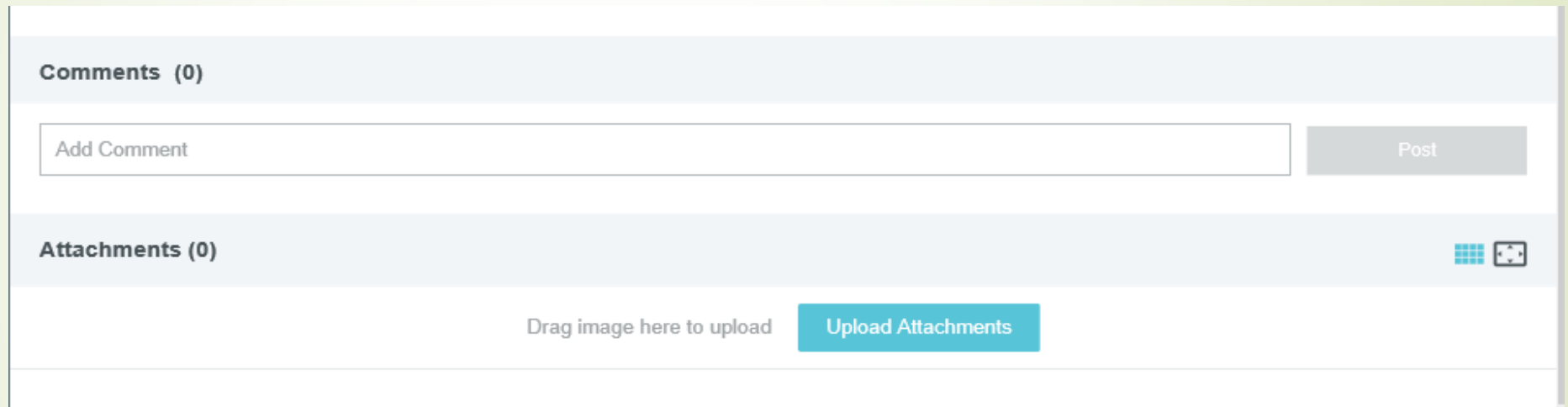
Attaching Images and Adding Comments to the Pre-Approval

- You can attach images and add comments to a pre-approval while you are creating it or at any stage after it has been created.
- You will need to be on the Pre-Approval Header Preview page to be able to attach an image or add a comment to the report.
- Select report from your Draft or Submitted Pre-Approvals on the right hand side of the screen to view the Header Preview.

Submitted Pre-Approvals		
Cascade Conference 2019 010000625249	03/06/2019	1,804.60 USD PARTIALLY APPLIED

Attaching Images and Adding Comments to the Pre-Approval

- Add comments to the comment section and click on Post.



The screenshot displays a user interface for adding comments and attachments. It features a light blue header for the 'Comments (0)' section, followed by a text input field with the placeholder 'Add Comment' and a grey 'Post' button. Below this is another light blue header for the 'Attachments (0)' section, which includes a grid icon and a plus icon. At the bottom, there is a white area with the text 'Drag image here to upload' and a teal 'Upload Attachments' button.

- To attach images, tap on Upload Attachments then browse file to attach an image from your computer.
- You may also drag and drop your image from your computer in the labeled area.

Submitting a Pre-Approval

- After reviewing the pre-approval and information is correct, click the green submit button.

PA Report ID 010000687516	Total Estimated Amount 126.00 USD	Submit
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- If the pre-approval request is not already open, go to your Draft Pre-Approvals screen, click on the desired request and click Submit on the preview screen.
- You will be asked to verify the legitimacy of your pre-approval request on the Submit Confirmation screen by clicking Submit.

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