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.
Creating Pre-Approval Header

- Pre-Approvals are only required for Travel Expenses.
- Click on the + New icon on the top right side.
- Select New Pre-Approval Report
- The Pre-Approval Header will appear.
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.
Creating Pre-Approval Header

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

<table>
<thead>
<tr>
<th>Pay Me In</th>
<th>USD - US Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Purpose</td>
<td></td>
</tr>
<tr>
<td>Starting Time</td>
<td>- Select --</td>
</tr>
<tr>
<td>Ending Time</td>
<td>- Select --</td>
</tr>
<tr>
<td>Travel Type</td>
<td>- Select --</td>
</tr>
<tr>
<td>Location</td>
<td>- Select --</td>
</tr>
<tr>
<td>Destination: City, State</td>
<td></td>
</tr>
</tbody>
</table>
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?
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.
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.
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 tile takes you to a new screen to add the required information for that expense.
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
Airfare - Student Groups & Team Travel

- UNCW has contracted travel agencies that we use for airfare which is charged to the university's 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.
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
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.
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
Other Transportation

- Other transportation is boat or ferry
- Enter the estimated amount
- Enter Description – enter to identify the expense type and needs to exceed five characters.
- Click on Save
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
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 that this is considered excess lodging. You may not edit this field. Grey fields may not be edited.
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
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.
  - 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 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.
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
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
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

<table>
<thead>
<tr>
<th>Cascade Conference 2019</th>
<th>03/06/2019</th>
<th>1,804.60 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000000023249</td>
<td></td>
<td>PARTIALLY APPLIED</td>
</tr>
</tbody>
</table>
Attaching Images and Adding Comments to the Pre-Approval

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

- 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.