

Instructions for Faculty Development Committee Grant Awardees

Chrome River will be **required** for employee expense reimbursements and Chrome River pre-approval is **required** on all travel, technology purchases of hardware and software, gift cards, and donation expenditures. Finally, all travel – including flights, hotels, rental cars, and trains – will need to be booked through Christopherson Travel.

The instructions below will guide you through 1) the pre-approval process, 2) booking travel through Christopherson, and 3) processing expense reimbursements.

The Basics

1. Once you receive approval of your FDC grant (which will come from Sally: solaughl@regis.edu) you are required to submit a **pre-approval** request through Chrome River only if you are using FDC/University funds to purchase travel, technology, gift cards, or donations. *Note: any travel need to be booked through Christopherson (see Part B).*
2. If FDC/University funds are being used for purchases other than those listed above, no pre-approval is needed – skip straight to Part C for reimbursement.

A. Pre-Approval Process:

1. See Appendix A for step-by-step instructions on how to submit a pre-approval request.
2. This pre-approval will be reviewed by the **FDCs budget manager and/or Dean** who will approve the appropriate allowable funds.
3. This pre-approval will be stored in Chrome River – so no need to keep a separate record yourself – and will be available/required to upload when requesting reimbursement.

B. Christopherson Travel

1. See Appendix B for instructions on how to book travel through Christopherson Travel.

Note: if using Christopherson Travel customer service this must be done during business hours or they will add an off hours surcharge.

C. Reimbursement using receipts with or without pre-approval:

Note: this does not apply to any faculty/staff who are P-card holders and have booked/paid using the P-card, as that process is a reconciliation and not a reimbursement, and is managed separately

1. See Appendix C for step-by-step instructions on how to submit an expense reimbursement request.
2. Once submitted, this will be reviewed by the FDCs budget manager and/or Dean who will approve the appropriate allowable funds from the grant received.

Notes & Resources

-Recorded Trainings for *Christopherson Travel*, *Chrome River Pcard*, and *Chrome River Expense* can be found [here](#).

-The PowerPoint for Chrome River Employee Expense, Pre-Approval, SNAP App, and Per Diem can be found [here](#).

-The PowerPoint for Chrome River Pcard can be found [here](#).

Appendix A

Chrome River: Pre-Approval Process

****This applies to: travel, ITS-related purchases, donations, gift cards****

****Pre-approval needs to be requested AND approved prior to any purchases or bookings****

1. Access Chrome River through Office365 application page.



Chrome River

2. In the Pre-Approval box, select “+Create.”

The screenshot shows the Chrome River application interface. At the top, there is a navigation bar with a search bar containing 'chromeriver', a user profile for 'James Maniscalco', and a help icon. Below the navigation bar, there are four main sections: 'eWallet' (Unused Items: 0 Credit Card Items, 2 Receipts), 'Expenses' (1 Returned, 1 Submitted Last 90 Days), 'Pre-Approval' (0 Draft, 0 Returned, 1 Submitted Last 90 Days, with the '+ Create' button circled in red), and 'Invoices' (0 Draft, 0 Submitted Last 90 Days). To the right of the sections, there is a 'Welcome to Chrome River' message, contact information for PCard Support, US Bank 24 hour support-Credit Card Support, and Accounts Payable Specialist, and notices about mobile device access and emailing receipts.

3. Name your report, add start/end dates, identify business purpose, and indicate whether you are charging a department/committee code outside your department (this will commonly be the case). Then choose how to allocate the anticipated cost for pre-approved item. Cost can be allocated to a single department/committee or split between multiple equally or otherwise (see “+ Add Allocation” button below).

Budget codes are searchable by keyword (see codes selected below for examples), and if a portion of the cost will be paid by you personally, you can indicate this specifically (see red circle below). *Note: budget allocations should be split by percentage – as splitting by dollars doesn't seem to work – see columns on far right.*

Appendix A



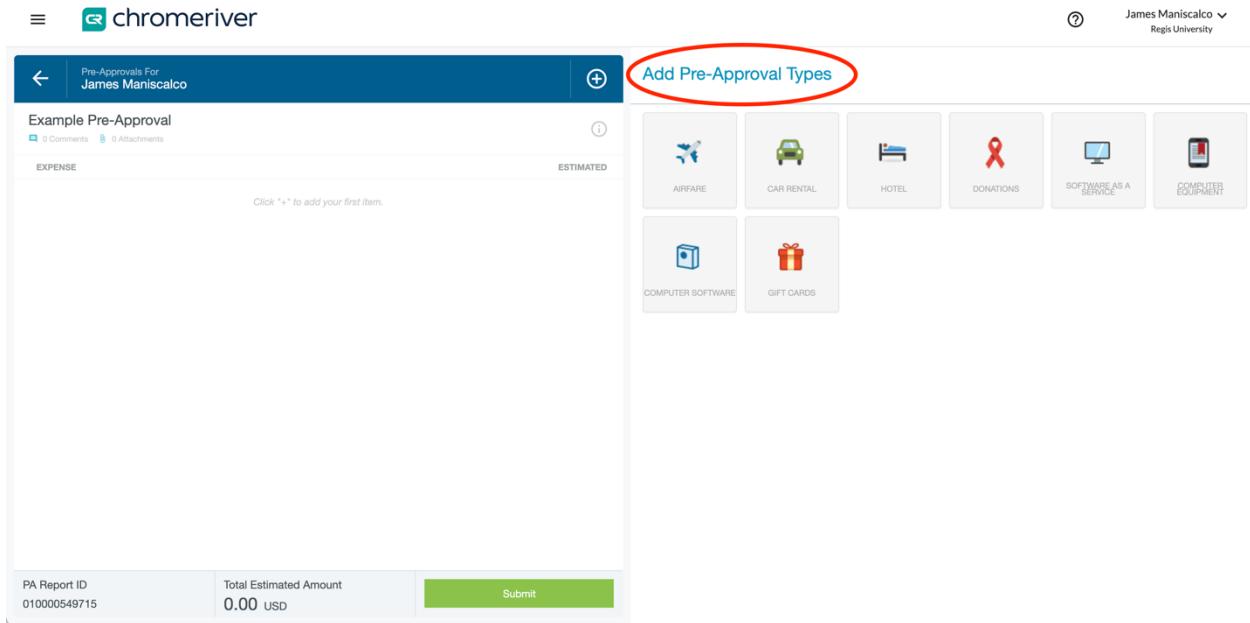
Pre-Approvals For James Maniscalco

Report Name	Example Pre-Approval		
Start Date	09/27/2021		
End Date	09/28/2021		
Number of Days	2		
Pay Me In	USD - US Dollars		
Business Purpose	Hotel Stay for Work Travel		
Fiscal Year	FY22		
Are you charging a budget code outside of your Dept?	<input type="checkbox"/>		
Please search by typing the name or number of the FUND, DEPT or ACTV			
Allocations			
<div style="text-align: right;">Split Equally Clear Splits</div>			
	10-000-106160-0000 10 - General 106160 - RC UG Psychology / 0000 - General Activity	33.34 %	0.00
	10-000-100000-0000 10-General Operating Budget 100000-RC Dean / 0000-General Ac...	33.33 %	0.00
	PERSONAL Non-Reimbursable Personal Expense	33.33 %	0.00

4. Click “Save” – you have just created your pre-approval report, which can include a single or multiple line items.

Appendix A

5. Add all applicable pre-approval items to the request.



Pre-Approvals For James Maniscalco

Add Pre-Approval Types

Example Pre-Approval

EXPENSE

ESTIMATED

Click "+" to add your first item.

AIRFARE

CAR RENTAL

HOTEL

DONATIONS

SOFTWARE AS A SERVICE

COMPUTER EQUIPMENT

COMPUTER SOFTWARE

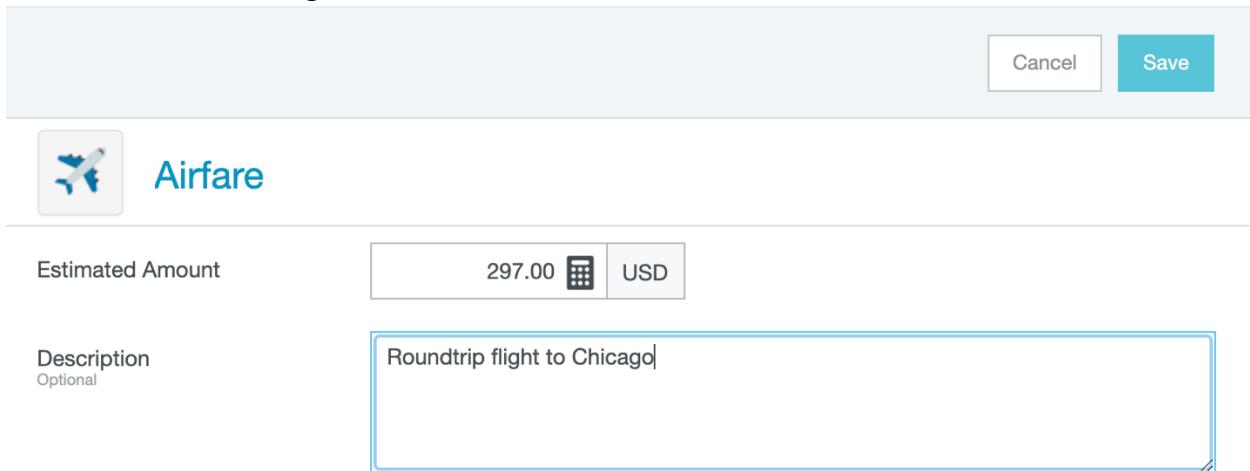
GIFT CARDS

PA Report ID: 010000549715

Total Estimated Amount: 0.00 USD

Submit

6. Example flight selection – this estimate should be based on your own independent research into flight costs.



Airfare

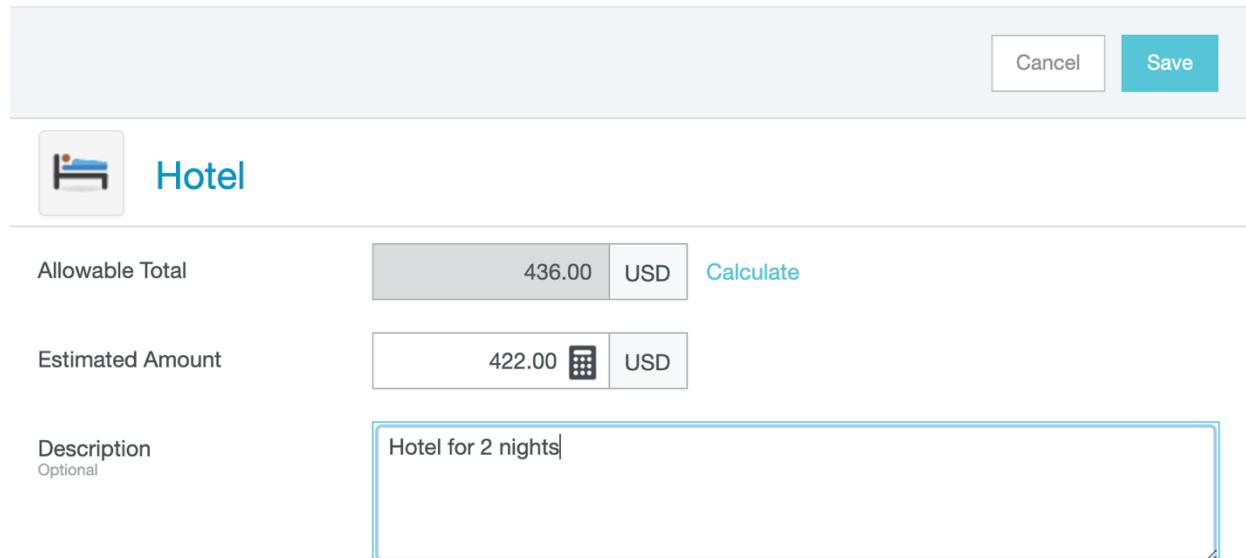
Estimated Amount: 297.00 USD

Description: Roundtrip flight to Chicago

Cancel Save

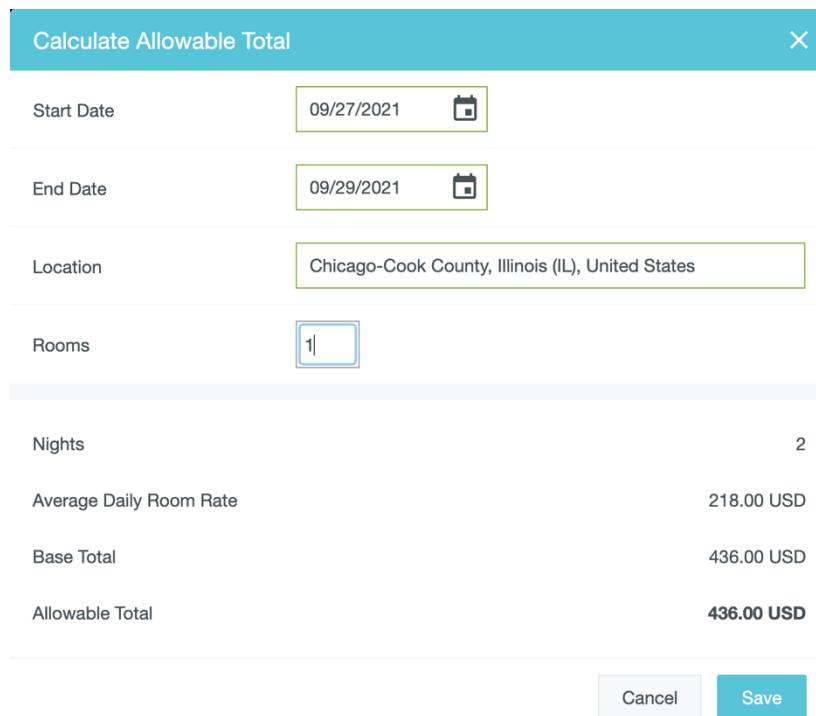
Appendix A

7. Example hotel selection – note: your hotel cost will need to stay within an “allowable total” that is calculated based on stay duration, number of rooms, and location (see example below).



The interface shows a hotel selection screen with a "Cancel" and "Save" button at the top right. Below is a logo of a bed and the word "Hotel". The "Allowable Total" is set to 436.00 USD. The "Estimated Amount" is 422.00 USD. The "Description" field contains "Hotel for 2 nights".

Allowable Total	436.00	USD	Calculate
Estimated Amount	422.00		USD
Description Optional	Hotel for 2 nights		

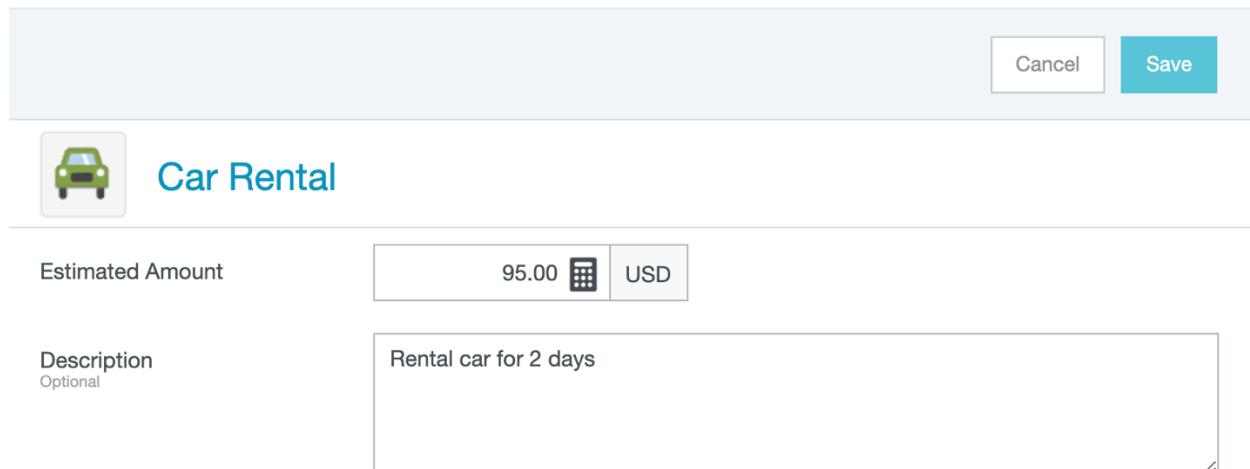


A modal dialog titled "Calculate Allowable Total" with an "X" button at the top right. It contains fields for "Start Date" (09/27/2021), "End Date" (09/29/2021), "Location" (Chicago-Cook County, Illinois (IL), United States), and "Rooms" (1). Below these are summary values: "Nights" (2), "Average Daily Room Rate" (218.00 USD), "Base Total" (436.00 USD), and "Allowable Total" (436.00 USD). At the bottom are "Cancel" and "Save" buttons.

Start Date	09/27/2021	
End Date	09/29/2021	
Location	Chicago-Cook County, Illinois (IL), United States	
Rooms	1	
Nights	2	
Average Daily Room Rate	218.00 USD	
Base Total	436.00 USD	
Allowable Total	436.00 USD	

Appendix A

8. Rental car example - this estimate should be based on your own independent research into rental car costs.



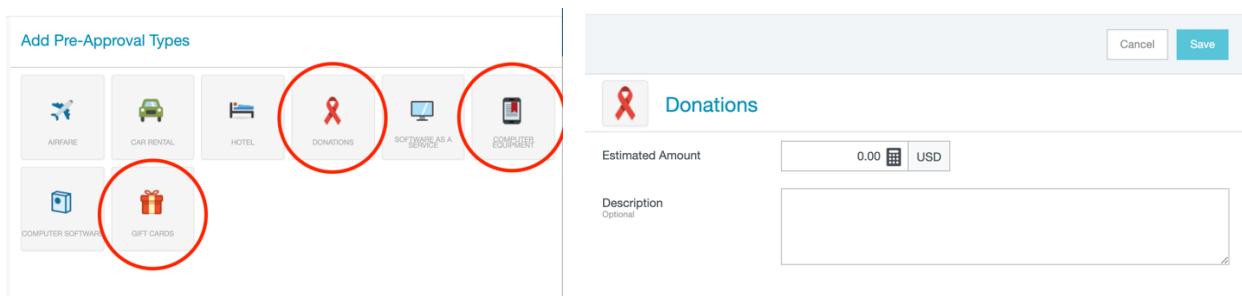
Car Rental

Estimated Amount: 95.00 USD

Description: Rental car for 2 days

Save Cancel

9. For gift cards, donations, or ITS-related expenses, simply enter the cost amount and a brief description.



Add Pre-Approval Types

AIRFARE CAR RENTAL HOTEL DONATIONS SOFTWARE AS A SERVICE COMPUTER EQUIPMENT

COMPUTER SOFTWARE GIFT CARDS

Donations

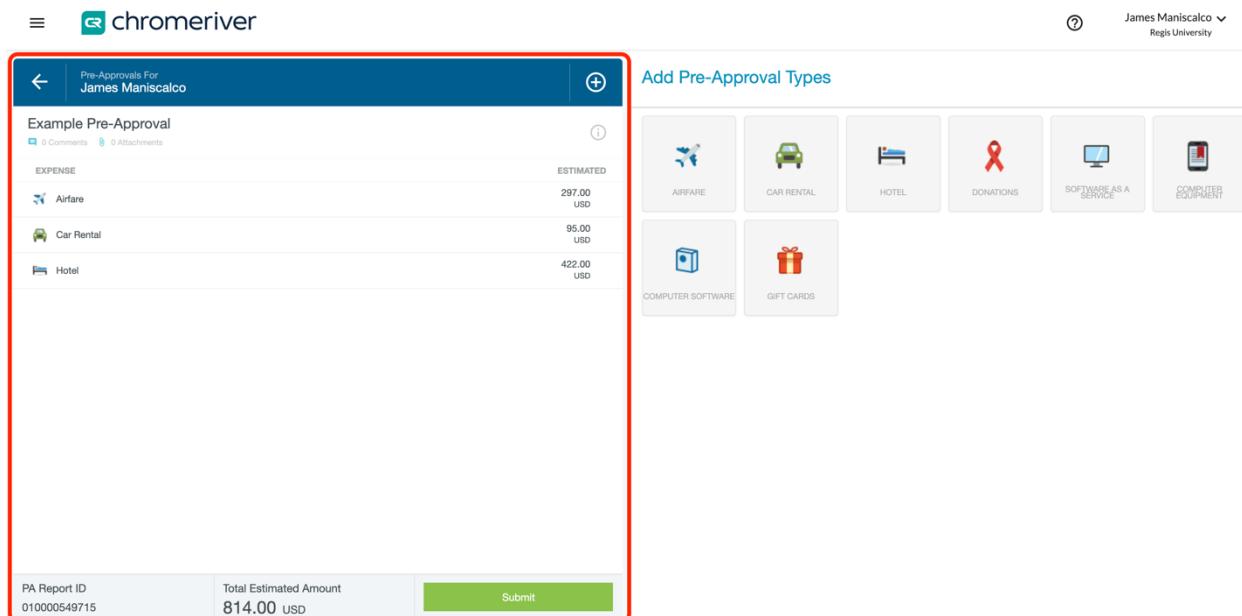
Estimated Amount: 0.00 USD

Description: Optional

Save Cancel

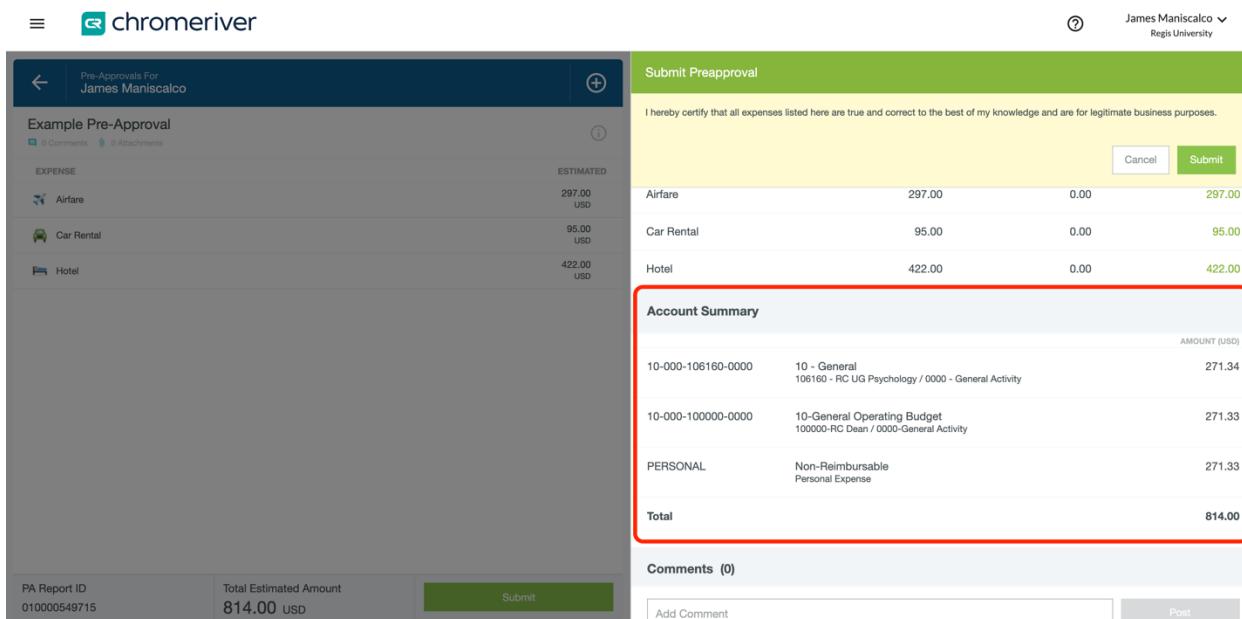
Appendix A

10. After all items have been added to the pre-approval request, you can see the line item summary as well as total estimated cost on the left side of the screen.



The screenshot shows the 'Pre-Approvals For James Maniscalco' page. On the left, a red box highlights the 'Example Pre-Approval' section, which lists three items: Airfare (297.00 USD), Car Rental (95.00 USD), and Hotel (422.00 USD). On the right, a sidebar titled 'Add Pre-Approval Types' lists categories with icons: AIRFARE, CAR RENTAL, HOTEL, DONATIONS, SOFTWARE AS A SERVICE, COMPUTER EQUIPMENT, COMPUTER SOFTWARE, and GIFT CARDS. At the bottom, the PA Report ID is 010000549715, the Total Estimated Amount is 814.00 USD, and there is a green 'Submit' button.

11. Click “submit” – then review your pre-approval report details on right side of the screen. Make sure to review/check all details, in particular, ensure the budget accounts are correct (see red box below) and have the right dollar amount allocated to each.



The screenshot shows the 'Submit Preapproval' page. On the left, the 'Example Pre-Approval' table is identical to the previous screenshot. On the right, a green box highlights the 'Account Summary' table. This table shows budget accounts with their descriptions and amounts: 10-000-106160-0000 (10 - General, 106160 - RC UG Psychology / 0000 - General Activity) with an amount of 271.34; 10-000-100000-0000 (10-General Operating Budget, 100000-RC Dean / 0000-General Activity) with an amount of 271.33; and PERSONAL (Non-Reimbursable Personal Expense) with an amount of 271.33. The total amount is 814.00. At the bottom, there is a 'Comments (0)' section with an 'Add Comment' input and a 'Post' button.

Appendix A

12. If all looks correct, click “Submit.” That’s it! Pre-approval will be directed to appropriate supervisor, department chair, committee administrator, etc., for approval in Chrome River.
13. Once items are pre-approved you will receive a notification and it is okay to book/purchase items. When submitting reimbursements, you will be asked for the pre-approval confirmation in order to process. *The pre-approval will be stored in Chrome River, so there will be no need to upload when processing expense reimbursements.*

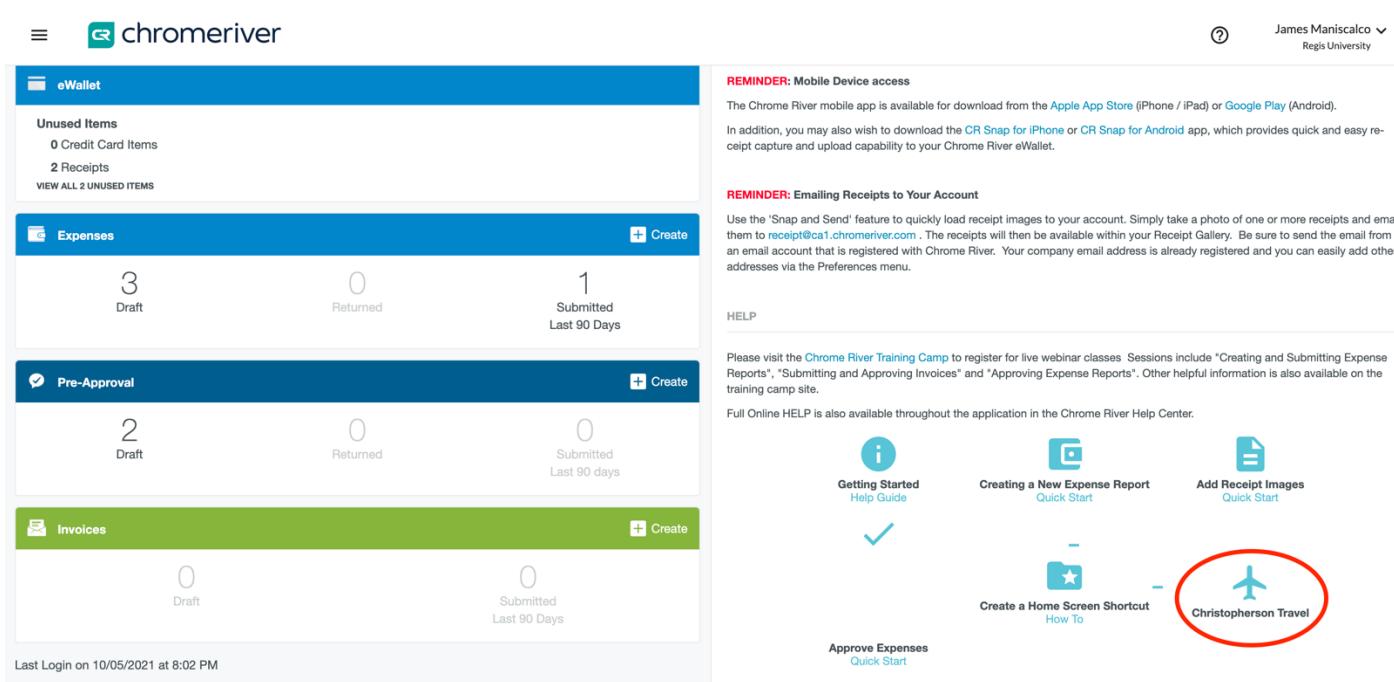
Appendix B

Christopherson Travel

Starting immediately, all travel (air, rental car, train, and hotel) needs to be booked through Christopherson Travel. Christopherson can be accessed through Chrome River on the very bottom right of the screen (you'll need to scroll down to see it).

Upon use for the first time, you will need to select “forgot password” to set up a new password associated with your Regis account (Christopherson will send you an email with a link to set up a new password).

Please contact Theresa Neuroth (tneuroth@regis.edu) with any questions or for assistance using this service. Note: Christopherson has assured us their rates are competitive, so please notify Theresa if there is a pricing discrepancy in which Christopherson does not offer a comparable price for bookings (this has not been the case during initial use).



The screenshot shows the Chrome River application interface. At the top, there is a navigation bar with a menu icon, the 'chromeriver' logo, and a user profile for 'James Maniscalco' (Regis University). The main content area is divided into several sections:

- eWallet**: Shows 0 Credit Card Items and 2 Receipts. A 'VIEW ALL 2 UNUSED ITEMS' button is present.
- Expenses**: Shows 3 Draft items, 0 Returned items, and 1 Submitted item (Last 90 Days). A '+ Create' button is available.
- Pre-Approval**: Shows 2 Draft items, 0 Returned items, and 0 Submitted items (Last 90 days). A '+ Create' button is available.
- Invoices**: Shows 0 Draft items and 0 Submitted items (Last 90 Days). A '+ Create' button is available.

At the bottom left, a message indicates 'Last Login on 10/05/2021 at 8:02 PM'.

On the right side, there are several informational sections and links:

- REMINDER: Mobile Device access**: Instructions for downloading the Chrome River mobile app from the App Store or Google Play.
- REMINDER: Emailing Receipts to Your Account**: Instructions for using the 'Snap and Send' feature to quickly load receipt images to the account.
- HELP**: A link to the Chrome River Training Camp and the Help Center.
- Quick Start Links**: Includes 'Getting Started Help Guide', 'Creating a New Expense Report Quick Start', 'Add Receipt Images Quick Start', 'Approve Expenses Quick Start', and 'Create a Home Screen Shortcut How To'. The 'Christopherson Travel' link is highlighted with a red oval.

Appendix C

Chrome River: Expense Reimbursement Process

****This process applies for all expenses, i.e. those that were pre-approved as well as those that did not need pre-approval****

1. Access Chrome River through Office365 application page



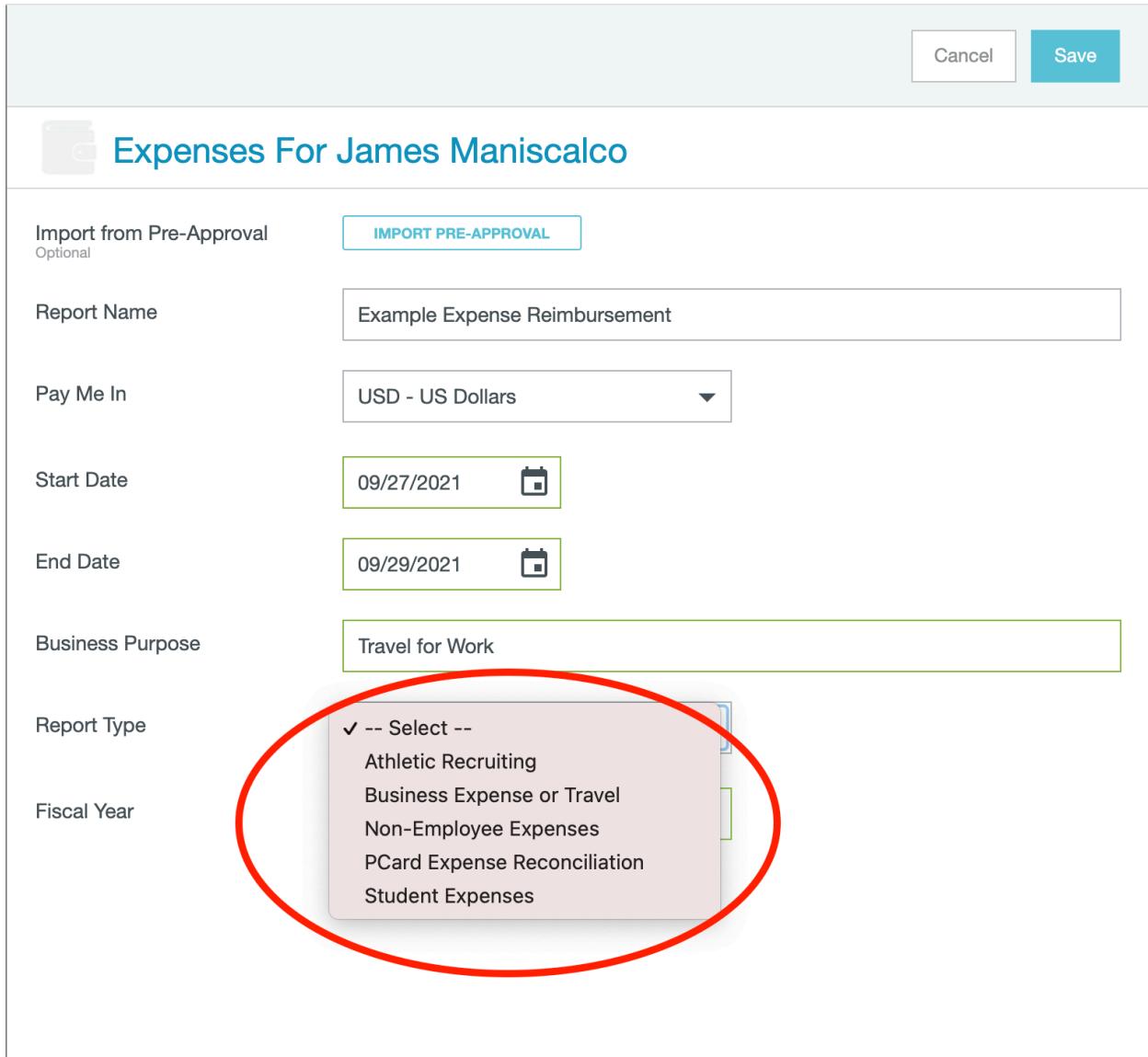
Chrome River

2. In the Expense box, select “+Create”

The screenshot shows the Chrome River application interface. At the top, there is a header with the 'eWallet' tab selected. Below the header, there are sections for 'Unused Items' (0 Credit Card Items, 2 Receipts, 'VIEW ALL 2 UNUSED ITEMS'), 'eWallet' (0 Draft, 0 Returned, 1 Submitted Last 90 Days), 'Expenses' (0 Draft, 0 Returned, 1 Submitted Last 90 Days), 'Pre-Approval' (0 Draft, 0 Returned, 0 Submitted Last 90 days), and 'Invoices' (0 Draft, 0 Submitted Last 90 days). A red circle highlights the '+ Create' button in the 'Expenses' section. On the right side of the screen, there is a 'Welcome to Chrome River, Regis University's new Expense, Pcard and Invoice Software' message, contact information for PCard Support, US Bank 24 hour support-Credit Card Support, and Accounts Payable Specialist, and notices about mobile device access and emailing receipts.

Appendix C

3. Enter report name, dates, purpose, and select the report type (most reports will be “Business Expense or Travel”):

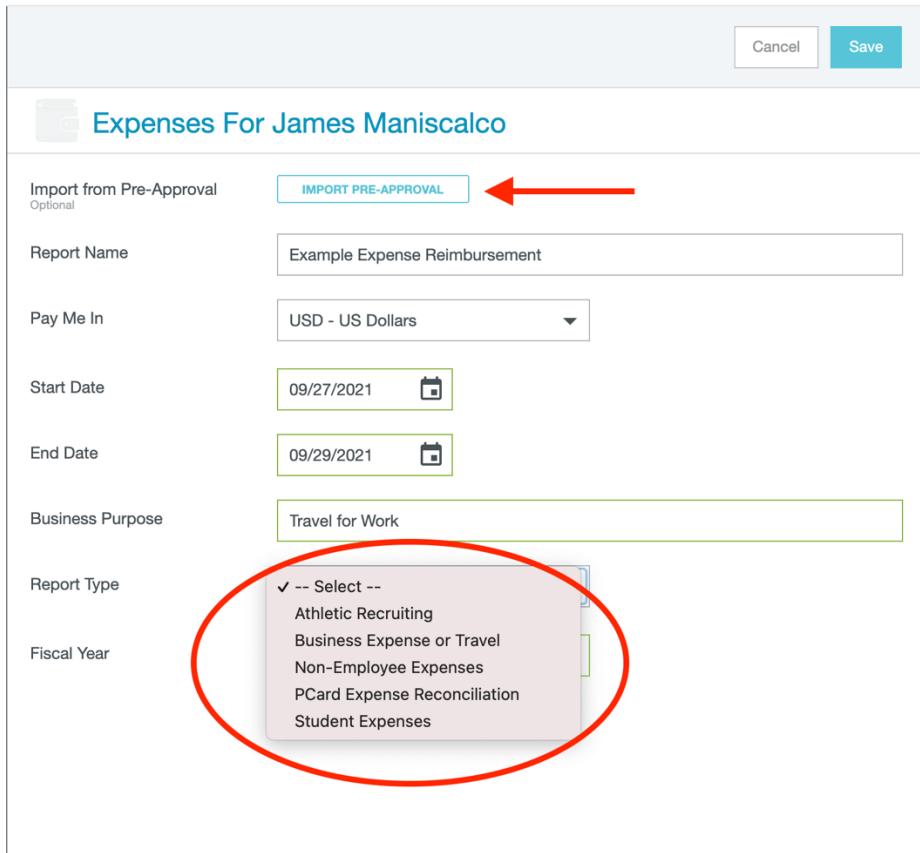


The screenshot shows a user interface for creating a report. At the top right are 'Cancel' and 'Save' buttons. Below is the title 'Expenses For James Maniscalco' with a document icon. The form fields include:

- Import from Pre-Approval** (Optional) with an 'IMPORT PRE-APPROVAL' button.
- Report Name**: Example Expense Reimbursement.
- Pay Me In**: USD - US Dollars.
- Start Date**: 09/27/2021.
- End Date**: 09/29/2021.
- Business Purpose**: Travel for Work.
- Report Type**: A dropdown menu with a red circle around it, showing the following options:
 - ✓ -- Select --
 - Athletic Recruiting
 - Business Expense or Travel
 - Non-Employee Expenses
 - PCard Expense Reconciliation
 - Student Expenses
- Fiscal Year**: (Field is empty)

Appendix C

4. **If applicable**, select “import pre-approval” to import a pre-approval for travel, ITS-related, gift card, or donation reimbursements (see arrow below):



Expenses For James Maniscalco

Import from Pre-Approval
Optional

Report Name: Example Expense Reimbursement

Pay Me In: USD - US Dollars

Start Date: 09/27/2021

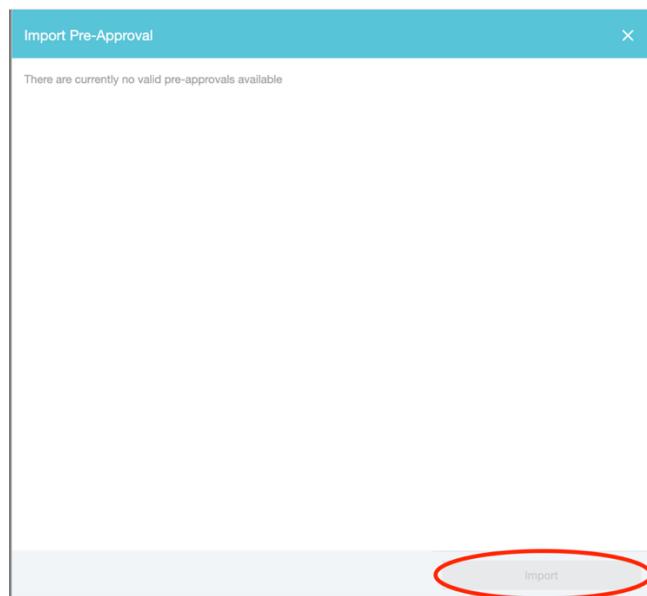
End Date: 09/29/2021

Business Purpose: Travel for Work

Report Type: **✓ -- Select --**
Athletic Recruiting
Business Expense or Travel
Non-Employee Expenses
PCard Expense Reconciliation
Student Expenses

Cancel Save

5. This will take you to a list of all current pre-approvals. Select the applicable pre-approval(s) and select “import.”



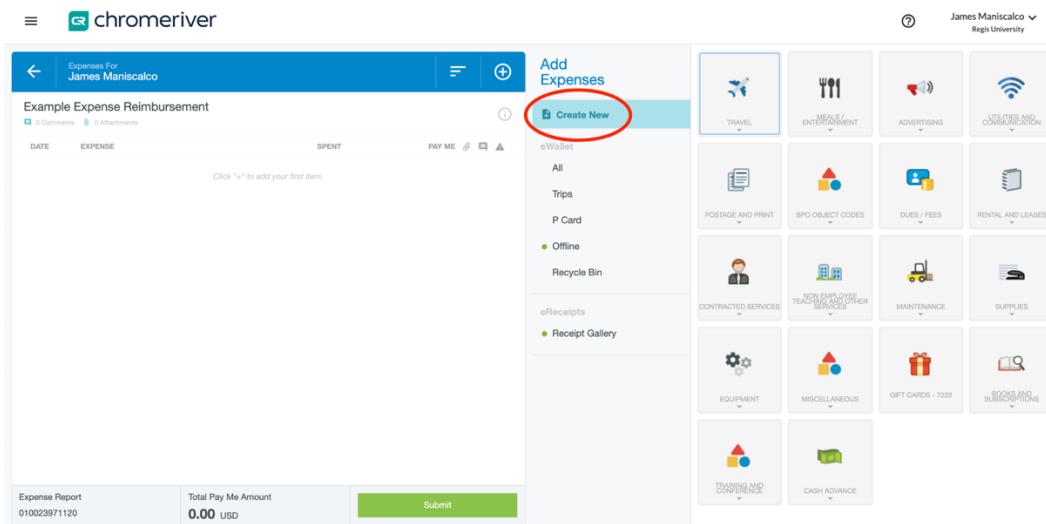
Import Pre-Approval X

There are currently no valid pre-approvals available

Import

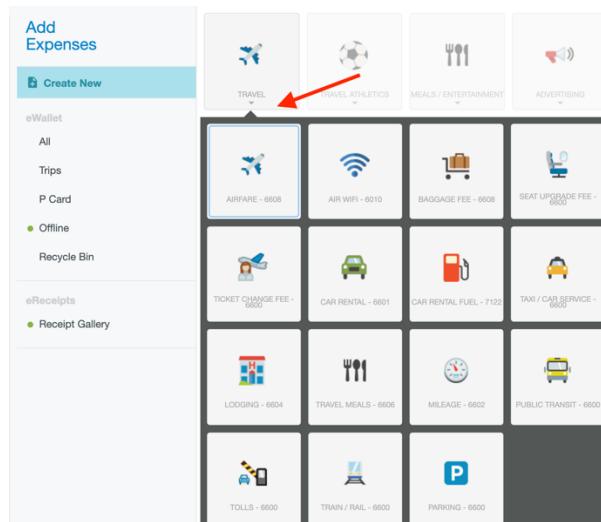
Appendix C

6. Click “save”
7. To add an expense to the report, select “Create New” (Note: you may need to click the circled “+” sign to the upper left of the red circle in the image below if the expense options are not showing).



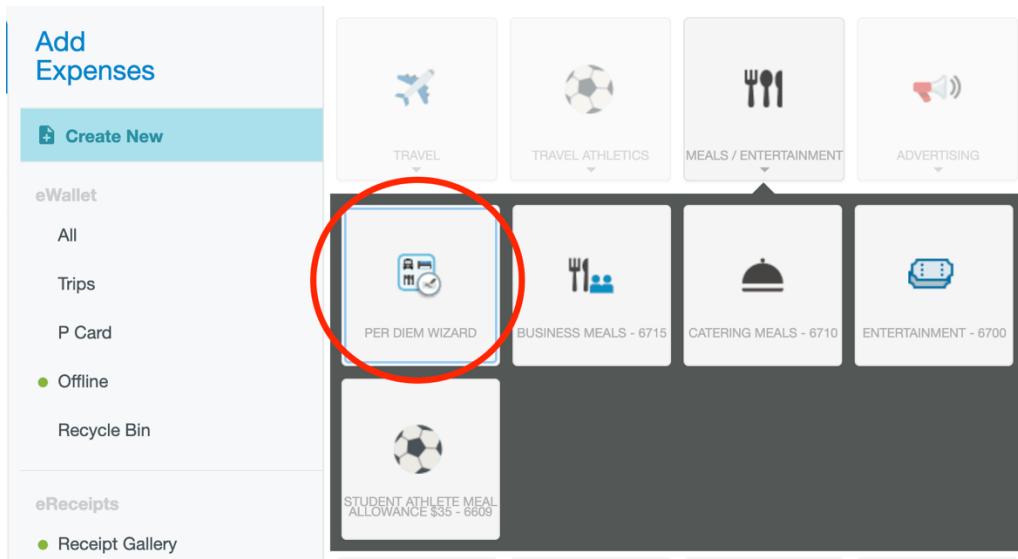
8. Add expenses – including all relevant pre-approved and not pre-approved items – to your reimbursement report. Note, the icons with a small downward facing arrow on the bottom of the box (e.g., travel) have a dropdown menu with additional options.

Chrome River will require receipt uploads for certain items, so be sure to have electronic copies, screenshots, or pictures of these ready to upload.

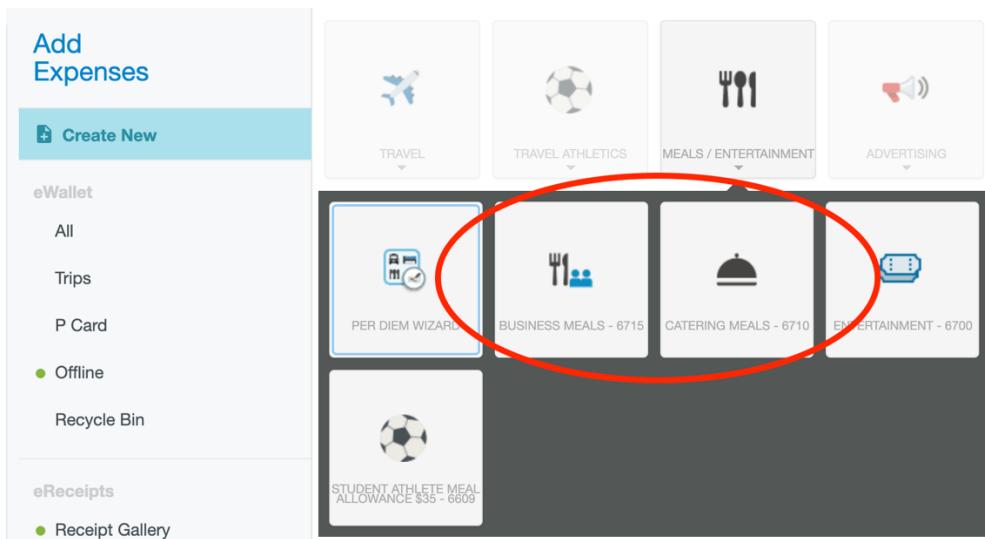


Appendix C

Note: per diem requests can be found under “Meals/Entertainment”.

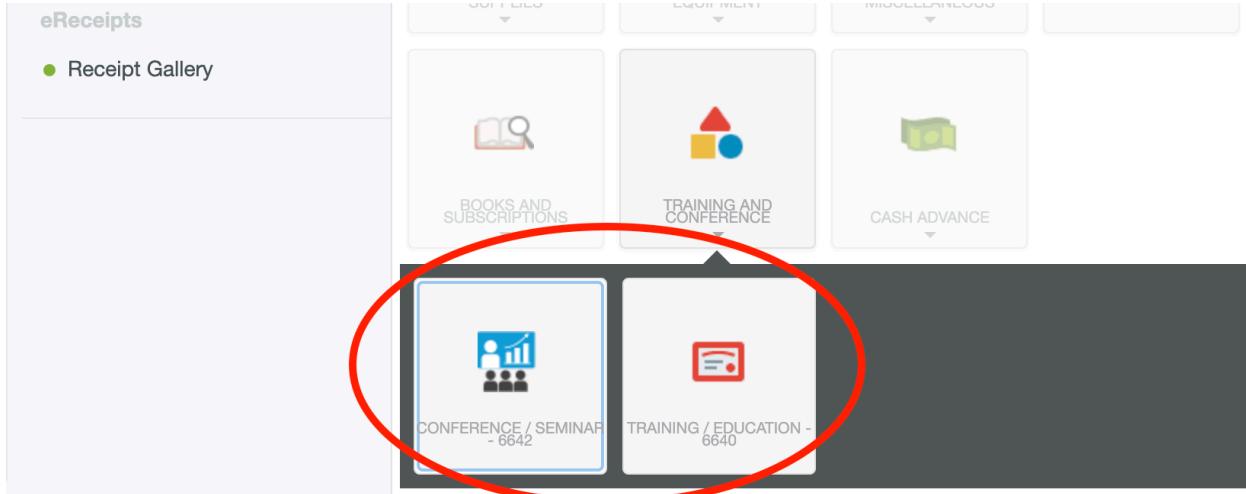


Note: **Business Meals** are for small groups (think: group dinner at a conference), and each individual in attendance will need to be listed (including name, affiliation, and title), including any non-Regis attendees. Conversely, **Catering** should be used for on-campus Regis events in which larger groups are invited (think: student pizza party) and no names will be needed for the reimbursement.

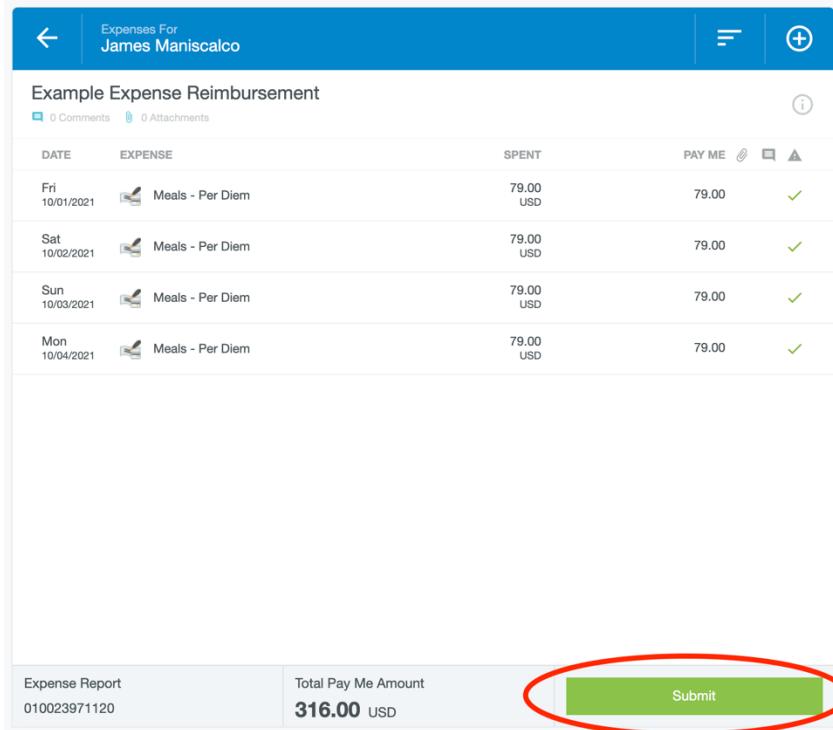


Appendix C

Note: **Conference, Training, or Education** expenses (e.g., registration, abstract submission, program fees, etc.) can be logged under the “Training & Conference” button at the bottom of the expense options.



9. Once all relevant expenses have been added, click “Submit.”



Appendix C

10. Review your reimbursement report details on right side of the screen. Make sure to review/check all details, in particular, ensure the budget accounts are correct (see red box below) and have the right dollar amount allocated to each. Then click “submit.”

Submit Confirmation

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

PDF ▾ Cancel Pre-Approval Submit

Meals - Per Diem	316.00	0.00
Total	316.00	0.00

Account Summary

	AMOUNT (USD)	APPROVED (USD)	
10-000-100000-0000	10-General Operating Budget 100000-RC Dean / 0000-General Activity	316.00	0.00
Totals	316.00	0.00	

Attachments (0)  