

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: soaughl@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 web application interface. The left sidebar contains a navigation menu with the following sections:

- eWallet**: 0 Credit Card Items, 2 Receipts, VIEW ALL 2 UNUSED ITEMS
- Expenses**: 0 Draft, 1 Returned, 1 Submitted Last 90 Days, + Create
- Pre-Approval**: 0 Draft, 0 Returned, 1 Submitted Last 90 days, + Create (highlighted with a red circle)
- Invoices**: 0 Draft, 0 Submitted Last 90 Days, + Create

The main content area displays the following information:




- Welcome to Chrome River, Regis University's new Expense, Pcard and Invoice Software**
- Financial Affairs is pleased to announce the phased rollout of our new software, Chrome River. The Chrome River rollout begins today with pcard expense reconciliation for pcard users.
- CONTACT**: For Expense reimbursement and Invoice assistance, please contact:
- PCard Support**: 303-439-4293, pcard@regis.edu
- US Bank 24 hour support-Credit Card Support**: 1-800-344-9696
- Accounts Payable Specialist**: 303-954-6133, ncrapr001@regis.edu
- NOTICE**: REMINDER: Mobile Device access. The Chrome River mobile app is available for download from the Apple App Store (iPhone / iPad) or Google Play (Android). In addition, you may also wish to download the CR Snap for iPhone or CR Snap for Android app, which provides quick and easy receipt capture and upload capability to your Chrome River eWallet.
- REMINDER: Emailing Receipts to Your Account**: Use the 'Snap and Send' feature to quickly load receipt images to your account. Simply take a photo of one or more receipts and

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

Split Equally

Clear Splits

| | | | | |
|---|---|---------|------|---|
| × | 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 | ◀ |
| | | 100.00% | 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.

chromeriver James Maniscalco Regis University

Pre-Approvals For James Maniscalco

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.

Cancel Save

Airfare

Estimated Amount 297.00 USD

Description Optional Roundtrip flight to Chicago

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).



Hotel

Allowable Total [Calculate](#)

Estimated Amount

Description
Optional

Hotel for 2 nights

Calculate Allowable Total ×

Start Date

End Date

Location

Rooms

| | |
|-------------------------|-------------------|
| 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
Optional

Rental car for 2 days

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

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' interface. On the left, a table titled 'Example Pre-Approval' lists expenses: Airfare (297.00 USD), Car Rental (95.00 USD), and Hotel (422.00 USD). The total estimated amount is 814.00 USD. On the right, there are buttons for adding pre-approval types: AIRFARE, CAR RENTAL, HOTEL, DONATIONS, SOFTWARE AS A SERVICE, COMPUTER EQUIPMENT, COMPUTER SOFTWARE, and GIFT CARDS.

| EXPENSE | ESTIMATED |
|------------|------------|
| Airfare | 297.00 USD |
| Car Rental | 95.00 USD |
| Hotel | 422.00 USD |

PA Report ID: 010000549715 | Total Estimated Amount: 814.00 USD | Submit

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' screen. It includes a confirmation message, a table of expenses, an account summary table, and a comments section. The account summary table is highlighted with a red box.

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

| | | | |
|------------|--------|------|--------|
| Airfare | 297.00 | 0.00 | 297.00 |
| Car Rental | 95.00 | 0.00 | 95.00 |
| Hotel | 422.00 | 0.00 | 422.00 |

| Account Summary | | AMOUNT (USD) |
|--------------------|---|---------------|
| 10-000-106160-0000 | 10 - General 106160 - RC UG Psychology / 0000 - General Activity | 271.34 |
| 10-000-100000-0000 | 10-General Operating Budget 100000-RC Dean / 0000-General Activity | 271.33 |
| PERSONAL | Non-Reimbursable Personal Expense | 271.33 |
| Total | | 814.00 |

Comments (0)

Add Comment Post

PA Report ID: 010000549715 | Total Estimated Amount: 814.00 USD | Submit

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 displays the Chrome River web application interface. At the top left, the Chrome River logo is visible. The user's name, James Maniscalco, and affiliation, Regis University, are shown at the top right. The main navigation area is divided into several sections:

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

At the bottom left, the last login information is displayed: "Last Login on 10/05/2021 at 8:02 PM".

On the right side, there is a "HELP" section with the following content:

- REMINDER: Mobile Device access**: The Chrome River mobile app is available for download from the [Apple App Store](#) (iPhone / iPad) or [Google Play](#) (Android). In addition, you may also wish to download the [CR Snap for iPhone](#) or [CR Snap for Android](#) app, which provides quick and easy receipt capture and upload capability to your Chrome River eWallet.
- REMINDER: Emailing Receipts to Your Account**: Use the 'Snap and Send' feature to quickly load receipt images to your account. Simply take a photo of one or more receipts and email them to receipt@ca1.chromeriver.com. The receipts will then be available within your Receipt Gallery. Be sure to send the email from an email account that is registered with Chrome River. Your company email address is already registered and you can easily add other addresses via the Preferences menu.

Below the reminders, there is a "HELP" section with the following text:

Please visit the [Chrome River Training Camp](#) to register for live webinar classes. Sessions include "Creating and Submitting Expense Reports", "Submitting and Approving Invoices" and "Approving Expense Reports". Other helpful information is also available on the training camp site.

Full Online HELP is also available throughout the application in the Chrome River Help Center.

At the bottom of the help section, there are several quick start guides:

- Getting Started (Help Guide)
- Creating a New Expense Report (Quick Start)
- Add Receipt Images (Quick Start)
- Approve Expenses (Quick Start)
- Create a Home Screen Shortcut (How To)
- Christopherson Travel** (Quick Start) - This option is circled in red in the image.

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 displays the Chrome River web application interface. On the left, a navigation menu includes sections for 'eWallet', 'Expenses', 'Pre-Approval', and 'Invoices'. The 'Expenses' section is highlighted and contains a '+ Create' button circled in red. The main content area on the right features the Regis University logo and a welcome message: 'Welcome to Chrome River, Regis University's new Expense, Pcard and Invoice Software'. Below this, there is a 'CONTACT' section with support information for PCard, US Bank, and Accounts Payable, and a 'NOTICE' section with reminders about mobile device access and receipt uploading.

Appendix C


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


 **Expenses For James Maniscalco**

Import from Pre-Approval IMPORT PRE-APPROVAL
Optional

Report Name

Pay Me In

Start Date 

End Date 

Business Purpose

Report Type

- ✓ -- Select --
- Athletic Recruiting
- Business Expense or Travel
- Non-Employee Expenses
- PCard Expense Reconciliation
- Student Expenses

Fiscal Year

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 ←

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

Fiscal Year: []

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

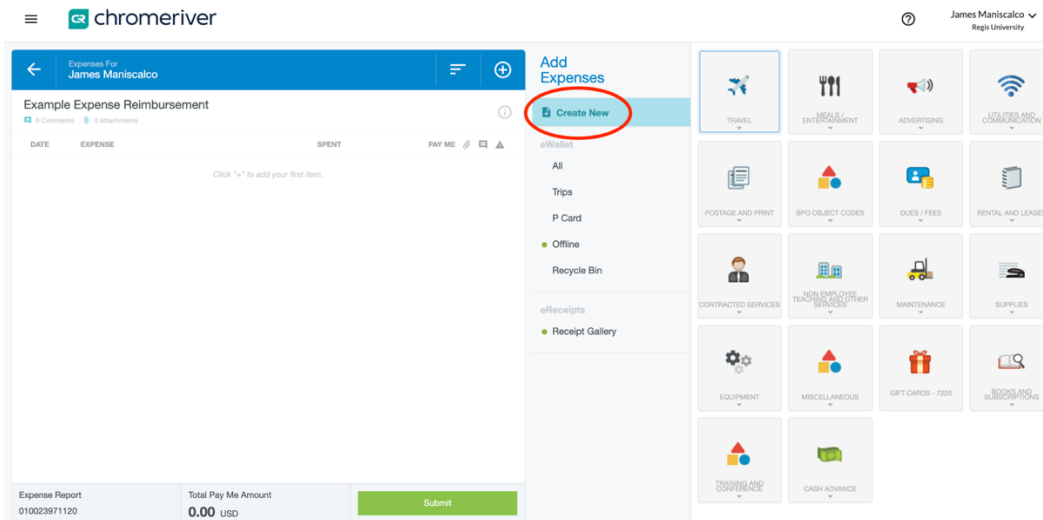
Import Pre-Approval

There are currently no valid pre-approvals available

Import

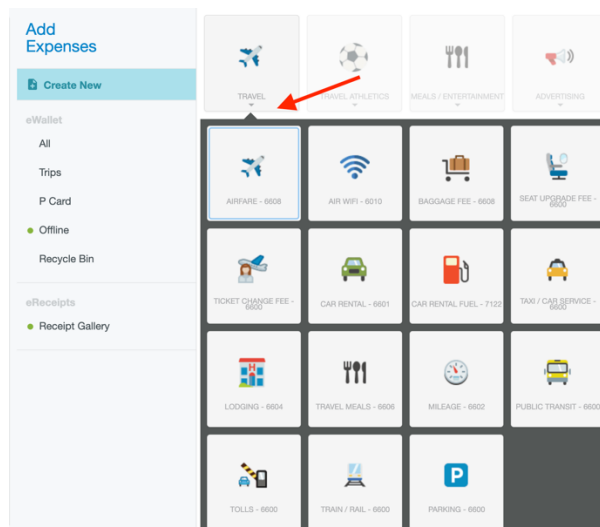
Appendix C

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).



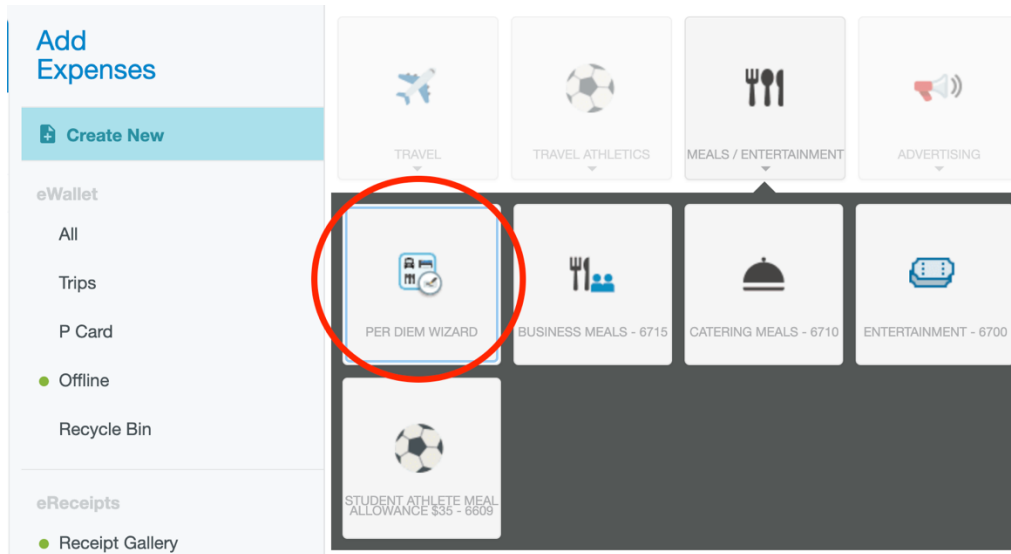
8. Add expenses – including all relevant pre-approved and not pre-approved items – to your reimbursement report. Note, the icons with a small downward facing arrow on the bottom of the box (e.g., travel) have a dropdown menu with additional options.

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

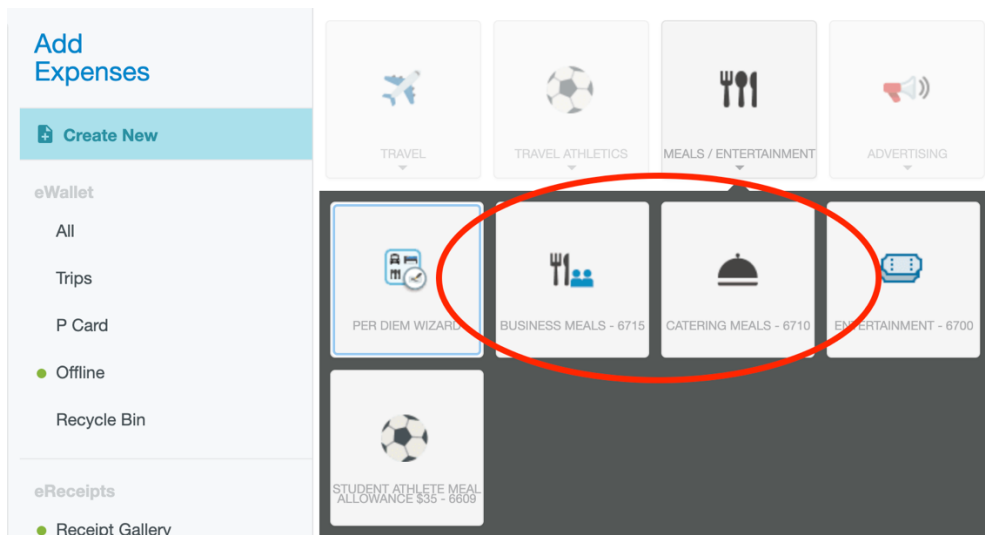


Appendix C

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

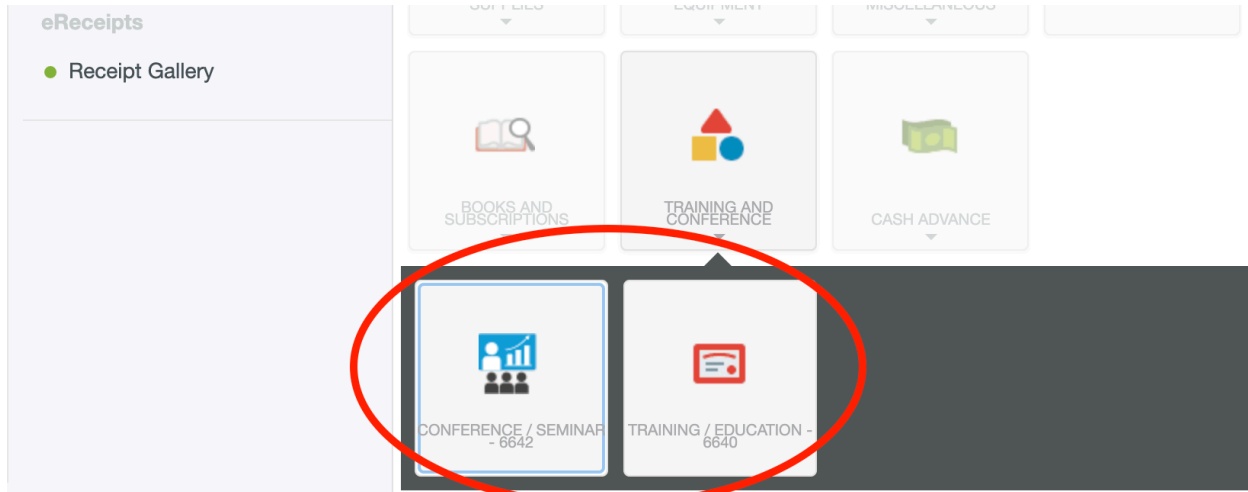


Note: **Business Meals** are for small groups (think: group dinner at a conference), and each individual in attendance will need to be listed (including name, affiliation, and title), including any non-Regis attendees. Conversely, **Catering** should be used for on-campus Regis events in which larger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

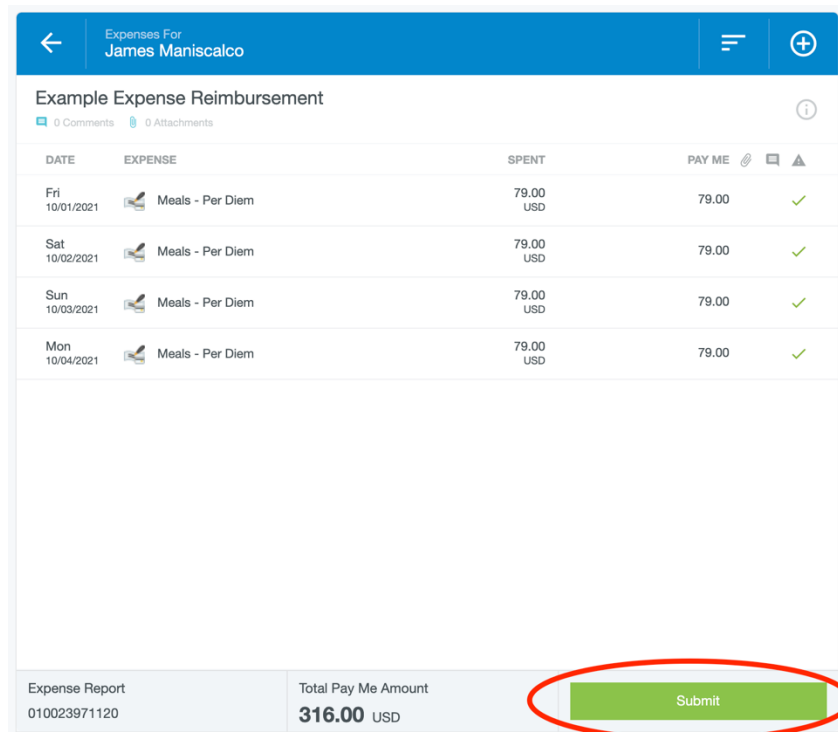


Appendix C

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

| | | |
|------------------|---------------|-------------|
| 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) 