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GLOSSARY

Advance- A requested amount of money given to a Traveler before an Official State Business trip to assist with estimated costs or actual expenses already incurred (airline flight).

Business Travel Account (BTA)- Instrument of the Transportation Request designed to assist employees who do not have a state travel card or personal credit card to pay for the major airline transportation costs. The airline ticket cost will be charged to the Texas Tech University Travel Services credit card, and the employee will not have to pay the airfare expense directly. The employee must claim the airfare expense and submit the airfare Receipt as documentation when submitting the Expense Report for the trip. The department will be charged for the cost of the ticket.

Cardholder- The holder of a Texas Tech-issued credit card, such as a Travel Card or Purchasing Card (Pcard).

Chrome River- Online expense management tool used by Texas Tech University System for Travel and Purchasing Card Expenses.

Chrome River Dashboard- The User's designated homepage within Chrome River, where all Expenses are uploaded for reconciliation.

Delegate- (formerly referred to as travel preparers) – Chrome River Users who can create Expense Reports for a Traveler and access the Traveler's settings menu, home screen, and Inquiry Reports. Delegates will receive copies of any email notifications regarding the rejection or adjustment of Expense Reports created for the Expense Owner(s); however, the Delegate will not be able to approve Travel Expenses routed to the Expense Owner. Expense Owners assign the Delegates. The TTU Travel Office will assign Department Card Delegates.

Designated Headquarters- The area within the boundaries of the city where a TTU/TTUS employee's place of employment is located. If an employee's place of employment is located within an unincorporated area, then the area within a five-mile radius of the place of employment is the employee's Designated Headquarters. If an incorporated municipality or an unincorporated area is surrounded by the incorporated municipality where an employee's place of employment is located, then the employee's Designated Headquarters includes the surrounding municipality or area.

Destination- The location or locations, other than the place of employment, to which a TTU/TTUS employee travels to conduct Official State Business.

Draft Reports- A report (both Pre-Approval and Expense Report) that has not been submitted. The User can still edit this report.

Expense Owner- The Traveler who incurred the Expense.

Expense Report- Submission in Chrome River used to request reimbursement for travel Expenses incurred during the discharge of Official State Business.

Expenses- a monetary amount spent while on official TTU/TTUS business travel that will be submitted for reimbursement.

Expired- Cancelling a Pre-Approval to release the encumbrance.

GLOSSARY

eWallet- a location in Chrome River where all credit card transactions and travel or expense Receipts are housed.

Final Reimbursement Amount- the Final Amount approved by the Travel Office.

Flight Credits- A credit from either a canceled flight or a downgrade in fare that can be used to buy a future flight.

GSA Per Diem- The General Services Administration (“GSA”) establishes the maximum Continental United States per diem rates for Travelers reimbursed with federal funds. Per Diem is a set allowance for lodging, meals, and incidental costs incurred while on official government travel.

Inquiry Reports- Allows Users to perform quick inquiries on all activities by category.

Meals and Incidentals (“M&IE”)- The full daily amount received for a single calendar day of travel when that day is neither the first nor last day of travel.

Official State Business- TTU-related business travel that is for the benefit of the institution and consistent with the University’s legal authority.

Origination- The location to which a state employee’s trip begins. The Origination may not be the Designated Headquarters.

Pre-Approval- Submission in Chrome River used to document a request for travel and encumber Expenses.

Receipt- A written or printed statement acknowledging that something has been paid for or that goods or services have been received.

Receipt Gallery- Contains all the Receipt images uploaded directly to the gallery via the Chrome River app and via [Chrome River SNAP](#).

SNAP (Chrome River SNAP)- Enables Travelers to quickly and easily capture and upload Receipt images when the Expense occurs. The Traveler can Snap a photo of the Receipt using the SNAP app on the Traveler’s mobile device, and it will upload directly to the Chrome River Receipt Gallery and the offline tab of the eWallet for reconciliation in Chrome River. SNAP may also be used to upload images taken with another app on the Traveler’s mobile device (ex., Marriott hotels).

Total Requested Reimbursement- The amount that will be submitted to the Travel Office for reimbursement. This does not always reflect the Final Reimbursement Amount.

Travel Manual- The written policies and procedures pertaining to official travel taken by TTU/TTUS employees, students, prospective employees, and guests.

Traveler – any TTU and TTU System faculty, staff, or student traveling on TTU-related business. Travelers also include TTU System Board of Regents members.

User- the Traveler or Delegate operating within the Chrome River System.

CHROME RIVER GENERAL TRAVEL OVERVIEW

Travel Reconciliations will be processed in Chrome River beginning July 1, 2023. Chrome River will replace the current Travel 2.0 system for all Texas Tech University (“TTU”) and Texas Tech University System (“TTUS”) faculty, staff, prospective faculty or staff, or students traveling on TTU/TTUS-related business. For specific information on travel guidelines or policies, refer to the updated Travel Manual. Travel 2.0 system shall not be used for Pre-Approvals or Travel Reconciliations for travel occurring after September 1, 2023.

CHROME RIVER LOGIN (eRaider authenticated)

This login may also be used from most mobile devices:

<https://app.ca1.chromeriver.com/login/sso/saml?CompanyID=ttu.edu>

Users may also access the link through Raiderlink under the A&F Work Tools Tab >> Procurement Services >> Chrome River or from the Employee Tab >> Important Texas Tech Links >> Chrome River.

SYSTEM REQUIREMENTS

While other web browsers may also operate the Chrome River application successfully, supported browsers are those on which we have tested and fixed any bugs. Chrome River certifies the latest version of the following browsers:

Supported Desktop Browsers

- **Google Chrome**
- **Microsoft Edge**
- **Mozilla Firefox**
- **Apple Safari:** **NOTE** that we do not currently support Safari in “Private” mode. Users must turn off Private mode before logging in to Chrome River.

Recommended Mobile Browsers

- **Google Chrome**
- **Apple Safari**

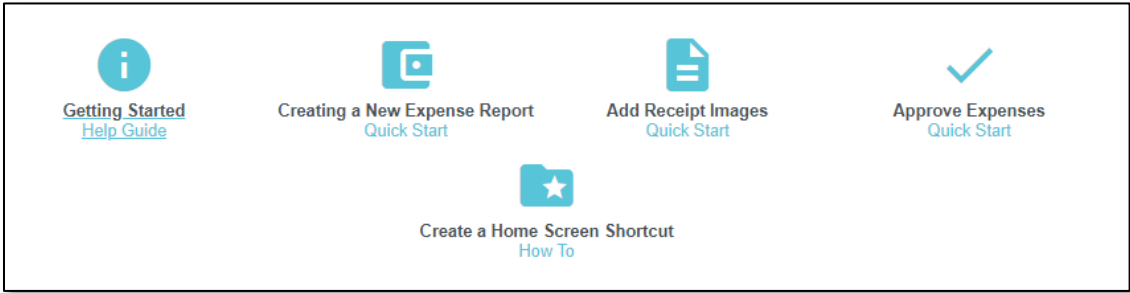
Recommended Mobile Devices

- **iPhone:** Current and previous generation.
- **iPad:** Current and previous generation.
- **Android:** Chrome River is committed to providing support for mainstream Android devices but recognizes that Android hardware is so diverse that adequate testing for all devices cannot be guaranteed

Additional information can be found in Chrome River Help ([here](#)).

NAVIGATION

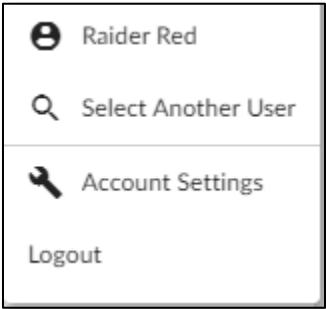
The Chrome River Dashboard (the “Dashboard”) has messages and contact information on the right-hand side of the screen, and Users may view help options at the bottom of the page.



The Chrome River icon will always allow the User to return to the Dashboard.



The right side of the Dashboard shows the Expense Owner’s name. All TTU/TTUS employees have access to Chrome River. Users can click on the name from a drop-down menu to access the User’s Profile, Select Another User, Settings, and Logout.

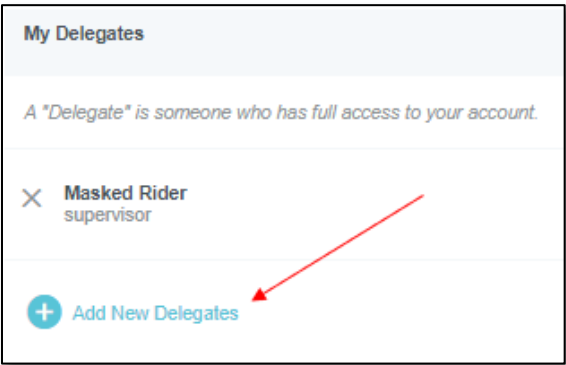


View Profile: shows the User’s or Cardholder’s name, title, R Number (TTU/TTUS identification number), and email address.

Select Another User: a list of Users that the Delegate has been granted permission to access will be visible here.

Account Settings:

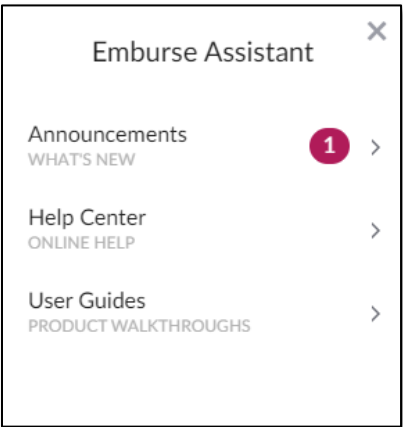
- **Personal Settings:** allows the User to add additional email addresses the User may utilize for uploading Receipts. The User's ttu.edu email address is already populated as the primary email.
- **Delegate Settings:** allows the User to add Delegates to have full access to the User's Dashboard, create Expense Reports on the User's behalf, and run Inquiry Reports. **Approval Delegate is designed to add an Approver for a specified time; however, it is not operational currently.**



- To Add a Delegate, click on Add New Delegates. Begin entering the User's name, R Number, or email address the search results will narrow. Choose the appropriate Delegate.
- To Remove a Delegate, select the X next to the User's name.

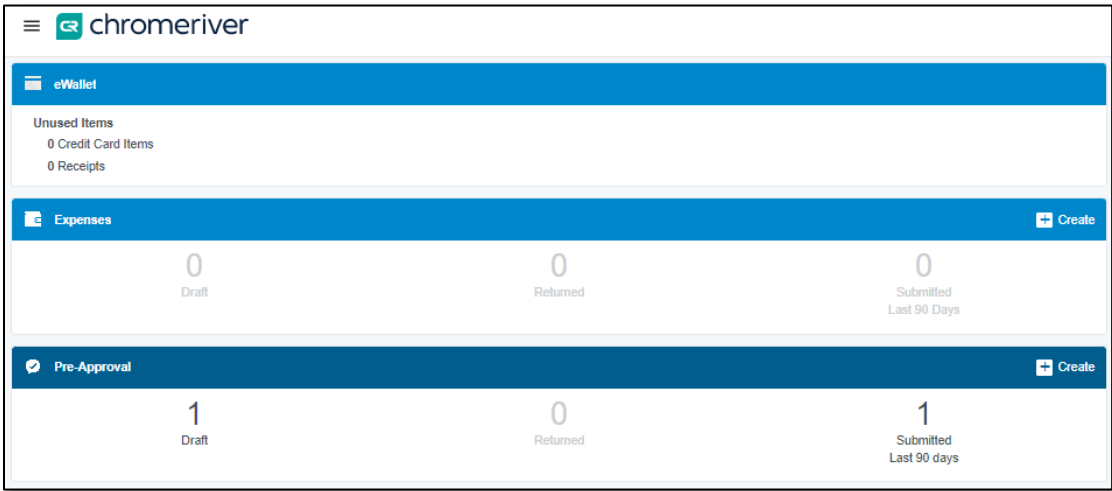
Logout: Will log the User out of the Chrome River system.

The ? Logo next to the settings button provides additional assistance. A pink circle will be shown if there is new information.

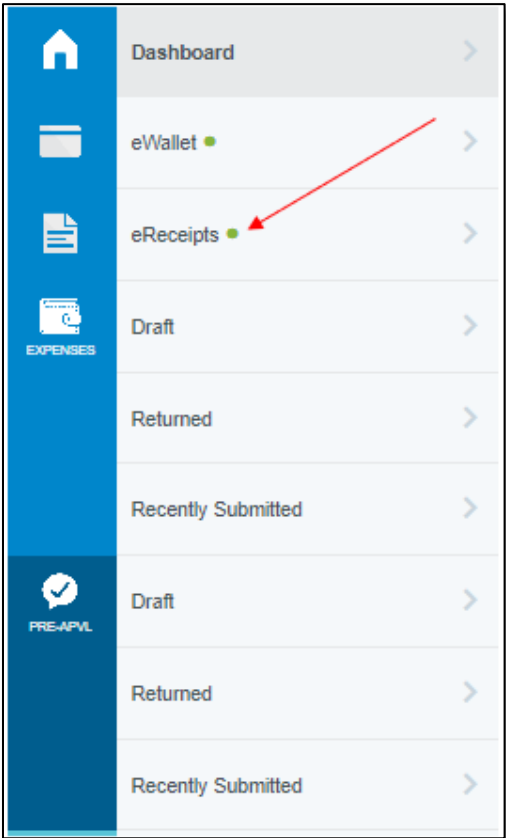


NAVIGATION – Dashboard

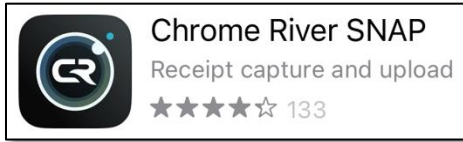
The Dashboard's left side shows Pending Approvals, Expense/Pre-Approval Drafts, Returned Pre-Approvals, Expense Reports, Submitted Pre-Approval/Expense Reports, and the eWallet.



The Menu Bar ≡ in the upper left-hand corner of the Dashboard will also allow the User to access Approvals, eWallet, eReceipts, Dratts, Returned, Recently Submitted, and Inquiry. The green dot next to the item indicates that there are items to view.



RECEIPTS



Chrome River SNAP App (“SNAP”) – Mobile Device access:

SNAP enables Users to quickly and easily capture and upload Receipt images when the expense occurs. The User can take a photo of the Receipt using the SNAP app in the User’s mobile device, and it will upload directly to the Chrome River Receipt Gallery, and the offline tab of the eWallet for reconciliation in Chrome River. SNAP may also be used to upload images taken with another app on the User’s mobile device.

Download the free SNAP app from the App Store (iOS) or Google Play Store (Android).

Emailing Receipts: Use the Snap and Send feature to load Receipt images to the User’s eWallet quickly. The User can take a photo of one or more Receipts and email it to receipt@ca1.chromeriver.com. The Receipts will then be available within the User’s Receipt Gallery. Use the ttu.edu email account that is registered with Chrome River or add additional email addresses via the Preferences menu. ([Navigation](#))


Emailing Receipts to Another User’s eWallet: enter the Cardholder’s ttu.edu email address in the email’s subject line and mail to receipt@ca1.chromeriver.com. The sender must be a TTU/TTUS employee and have the email address sent from stored in Chrome River.

Attach Directly to Line Item: PDF Receipts may be dragged and dropped onto a line-item Expense from the Receipt Gallery, Desktop, or uploaded with the Add Attachments option on the line item.

Additional Receipt information: Attach images to an expense while creating it or after it has been created. Images may be uploaded directly through the application, emailed, or added via [Chrome River SNAP](#).

- Only JPG, PDF, PNG, OFD, and TIFF files can be accepted when an image is attached via the Chrome River app.
- Only JPG, PNG, and HEIC/HEIF files can be accepted via Chrome River SNAP.
- No file may be greater than 10 MB, and there is a limit of 499 images per Expense Report.

SUBMITTING PRE-APPROVALS

From the Chrome River Dashboard, click on  to create a new Pre-Approval.

NOTE: Pre-Approvals are required to be submitted when traveling internationally and must be submitted at least thirty (30) days prior to the departure date.

If the cost of the trip is at no cost to TTU, the User will need to enter a Pre- Approval for one dollar (\$1.00) to allow for routing to the Office of International Affairs. Once the trip has concluded, the Pre-Approval can be Expired, and the encumbrance will be released.



Pre-Approval Header:

- **Report Name:** Trip Date, Destination → (Example: 1/2/23 to 1/4/23 El Paso, TX)
- **Start Date:** The beginning of the trip.
- **End Date:** The date of return to the Designated Headquarters.
- **Business Purpose:** Enter a detailed statement on the business purpose (how this trip benefited TTU/TTUS and the sponsored project (grant)).
- **Chart:** This will be hardcoded based on the User's HR feed.
- **Traveler Type:** Select the correct Traveler type from the list. Non-Employee speakers/participants/contractors will need to be processed in TechBuy. Coming soon to Chrome River*
- **Trip Purpose:** Select the purpose for the trip.
NOTE: The trip purpose varies depending on the chart selected. Be sure the correct chart is chosen for the appropriate list.
- **Approver:** Manually select the approver. Search by typing in the Approver's name or R Number.
 - Select the organization's financial manager, approver, or supervisor.
 - A Traveler is unable to approve the Pre-Approval. The supervisor of the Traveler must be selected for approval.
- **Origination:** Trip origin location
- **Destination:** The official business trip location (city and state)
- **Trip Type:** This will automatically change based on the Destination location. If the trip type is incorrect, verify the Destination to make sure the correct location was chosen.
- **BTA will be used:** Will a Business Travel Account (BTA)? Yes, or no?
- **BTA-** If yes is chosen above, choose the correct BTA that was used. (SWABIZ, National Travel System ("NTS") or Bell Travel)
- **Vacation taken on this trip checkbox:** select if taking vacation time before, during, or after the official business travel.
- **Vacation details:** If the box is selected above, include the vacation/ personal time dates and locations.
- **Fiscal Year:** Current Fiscal Year will auto-populate. (Utilize the drop box for available Fiscal Year options).

SUBMITTING PRE-APPROVALS

- **Allocation:** Click the Allocation box to search by entering FOP or a portion of FOP.
 - Splitting FOPs- Click Add Allocation to split by percentage or dollar amount.
 - Presets- Create Preset allows the User to use the FOP selected on future line items or Expense Reports. Enter the FOP in the Allocation section and click on Create Preset. Name the Preset and click Create.

Allocation

Split Equally

Clear Splits

<div>×</div> <div>T-18C000-C13000-600 FUND: Administration Overhead (LOCAL) ORGN: Procurement Services / PROG: ...</div>	50 %	78.00	⌵
<div>×</div> <div>T-18C000-C13000-400 FUND: Administration Overhead (LOCAL) ORGN: Procurement Services / PROG: ...</div>	50 %	78.00	⌵
	100 %	156.00	

+

Add Allocation

≡







Presets

CREATE PRESET

- Click on Presets to use the established preset allocation on future reconciliations.
- Click Save.

ADD ESTIMATED EXPENSES/ PRE-APPROVAL (PA) BEFORE TRIP


Add Pre-Approval Types

 AIRFARE	 GROUND TRANSPORTATION	 LODGING	 MEALS	 DUES / FEES	 MISCELLANEOUS / OTHER
--	--	--	--	--	--

- Select the appropriate Expense Type under the main category you wish to encumber for.
- After the Expense Type is selected, the form for the Expense opens for completion. Some forms may require additional information based on the tile chosen.

AIRFARE

- **Airfare** - Include the estimated amount of the airfare. If a BTA is used, the BTA checkbox will be greyed out. You will need to attach a screenshot from the travel agency/booking tool to the header page.

 **Airfare**

Vouchers issued by airline at no expense and Early Bird Check-in are not reimbursable


Estimated Amount

Description Optional

BTA ☐

- **Personal Plane Mileage** - Include the estimated amount for the personal plane mileage. Use the dropdown menu to indicate the type of plane that will be used.

NOTE: The TTU President or TTU Chancellor’s approval must be obtained and attached to the header page.

 **Personal Plane Mileage**

Evidence of Presidential approval must be obtained and attached to report.







Estimated Amount

Personal Plane

Description Optional

ADD ESTIMATED EXPENSES/ PRE-APPROVAL (PA) BEFORE TRIP

Add Pre-Approval Types

 AIRFARE	 GROUND TRANSPORTATION	 LODGING	 MEALS	 DUES / FEES	 MISCELLANEOUS / OTHER
--	--	--	--	--	--

- Select the appropriate Expense Type under the main category you wish to encumber for.
- After the Expense Type is selected, the form for the Expense opens for completion. Some forms may require additional information based on the tile chosen.

GROUND TRANSPORTATION

Mileage

- **Date**- enter the date the PA is being submitted.
- **Estimated amount**- this will automatically calculate based on what is entered in the Miles Category.
- **Description**- this will auto-fill with your Origination and Destination location based on what is entered in the Miles Category.
- **Mileage Type** – you will choose from the drop down for either an individual trip or monthly mileage. You would choose an individual trip if this was for a trip while on travel status. The monthly mileage is used for employees whose job responsibilities require travel within their designated headquarters.
- **Rate**- Automatically entered based on the current rate.
- **Miles**- Click “Calculate Mileage” and enter the Origination and Destination. The User can add multiple Destinations. Select Save Trip. **NOTE**: The mileage calculator ([here](#)) will be required for trips over 100+ miles.
- **Deduction**- This category is for the Travel Office to make any necessary changes. This will be used on the Expense Report rather than the PA.

Mileage / Google Map

Date: 04/18/2023

Spent: 84.19 USD

Mileage calculator is required for trips of 100+ miles. Reimbursement is the lesser cost of rental car vs. mileage.

Description: From:: Texas Tech University, Broadway, Lubbock, TX, USA
To:: Texas Tech University School of Veterinary Medicine, Evans Drive, Amarillo, TX, USA

Mileage Type: -- Select --


Rate: -- Select --


Miles: 128.53 Calculate Mileage


Deduction: None


ADD ESTIMATED EXPENSES/ PRE-APPROVAL (PA) BEFORE TRIP


Add Pre-Approval Types



AIRFARE


GROUND TRANSPORTATION


LODGING


MEALS


DUES / FEES


MISCELLANEOUS / OTHER

- Select the appropriate Expense Type under the main category you wish to encumber for.
- After the Expense Type is selected, the form for the Expense opens for completion. Some forms may require additional information based on the tile chosen.

LODGING

- **Allowable Total** - To calculate the allowable total, click [Calculate](#). Enter the requested information and select Save. This will show the selected location's allowed General Services Administration (“GSA”) Per Diem rate.
 - Estimated Amount- Enter the total estimated amount for the lodging.
 - Description (optional)

Calculate Allowable Total

Start Date

01/23/2023

End Date

01/24/2023

Location

El Paso-El Paso County, Texas (TX), United States

Rooms

1

Nights

1

Average Daily Room Rate

98.00 USD

Base Total

98.00 USD

Allowable Total


98.00 USD


Cancel


Save


ADD ESTIMATED EXPENSES/ PRE-APPROVAL (PA) BEFORE TRIP


Add Pre-Approval Types



AIRFARE


GROUND TRANSPORTATION


LODGING


MEALS


DUES / FEES



MISCELLANEOUS / OTHER

MEALS

- **Meals- Per Diem:** This tile is used to claim Per Diem meals for the trip. (Receipts are not required)
 - **Number of Days-** This is the total number of days the Traveler will be traveling on behalf of TTU/TTUS (do not include any additional personal vacation days).
 - **Average Daily Amount-** This is the Meals and Incidentals (“M&IE”) total found on the GSA website. (<https://www.gsa.gov/travel/plan-book/per-diem-rates>)

Primary Destination ⓘ	County ⓘ	M&IE Total	Continental Breakfast/Breakfast	Lunch	Dinner	Incidental Expenses	First & Last Day of Travel ⓘ
-----------------------	----------	------------	---------------------------------	-------	--------	---------------------	------------------------------

- **Estimated Amount-** This will automatically calculate based on the information entered in the previous two categories.



Meals - Per Diem

Use this site to determine the per diem allowance for your location: <https://www.gsa.gov/travel/plan-book/per-diem-rates>

Number of Days

2

Average Daily Amount

59

Estimated Amount


118.00

USD

Description

Optional

- **Meals- Itemized:** This tile will be used when to claim actual meal Expenses for the trip. (Receipts required)
 - Number of Days- This is the total number of days the Traveler will be traveling on behalf of TTU/TTUS (do not include any additional personal vacation days).
 - Average Daily Amount- This is the M&IE total found on the GSA website. (<https://www.gsa.gov/travel/plan-book/per-diem-rates>)



Meals - Itemized

Use this site to determine the per diem allowance for your location: <https://www.gsa.gov/travel/plan-book/per-diem-rates>

Number of Days

2

Average Daily Amount

59

Estimated Amount

118.00







USD

Description

Optional

ADD ESTIMATED EXPENSES/ PRE-APPROVAL (PA) BEFORE TRIP


Add Pre-Approval Types

 AIRFARE	 GROUND TRANSPORTATION	 LODGING	 MEALS	 DUES / FEES	 MISCELLANEOUS / OTHER
--	--	--	--	--	--


- Select the appropriate Expense Type under the main category you wish to encumber for.
- After the Expense Type is selected, the form for the Expense opens for completion. Some forms may require additional information based on the tile chosen.

DUES/FEES

- **Registration Fees** –
 - **Estimated Amount:** Include the estimated amount of the registration fee.
 - **Registration Fee Type:** Use the Dropdown to indicate the type of registration that will be purchased. This is important, as there are different account codes for each type of registration fee.

 **Registration Fees**

PCard is the preferred method of payment for Registration Fees.

Estimated Amount 


Registration Fee Type


Description Optional


NOTE - The preferred payment method for registration fees is the Pcard.


ADD ESTIMATED EXPENSES/ PRE-APPROVAL (PA) BEFORE TRIP


Add Pre-Approval Types



AIRFARE


GROUND TRANSPORTATION


LODGING


MEALS


DUES / FEES


MISCELLANEOUS / OTHER

- Select the appropriate Expense Type under the main category you wish to encumber for.
- After the Expense Type is selected, the form for the Expense opens for completion. Some forms may require additional information based on the tile chosen.

MISCELLANEOUS/OTHER

- **Miscellaneous/ Other:** Include a detailed description of the expense and the business justification.

 Miscellaneous / Other

Description of expense and business justification required.

Estimated Amount

0.00

USD

Description

[Back to Top](#)

FINALIZING PRE-APPROVALS

Attach any required documentation to the front Header Page

Attachments (0)

Drag image here to upload

Upload Attachments

Click on Submit when the Pre-Approval is completed.

Submit Preapproval

By submitting this report, I hereby certify that all expenses listed are true, correct, and related to official State business. I approve all corrections made to this report by my Institution due to errors or changes necessary to comply with State of Texas laws and rules, as well as Texas Tech policies and procedures.

Cancel

Submit

The submitted Pre-Approval will show in the User’s Submitted menu on the Dashboard.

Submitted

Testing PA

01/23/2023

80.81 USD

PENDING

- Click on the Pre-Approval Report to Open, View in PDF, View Tracking Status, or Recall.
- Pending Status – waiting for approval(s) or budget check.
- Approved Status- The Pre-Approval has been approved. The User can now submit an Expense Report- Advance, or once the trip is concluded, the User can submit the Final Expense Report.

Draft Reports:

Access Draft Reports from the Chrome River Dashboard. Click on the Pre-Approval and Open it to continue processing, Delete, or Submit the Report

Open

Delete

PDF

Submit

Tracking:

Open

PDF

Tracking

Recall

- From the submitted Pre-Approval Report Grid, click on the PA to preview it.
- The User may then click on tracking to see the Routing Steps. Click on each step to view details.

Routing Steps

✓

✓

✓

✓

5

6

7

8

Step Number

1

SUBMITTING EXPENSE REPORTS – ADVANCE REQUEST

From the Chrome River Dashboard, click on  to create a new Expense Report.

Expense Report (“ER”) Header- Advance Request:

- **Report Name:** Trip Date, Destination- Advance → (Example: 1/2/23 to 1/4/23, El Paso)
- **Chart:** This will be hardcoded based on the User’s HR feed.
- **Start Date:** The date the official business begins.
- **End Date:** The date of return to the Designated Headquarters.
- **Vacation taken** on this trip checkbox: select this if taking vacation before, during, or after the official business travel.
- **Vacation details:** If the box is selected above, include the dates and location of the vacation or personal time.
- **Business Purpose:** Enter a detailed statement on the business purpose (how this trip benefited TTU/TTUS and the sponsored project (grant)).
- **Type:** Select Advance.
- **Traveler Type:** Select the correct Traveler type from the list. Travel Advances are prohibited for Prospective, Non-Employees, and Athletic Participants.
- **Trip Purpose:** Select the purpose for the trip.
 - **NOTE:** The trip purpose varies depending on the chart selected. Be sure the correct chart is chosen for the appropriate list.
- **Approver:** Manually select the Approver. Search by typing in the Approver’s name or R Number.
 - Select the organization code’s financial manager, approver, or Traveler’s supervisor.
 - A Traveler is unable to approve the Pre-Approval. The Supervisor of the Traveler must approve the transaction.
- **Origination:** Where the trip originates.
- **Destination:** Where the Official State Business trip is located.
- **Trip Type:** This will automatically change based on the Destination location. If the Trip Type is incorrect, check the Destination to ensure the correct location was chosen.
- **PA Report ID:** Submit the report ID number of the Pre-Approval that corresponds to this trip.
- **Fiscal Year:** Current Fiscal Year will auto-populate.
 - Utilize the drop box for available Fiscal Year options.
- **Attachments:** Please do not upload the individual Receipts here. Receipts must be uploaded under the expense type.
- **Import Travel Pre-Approval Box:** **DO NOT SELECT THIS FOR ADVANCE REQUESTS**
- Click **Save**.

ADD ADVANCED REQUEST EXPENSES

Select the Expense Type under the Main Category

Add Expenses

Create New

eWallet

PREPAID EXPENSE ADVANCE

CASH ADVANCE REQUEST

ITEMIZATION

Prepaid Expense Advance:

- **Fund:** Type in the fund that the Advance will be expensed against. Enter the chart fund values. Chrome River takes a moment for the list to catch up.
- **Date:** Enter the departure date of the trip. If the incorrect date is entered, the User may not be able to continue based on the departure date.
 - Reminder: Advance requests must be submitted at least five (5) working days before the trip Departure for domestic trips and at least thirty (30) working days before the trip Departure for international trips.
- **Spent:** Enter the amount of the prepaid expense.
- **Type of Expense Paid Before Trip:** Enter the expense type the User is requesting an Advance on. If “other” is chosen, the User must provide additional information in the trip description.
- **Description:** Enter any additional information the Travel Office may need to approve the request.
- **Allocation:** This is automatically entered based on the chart chosen on the header page.

Attach itemized Receipts detailing the Final payment for the expense(s). A redacted credit card statement may be required if the itemized Receipt does not include the payment method.

Prepaid Expense Advance

Fund

-- Select --

Please refer to your institution's Operating Policies for additional information.

Date

Spent

0.00

USD

Type of Expense Paid Before Trip

-- Select --

Proof of payment is required. Please attach an itemized receipt or redacted credit card statement.

Description

Optional

Allocation

T-Advance - Chart T - Advance

ADD ADVANCED REQUEST EXPENSES


Select the Expense Type under the Main Category


Add Expenses


Create New

eWallet

All



PREPAID EXPENSE ADVANCE


CASH ADVANCE REQUEST


ITEMIZATION

Cash Advanced Request:

- **Fund:** Enter the Fund that the Advance will process against. The User will need to type the chart-fund value. The system takes a moment for the list to catch up.
- **Date:** Enter the departure date of the trip. If the User enters the incorrect date; the User may not be able to continue based on the Departure date.
 - Reminder: Advance requests must be submitted at least five (5) working days before the trip Departure for domestic trips and at least thirty (30) working days before the trip Departure for international trips.
- **Spent:** Enter the amount needed for the Advance. The rules set forth in the Travel Manual and Travel OP [79 Travel](#) still apply to all transactions. In addition, any sponsored project requirements must be managed by the department. Travel Services does not have knowledge about the requirements of each sponsored project.
- **Description:** Provide a breakdown of the requested cash Advance and any information the Travel Office may need to approve the request.
- **Allocation:** This is automatically entered based on the chart chosen on the header page.
- **Attachments:** Attach a copy of the Pre-Approval PDF Form for review.

Cash Advance Request

Cash advances will be paid 5 working days prior to departure. Please refer to your institution's Operating Policies for additional information.

Fund

T-18C000-Administration Overhead

Date

02/11/2023

Spent

200.00

USD

Please provide a breakdown of the requested cash advance expenses.

Description

Advance will help with Meal Per Diems, and Taxi Charges.

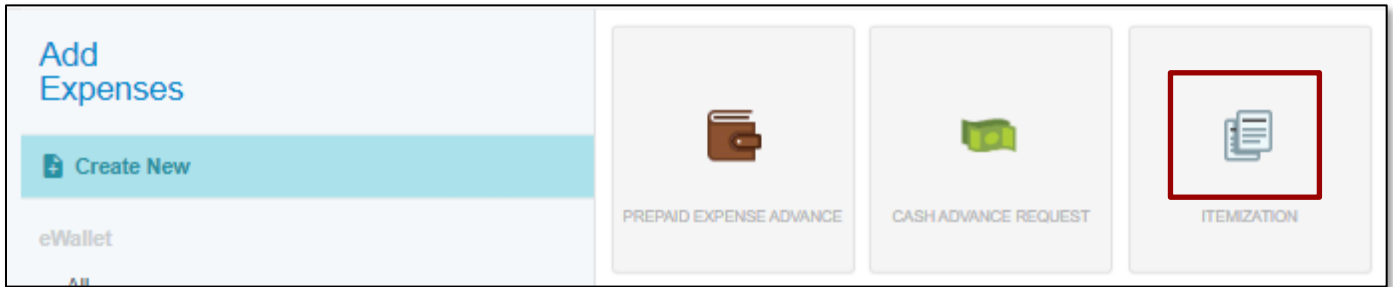
Attach full Pre-Approval PDF report to Cash Advance request. Request cannot exceed 90% of the traveler's estimated, encumbered expenses.

Allocation

T-Advance - Chart T - Advance

ADD ADVANCED REQUEST EXPENSES

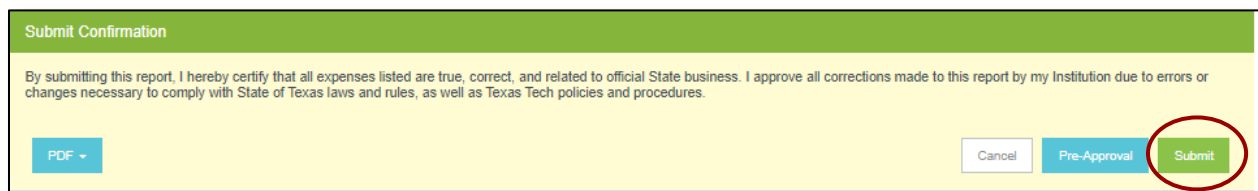
Select the Expense Type under the Main Category



Itemization: This tile does not apply to Advance requests. Do not use this tile.

FINALIZING THE EXPENSE REPORT – ADVANCE REQUEST

- Verify all necessary documentation is attached.
- Click Submit when the Expense Report- Advance Request is complete.



- The submitted Pre-Approval will show in the User's Submitted menu on the Dashboard.
- Click on the Expense Report to Open, View in PDF, View Tracking Status, or Recall.
- **Pending status** – waiting for approval(s) or budget check.
- **Approved Status** - The Pre-Approval has been approved. The User can now submit an Expense Report- Advance, or once the trip is over, the User can submit the Final Expense Report.


[Back to Top](#)

SUBMITTING EXPENSE REPORTS – EXPENSE REPORT (FINAL)

From the Chrome River Dashboard, click on  to create a new Expense Report.



Expense Report (ER) Header- Final:

- Importing the Pre-Approval
 - Import Travel Pre-Approval: click the box, to copy all the travel details from the Pre-Approval. This is optional, but it will import all Expenses encumbered and make submitting the trip information easier. If the User did not submit a Pre-Approval prior to the trip, the function cannot be utilized.
- A screenshot of a button labeled 'Import Travel Pre-Approval' with the word 'Optional' below it. To the right of the button is a smaller button labeled 'IMPORT PRE-APPROVAL'.
- Choose the Pre-Approval that matches the Expense Report (ER) and select Import.
 - Verify all the imported details on the header page, and make sure changes are not needed. If changes are needed, enter at this point. If all details are correct, the User can skip to the end and save the Header page.
 - If the Pre-Approval was not imported, move to the next bullet point.
- **Report Name:** Trip Date, Destination- Advance → (Example: 1/2/23 to 1/4/23, El Paso)
- **Chart:** This will be hard coded based on the User's HR feed.
- **Start Date:** The date the official Business Travel begins.
- **End Date:** The date the Traveler returns to the Designated Headquarters.
- **Vacation Taken** on this Trip checkbox: select this if the Traveler is taking vacation time before, during, or after the official Business Travel.
- **Vacation Details:** If the box is selected above, include the vacation/personal time dates and locations.
- **Business Purpose:** Enter a detailed statement on the business purpose (how this trip benefited TTU/TTUS and the sponsored project (grant)).
- **Type:** Choose Expense Report (After Trip)
- **Did the Traveler receive an Advance for this trip?** Choose Yes or No.
 - **NOTE:** If the submission is a supplemental request, and the Advance has already been reconciled with the original submission, choose No.
 - This dropdown will only show when Expense Report (After Trip) is chosen.
- **Traveler Type:** Select the correct Traveler type from the list based on the Traveler's Dashboard.
 - **NOTE:** Non-Employee (Speaker/Participant/Contractor) Travel must be submitted in Techbuy. All other Traveler types must be submitted in Chrome River.
- **Trip Purpose:** Select the purpose for the trip.
 - **NOTE:** The trip's purpose varies depending on the chart selected. Be sure the correct chart is chosen for the appropriate list.



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SUBMITTING EXPENSE REPORTS – EXPENSE REPORT (FINAL)

- **Approver:** Manually select the Approver. Search by typing in the Approver’s name or R Number.
 - Select the organization code’s financial manager, approver, or Traveler’s supervisor.
 - A Traveler is unable to approve the Pre-Approval. The Supervisor of the Traveler must approve the transaction.
- **Origination:** Where the trip originates.
- **Destination:** Where the official business trip is located
- **Trip Type:** This will automatically change based on the Destination location. If the Trip Type is incorrect, verify the Destination to ensure the correct location was chosen.
- **Fiscal Year:** Current Fiscal Year will auto-populate.
 - Utilize the drop box for available Fiscal Year options.
- Click **Save**.

Expense Report (ER) Header- Final:

Add Expenses

Create New

eWallet

All

Trips

Offline

Credit Card

Travel Advances

AIR TRAVEL

GROUND TRANSPORTATION

LODGING

MEALS

DUES / FEES

MISCELLANEOUS

FOOD AND ENTERTAINMENT

ITEMIZATION

If a Pre-Approval was imported, all Expenses will be brought in on the left side of the Expense Report and will have a Red Compliance Error. The User will need to go into each imported tile and provide additional information for the Compliance Error to be removed.

Testing CR

0 Comments0 Attachments

DATE	EXPENSE	SPENT	REQUESTED	REIMBURSEM...	
Sun 03/26/2023	Meals - Per Diem	118.00 USD	118.00		▲
Sun 03/26/2023	Lodging	154.00 USD	0.00		▲
Sun 03/26/2023	Car Rental Fuel	75.00 USD	75.00		▲
Sun 03/26/2023	Airfare	124.38 USD	124.38		▲

Create New

eWallet

All

Trips

Offline

Credit Card

Travel Advances

Recycle Bin

eReceipts

All Items

SortGroup by: None

Chart S/T - PCard
Registration Fees
06/30/2020
▶ TRAINHR

Chart S/T - PCard
Other
10/12/2020
▶ CVS/PHARMACY #10521

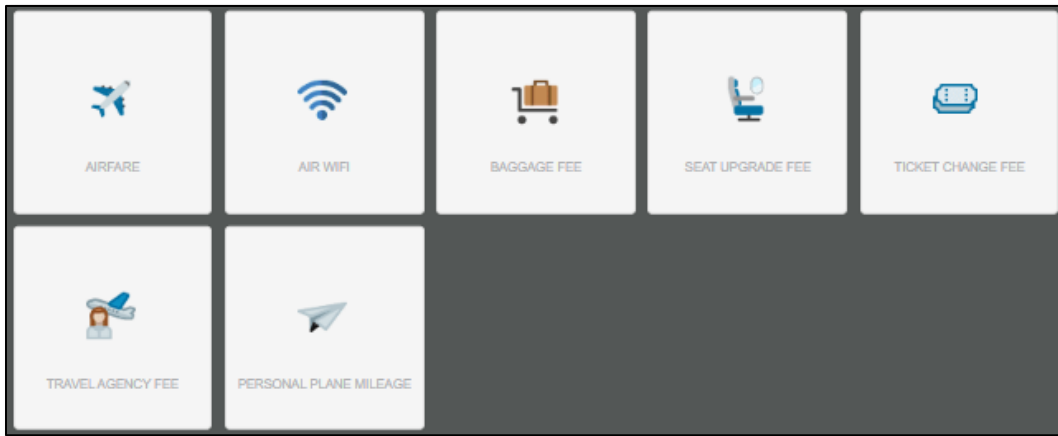
Travel Advance
Business Meeting
01/31/2021
▶ PrePaid Airfare

NOTE: If meals were imported, the User will need to click on the line item and delete this entry. Meals will need to be entered separately.

NOTE: If traveling internationally, the Pre-Approval is required to be imported to the Final Expense Report. If the User neglected to submit a Pre-Approval prior to the trip, an after-the-fact Pre-Approval will be required for the Office of International Affairs (OIA) to approve. The expenses will not be reimbursed if OIA does not approve the after-the-fact Pre-Approval.

ADD FINAL EXPENSE REPORT EXPENSES: AIRFARE

Airfare: Choose the tile that best matches the reimbursement expense.



➤ Airfare

- **Date:** Enter the date the expense was paid
- **Spent:** Enter the amount that reimbursement is being requested
- **Description (Optional):** Enter any information the Travel Office may need regarding the expense.
- **Airline:** Choose the airline. If “Other” is selected, enter in the name of the airline.
- **Class:** choose the class of seat expended.
- **Origination Airport:** Choose the airport the Traveler departed from. The User can enter it in by airport code or location.
- **Destination Airport:** Choose the airport the Traveler traveled to. The User can type it in by airport code or location.
- **Attachments:** attach any Receipts that pertain to the purchase of this flight
 - If the payment method includes Exchange Tickets or Residual Travel Funds, upload all related airfare Receipts.
- Click **Save**.

➤ Air Wi-Fi

- **Date:** Enter the date the expense was paid.
- **Spent:** Enter the amount of the requested reimbursement.
- **Description (Required):** Enter the business justification for the Wi-Fi expense.
- **Attachments:** Attach the Receipt for the Wi-Fi charge.

➤ Baggage Fee

- **Date:** Enter the date the expense was paid.
- **Spent:** Enter the amount of the requested reimbursement
- **Description (Optional):** Business Justification is required for more than one (1) baggage fee and/or oversized bag per flight.
- **Attachments:** Attach the baggage fee Receipt(s).

➤ Seat Upgrade Fee

- **Date:** Enter the date the expense was paid.
- **Spent:** Enter the amount of the requested reimbursement.
- **Description (Required):** Enter the business justification for the Seat Upgrade expense.
- **Attachments:** attach the Receipt for the Seat Upgrade.

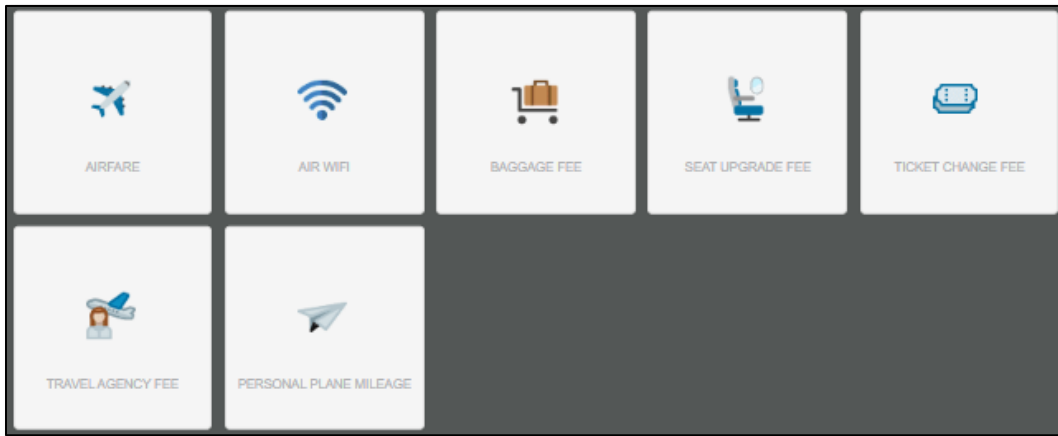


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ADD FINAL EXPENSE REPORT EXPENSES: AIRFARE

Airfare: Choose the tile that best matches the reimbursement expense.



➤ **Ticket Change Fee**

- **Date:** Enter the date the expense was paid.
- **Spent:** Enter the amount of the requested reimbursement.
- **Description (Required):** Enter the business justification for the Ticket Change Fee.
- **Attachments:** Attach the Receipt for the Ticket Change Fee.

➤ **Travel Agency Fee**

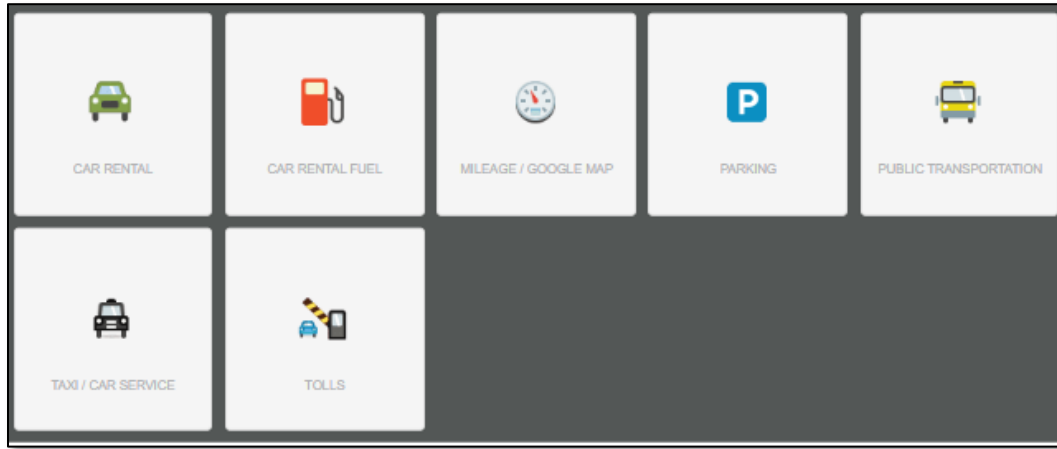
- **Date:** Enter the date the expense was paid.
- **Spent:** Enter the amount of the requested reimbursement.
- **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Travel Agency:** Choose the travel agency that was used for the expense. **NOTE:** Anthony Travel is to be used by Athletics ONLY.
- **Attachments:** attach the travel agency fee Receipt.

➤ **Personal Plane Mileage-** **NOTE:** Presidential approval must be obtained and attached to the Expense Report. This must comply with TTU System Regents' Rules and the Texas Comptroller guidelines.

- **Date:** Enter the date the mileage is being requested.
- **Spent:** This will be calculated automatically based on the miles input and the Comptroller's Guidelines.
- **Personal Plane:** Choose the aircraft type that best matches the plane.
- **Personal Plane Rate:** This is automatically calculated based on the rate provided by the Texas Comptroller.
- **Miles:** Enter the number of aeronautical miles flown.
- **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Attachments:** Attach documentation showing the number of miles flown. The User can use an Air Mileage Calculator to determine the miles flown. (<https://www.airmilescalculator.com/>)

ADD FINAL EXPENSE REPORT EXPENSES: GROUND TRANSPORTATION

Ground Transportation: Choose the tile that best matches the reimbursement expense.



➤ Car Rental

- **Date:** Enter the date the rental was paid.
- **Spent:** Enter the Final payment amount.
- **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Rental Agency:** Choose the vehicle rental vendor used. **NOTE:** If Other is chosen, the User will need to enter the vendor used.
- **Class:** Select the class of vehicle driven.
- **Pick-up date:** The date the vehicle was picked up.
- **Return Date:** The date the vehicle was returned.
- **Number of days:** This will automatically calculate based on the pickup and return dates.
- **Pickup Location:** Type in the name of the city where the rental was picked up.
- **Attachments:** Attach the Final Receipt that shows the vehicle details and the method of payment used.

➤ Car Rental Fuel- This tile is not to be used for personal vehicle fuel Receipts (when requesting fuel instead of mileage). Personal fuel Expenses must be entered under Miscellaneous/Other.

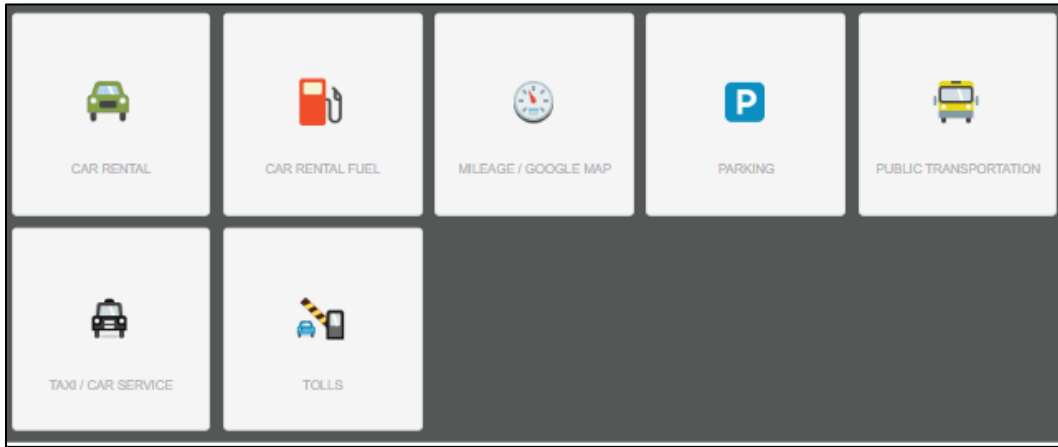
- **Date:** Enter the date the fuel charge was paid.
- **Spent:** Enter the Final payment amount. **NOTE:** Expenses must be submitted separately and not combined into one amount.
- **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Attachments:** Attach the fuel Receipt(s).

➤ Mileage/ Google Map

- **Date:** If entering an individual trip, enter the departure date. If entering monthly mileage, enter the first day of the month.
- **Spent:** This will automatically enter the amount based on the miles driven and mileage reimbursement rate.
- **Description:** If using the Calculate Mileage feature, nothing needs to be entered here. The Mileage feature will add the locations to the description. If the User is entering miles driven manually, the User will need to detail out the departure and Origination locations in the description box.
- **Mileage Type:** Select Individual trip or Monthly Mileage.
- **Rate:** This is automatically entered.
- **Miles:** The User can manually enter the miles driven if using an odometer log for monthly mileage or use the **Calculate Mileage** feature for individual or monthly trips.
 - Within the Calculate Mileage feature, the User will need to enter the Origination and Destination locations.
- **Deduction:** This is used by approvers to reduce the number of miles driven if necessary.
- **Attachments:** A Google Map will add to the tile once the Calculate Mileage screen is saved. If odometer logs are being submitted, attach it here.

ADD FINAL EXPENSE REPORT EXPENSES: GROUND TRANSPORTATION

Ground Transportation: Choose the tile that best matches the reimbursement expense.



➤ **Parking**

- **Date:** Enter the date the expense was paid.
- **Spent:** Enter the requested reimbursement amount.
- **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Attachments:** Receipts are only required if the expense exceeds \$100.00.

➤ **Public Transportation:** (Metro, Train, Bus, Subway, etc.)

- **Date:** Enter the date the expense was paid.
- **Spent:** Enter the requested reimbursement amount. **NOTE:** Expenses must be submitted separately and not combined into one amount.
- **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Origination:** The departure location.
- **Destination:** The arrival location.
- **Attachments:** Attach the expense Receipt.

➤ **Taxi/ Car Service**

- **Date:** Enter the date the expense was paid
- **Spent:** Enter the requested reimbursement amount. **NOTE:** Expenses must be submitted separately and not combined into one amount.
- **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Service Type:** Enter the type of service used.
- **Origination:** The departure location.
- **Destination:** The arrival location.
- **Attachments:** Attach the Taxi/ Car Service Receipt(s).

➤ **Tolls**

- **Date:** Enter the date the expense was paid.
- **Spent:** Enter the requested reimbursement amount.
- **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Attachments:** Attach the toll Receipt(s).



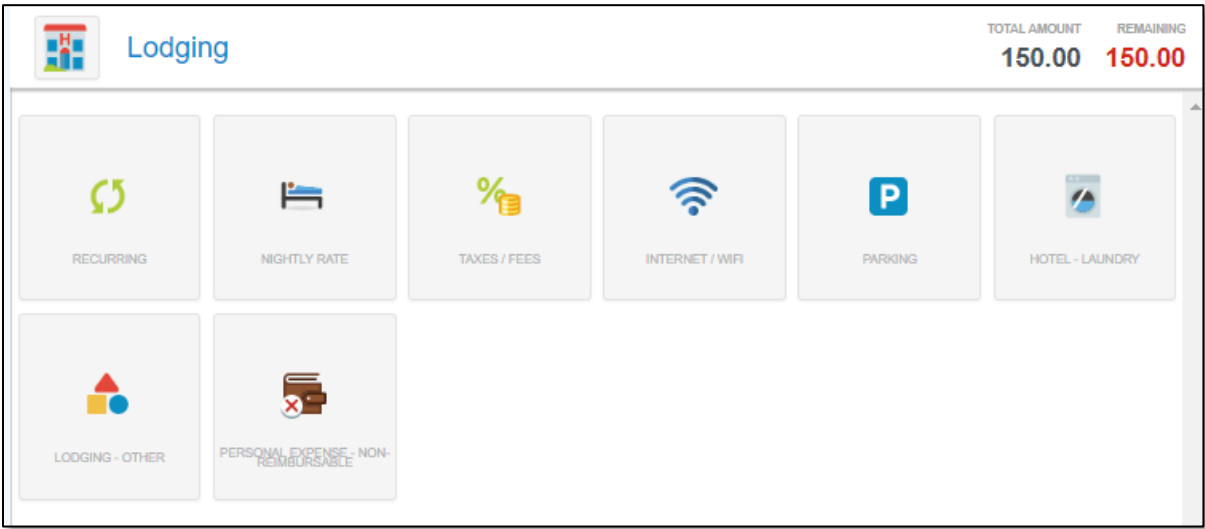
ADD FINAL EXPENSE REPORT EXPENSES: LODGING

LODGING: Choose the tile that best matches the reimbursement expense.




- **Lodging:**
- **Date:** Enter the date the lodging was paid.
 - **Check-In Date:** Enter the check-in date.
 - **Check-Out Date:** Enter the check-out date.
 - **Spent:** Enter the Final lodging amount. (Be sure to include any personal or non-reimbursable Expenses).
 - **Allowable Total:** Click the blue Calculate button. Enter the requested information and calculate the allowable total for the lodging location.
 - **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
 - **Merchant Name:** Enter the vendor’s full name (hotel).
 - **Attachments:** Attach the Final lodging Receipt, including the daily itemized charges and evidencing a zero balance.
 - Click **Itemize**.

Choose the tile that best describes the expense line item on the Receipt. The amounts in the upper right corner will show the User the total amount remaining that must be itemized. See tile examples below.





ADD FINAL EXPENSE REPORT EXPENSES: LODGING


LODGING: Choose the tile that best matches the reimbursement expense.


Lodging


TOTAL AMOUNT150.00REMAINING150.00


RECURRING


NIGHTLY RATE


TAXES / FEES

INTERNET / WIFI


PARKING

HOTEL - LAUNDRY

LODGING - OTHER

PERSONAL EXPENSE - NON-REIMBURSABLE

- **Recurring:** this tile will be used when the itemized nightly rate, taxes/ fees, parking, and/or Wi-Fi Expenses are the same for each day.
- **Date:** Enter the date the expense was paid. this tile will be used when the itemized nightly rate, taxes/ fees, parking, and/or Wi-Fi Expenses are the same for each day.
 - **Check-In Date:** Enter the check-in date.
 - **Check-Out Date:** Enter the check-out date.
 - **Nights:** This will automatically calculate based on the check-in and check-out dates
 - **Lodging:** Enter the nightly lodging rate.
 - **Taxes/Fees:** Enter the combined daily taxes/fees amount. **NOTE:** Do not include the State- Occupancy Taxes when traveling within Texas
 - **Internet/ Wi-Fi:** Enter the amount of the Wi-Fi charges.
 - **Parking:** Enter the hotel parking/valet charges.


Recurring


TOTAL AMOUNT150.00REMAINING150.00


Check-in02/03/2023


Check-out02/05/2023

Nights2

Lodging0.00


Taxes / Fees0.00

Internet / WiFi0.00

Parking0.00


ADD FINAL EXPENSE REPORT EXPENSES: LODGING


LODGING: Choose the tile that best matches the reimbursement expense.


Lodging


TOTAL AMOUNT
150.00


REMAINING
150.00


RECURRING


NIGHTLY RATE


TAXES / FEES

INTERNET / WIFI


PARKING

HOTEL - LAUNDRY

LODGING - OTHER

PERSONAL EXPENSE - NON-REIMBURSABLE

- **Nightly Rate:** Enter each itemized daily expense separately.
- Enter each itemized daily expense separately.
 - **Date:** Enter the date of the expense.
 - **Spent:** Enter the amount of the nightly rate before taxes.
 - **Lodging Per Diem Rate:** This will automatically be entered based on the allowable total calculated on the lodging Header page.
 - **Amount over Per Diem Rate:** This will automatically show if the nightly rate exceeds the allowed per diem rate.
 - **Description (Optional):** Enter any information the Travel Office may need regarding this expense.

Nightly Rate

TOTAL AMOUNT
1,431.21

REMAINING
1,431.21

Date

02/04/2023

Spent

165.00

USD

Lodging Per Diem Rate

154.00


Amount over Per Diem Rate

11.00


Description
Optional


ADD FINAL EXPENSE REPORT EXPENSES: LODGING


LODGING: Choose the tile that best matches the reimbursement expense.


Lodging


TOTAL AMOUNT150.00REMAINING150.00


RECURRING


NIGHTLY RATE


TAXES / FEES

INTERNET / WIFI


PARKING

HOTEL - LAUNDRY

LODGING - OTHER

PERSONAL EXPENSE - NON-REIMBURSABLE

- **Taxes/Fees:** Add the taxes/ fees for each day. Do not include the State Occupancy Taxes when traveling within Texas. Enter each itemized daily expense separately.
- **Date:** Enter the date of the expense.
 - **Spent:** Enter the total amount of the taxes/fees.
 - **Restricted Fund Allocation:** Check this box when using restricted funds (11,12,14) to calculate the maximum amount allowed.
 - **Actual Nightly Rate:** Enter the actual amount charged per/ night.
 - **Tax Percentage:** This will automatically calculate the max tax allowed.
 - **Lodging Per diem Rate:** The system will automatically enter the locality per diem rate based on the Lodging Header amount calculated.
 - **Max Tax Allowed (Restricted):** The maximum amount allowed on restricted funds is provided here.
 - **Tax Overage:** If there is an amount here, the User will need to add a funding source to allow for the overage.
 - **Description (Optional):** Enter any information the Travel Office may need regarding this expense.

Taxes / Fees

Date02/20/2023

Spent25.00USD

Restricted Fund Allocation☒

Maximum allowed amounts must be calculated on restricted funds. If maximum amount is exceeded, provide a local FOP for overages.

Actual Nightly Rate165.00

Tax Percentage15.15


Lodging Per Diem Rate154.00

Max Tax Allowed (Restricted)23.33


Tax Overage1.67


ADD FINAL EXPENSE REPORT EXPENSES: LODGING


LODGING: Choose the tile that best matches the reimbursement expense.


Lodging


TOTAL AMOUNT150.00REMAINING150.00


RECURRING


NIGHTLY RATE


TAXES / FEES

INTERNET / Wi-Fi


PARKING

HOTEL - LAUNDRY

LODGING - OTHER

PERSONAL EXPENSE - NON-REIMBURSABLE

- **Internet/ Wi-Fi:** Enter each itemized daily expense separately.
 - **Date:** Enter the date of the charge.
 - **Spent:** Enter the amount of the internet charge.
 - **Description (Required):** Enter the business justification for the Wi-Fi expense.
- **Parking:** Enter each itemized daily expense separately.
 - **Date:** Enter the date of the charge.
 - **Spent:** Enter the amount of the parking charge.
 - **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Hotel-Laundry:** Enter each itemized daily expense separately. This tile is only allowed for trips in a duration of five (5) or more days.
 - **Date:** Enter the date of the charge.
 - **Spent:** Enter the amount of the laundry charge.
 - **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
 - **Check-In:** This will automatically populate based on the Header amounts.
 - **Check-Out:** This will automatically populate based on the Header amounts.
- **Lodging- Other:** Use this tile for items not included in the other lodging tiles.
 - **Date:** Enter the date of the charge.
 - **Spent:** Enter the amount of the expense.
 - **Description (Required):** Enter the business justification for the expense.
 - **Type:** Enter the type of expense from the dropdown. Enter the information in the description if the expense type is not in the drop-down.

Lodging - Other

Date04/01/2023

Spent0.00USD

Business justification required

Description

Type

Allocation

T-18C000-C13000-600 FUND: A

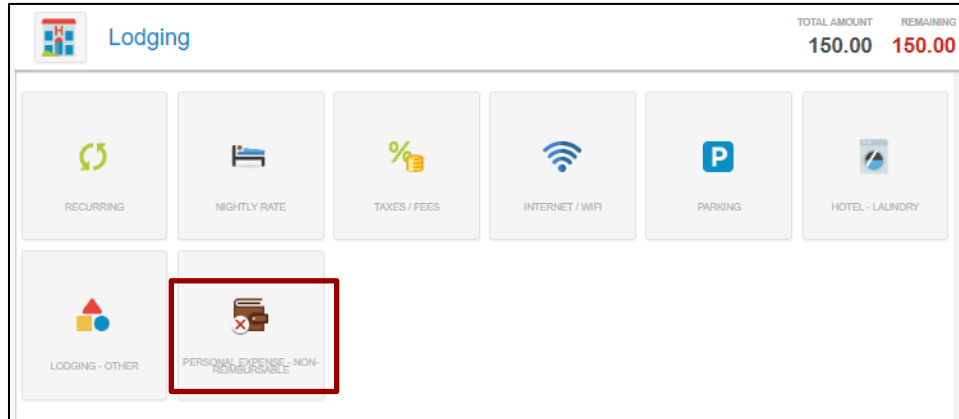
Add Allocation

Pres

CREATE PRESET

ADD FINAL EXPENSE REPORT EXPENSES: LODGING

LODGING: Choose the tile that best matches the reimbursement expense.



- **Personal Expense – Non-Reimbursable:** Use this tile to enter any Expenses that TTU will not reimburse.
 - **Date:** Enter the date of the charge(s).
 - **Spent:** Enter the amount of the expense(s).
 - **Description (Optional):** Enter any information the Travel Office may need regarding this expense(s).
 - **Allocation:** This will automatically enter the correct allocation.

- **Hotel Folio:** Receipts that are PDF or HTML text-based can be emailed to the User's Chrome River Dashboard, and FOLIO automatically creates a hotel expense in Chrome River—complete with such itemized Expenses as room charges, parking, and Internet fees—saving time and eliminating the potential for data-entry errors.
 - **NOTE:** Hotel Folio CANNOT be used for restricted, federal, or State-Appropriated funding.
 - Once the Receipt has been uploaded, it will be found in the **Offline** section of the E-Wallet, labeled "Folio Receipt."
 - **NOTE** that it may take 1–24 hours for OCR (Optical Character Recognition) to process the Receipt. The "Itemizing" indicator will show until it is complete.
 - The folio Receipt may be used immediately—even if it remains in the processing stage—to enter itemizations manually. However, the itemizations will be created automatically once the folio is done processing.
 - If only the triangle is displayed and not the stacked-squares icon, the itemizations are still being processed.



- Create a new Expense Report and click the + button to add line items.

ADD FINAL EXPENSE REPORT EXPENSES: LODGING

Hotel Folio:

←Expenses For
Dave Terry

+

Trip to Canada

0 Comments

0 Attachments

DATEEXPENSESPENTPAY ME

Click "+" to add your first item.

Expense Report
STAG21603027

Total Pay Me Amount
0.00 USD

Submit

Add
Expenses

Create New

E-Wallet

All

Trips

Credit Card

Offline

Travel Agency

Authorization

Purchase Card

Travel Data

Recycle Bin

E-Receipts

Receipt Gallery

Sort

Receipt

Taxi / Ride Share

08/29/2027

上车 Start 0829 0234

89.98 HKD

Receipt

Airfare

09/14/2027

American Airlines

377.40 USD

Folio Receipt

Hotel

10/09/2027

Hyatt Regency

510.81 USD

Receipt

Dinner

12/15/2027

Bourbon

580.57 USD

Receipt

Lunch

01/05/2028

280 Bleecker St

30.98 USD

Folio Receipt

Hotel

01/08/2028

192.40 CAD

- Find the desired Hotel Folio Receipt in the E-Wallet, check its box, and click **ADD**.
- Fill in the necessary expense details and click **ITEMIZE**.
- Review the Expenses that were pulled in from the Receipt, verify the amount remaining is 0.00 and click **DONE**.

Add Itemization

Done

Hotel

Total Amount
510.81

Remaining
0.00

RECURRING

ROOM RATE

ROOM TAX

PARKING

INTERNET

MEALS

MISC

PERSONAL CHARGE

- All itemizations from the forwarded hotel folio have automatically been added to the report.

T

TEXAS TECH UNIVERSITY

Procurement Services™

Rev-06-2023

ADD FINAL EXPENSE REPORT EXPENSES: LODGING

Hotel Folio:

Trip to Canada

DATE

EXPENSE

SPENT

PAY ME

Thu 11/12/2016	Hotel	510.81 USD	510.81
Mon 11/14/2016	Room Rate	149.00 USD	149.00
Mon 11/14/2016	Room Tax	10.84 USD	10.84
Mon 11/14/2016	Room Tax	10.43 USD	10.43
Tue 11/15/2016	Room Rate	149.00 USD	149.00
Tue 11/15/2016	Room Tax	10.84 USD	10.84
Tue 11/15/2016	Room Tax	10.43 USD	10.43
Wed 11/16/2016	Room Rate	149.00 USD	149.00
Wed 11/16/2016	Room Tax	10.84 USD	10.84
Wed 11/16/2016	Room Tax	10.43 USD	10.43

Expense Report 010022245608

Total Pay Me Amount 510.81 USD

Submit

Hotel

Total Amount 510.81

Remaining 0.00

Date 11/17/2016

Spent 510.81 USD

Description stay

Allocation 0000-00-00 Reimbursable Default Accounting

Downloaded Details

Receipt

Comments (0)

Add Comment

Post

Attachments (2)

Drag image here to upload

Add Attachments

1 of 1

- **Apartment/Long Term Rental:** Receipts that are PDF or HTML text-based can be emailed to the User’s Chrome River Dashboard, and FOLIO automatically creates a hotel expense in Chrome River—complete with such itemized Expenses as room charges, parking, and Internet fees—saving time and eliminating the potential for data-entry errors.
- **Date:** Enter the beginning date of the charge.
 - **Spent:** Enter the full and Final amount of the charge.
 - **Check-In Date:** Enter the F-in date.
 - **Check-out date:** Enter the date of checkout.
 - **Duration of Rental:** This will automatically calculate based on the dates entered in check-in and check-out.
 - **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
 - **Attachments:** Attach a copy of the Itemized Receipt and a copy of the lease.

NOTE: Departments do not have the authority to sign any lease in Texas Tech University’s name. Please contact Contracting@ttu.edu for assistance with the lease.

Apartment / Long Term Rental

Attach a copy of the lease and receipt to the expense report

Date

01/01/2023

Spent

1,500.00

USD

Check In Date

01/01/2023

Check Out Date

01/31/2023

Duration of Rental

31

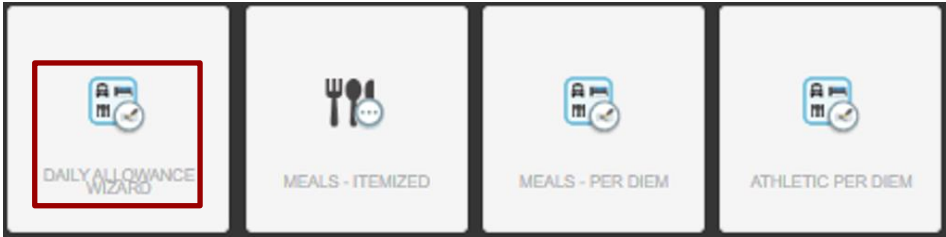
Description

Optional

test

ADD FINAL EXPENSE REPORT EXPENSES: MEALS

MEALS: Choose the tile that best matches the reimbursement expense.



- **Daily Allowance Wizard:** This is only to be used when claiming meals itemized (actual amounts). The User must enter the Daily Allowance Wizard before any Expenses are added to the Expense Report. The Allowance Wizard will have a blue border on it if it is entered correctly.

Daily Allowance Wizard

Start Date: 02/04/2023 00:00

End Date: 23:59

Days: 0

Location: Search for Location

NOTE: If the screen looks like this below, delete the added Expenses, and enter the Daily Allowance Wizard first.

Daily Allowance Wizard

Start Date:

End Date:

Days: 0

Location: Search for Location

- **Start Date:** Enter the start date of the trip.
- **End Date:** Enter the date the Traveler returned to the Designated Headquarters
- **Days:** This will automatically calculate based on the start and end date of the Final amount of the charge.
- **Location:** Enter the location of the business travel. If there were more than one location, enter the dates and locations separately.
- Click Preview
- The preview shows the User the allowable spend for each day and lets the User select deductibles, if necessary. Click **APPLY**.

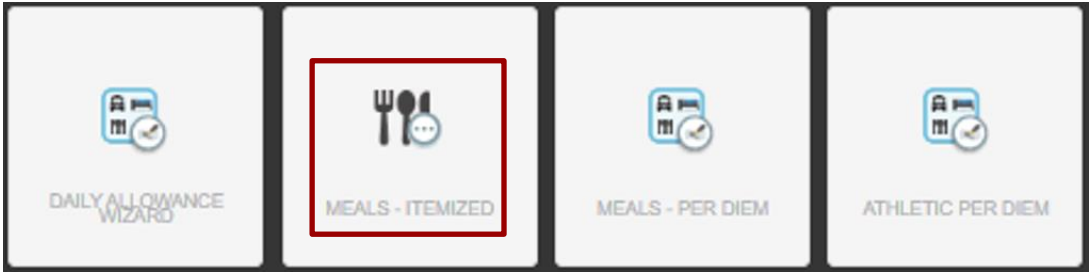
Per Diem Rates Preview

Wed 11/15/2017 00:00-23:59	San Francisco, United States of America	348.00 EUR		
DEDUCTIBLES				
<input type="checkbox"/> Breakfast	<input type="checkbox"/> Lunch	<input type="checkbox"/> Dinner		
<input type="checkbox"/> Travel Day	<input type="checkbox"/> Additional Deduction			
Thu 11/16/2017 00:00-23:59	San Francisco, United States of America	365.00 EUR		
Fri 11/17/2017 00:00-23:59	San Francisco, United States of America	348.00 EUR		

Clear All Apply

ADD FINAL EXPENSE REPORT EXPENSES: MEALS

MEALS: Choose the tile that best matches the reimbursement expense.



- **Meals Itemized:** When claiming actual meal costs, the User must first calculate the daily allowance amount BEFORE any Expenses are added to the Expense Report. If the User claims Per Diem Meals, the User should not use the Daily Allowance Wizard.
- **Date:** Enter the date of the meal Expenses.
 - **Spent:** This will automatically calculate based on the amounts entered below.
 - **Description (Optional):** Enter any information the Travel Office may need regarding these Expenses.
 - **Breakfast, Lunch, and Dinner Amounts:** Enter the amount of the meal(s) purchased.
 - **Apply Daily Allowance:** This is automatically checked and cannot be unchecked.
 - The daily allowance field shows the amount claimed per day and the amount that is over the allowed locality per diem rate.

Meals - Itemized

Date

Spent

0.00

USD

Description
Optional

Breakfast Amount

Lunch Amount

Dinner Amount

Apply Daily Allowance

☒

Daily Allowance

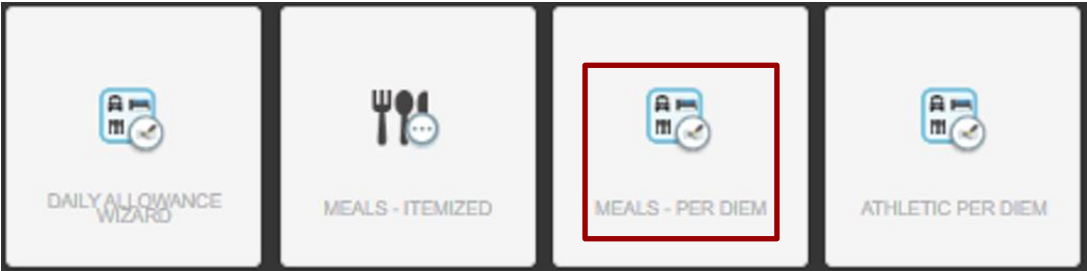
This expense will be applied towards your daily allowances as shown below. In accordance with your company policy, you will need to create Allocations using the information below.

VIEW DETAILS

TYPE	APPLIED AMOUNT (USD)
Meals	0.00

ADD FINAL EXPENSE REPORT EXPENSES: MEALS

MEALS: Choose the tile that best matches the reimbursement expense.



➤ **Meals Per Diem: Single Day:**

- **Select Single Day** **SINGLE DAY** and enter the date the User claims per diem.
NOTE: Meals are not allowed for trips without an overnight stay.
- **Spent:** This will remain greyed out and automatically calculated based on the daily amount and travel dates.
- **Select for First and Last Days of Travel:** This will adjust the amount spent for the first and last days of travel based on TTU/TTUS policy. **NOTE:** TTU’s travel meal policy follows the GSA’s 75% First and Last day of travel. Please see the Travel Manual for more information.
- **Daily amount:** Enter the max per diem amount for the location. Click the GSA Reference link for the rates.

A screenshot of the 'Meals - Per Diem' form. At the top, there's a 'Meals - Per Diem' header with a blue icon. Below it, there are two tabs: 'SINGLE DAY' (selected) and 'MULTI-DAY'. The 'Date' field shows '02/01/2023' with a calendar icon. A blue instruction bar says: 'Enter the daily per diem amount in the Daily Amount field below. For the first and last day of travel, enter the dates separately. The GSA Per Diem rates can be found in the link below.' The 'Spent' field shows '44.25' and 'USD'. The 'Select for first and last days of travel' checkbox is checked. The 'Daily Amount' field shows '59.00'.

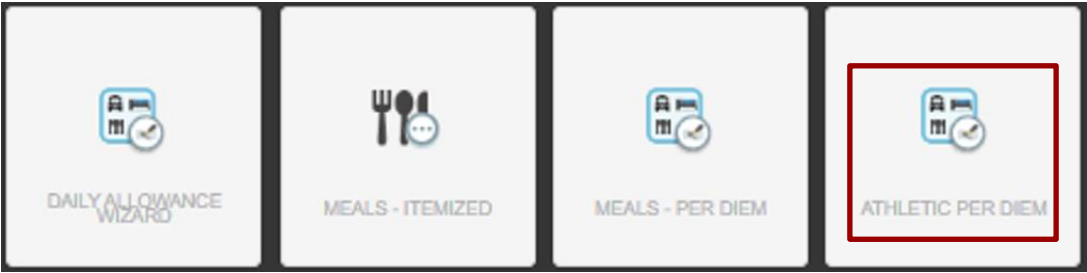
➤ **Meals Per Diem: Multi-Day:**

- **Select Multi-Day** **MULTI-DAY** and enter the first and last day of the travel dates. Once the User has entered all the information for the first and last days, the User will go enter the middle days the same way.
- **NOTE:** Be sure to **Clear Selection** **BEFORE** entering the travel dates.
- **Spent:** This will remain greyed out and automatically calculated based on the daily amount and travel dates.
- **Select for the first and last days of travel:** This will adjust the amount spent for the first and last days of travel.
NOTE: TTU’s travel meal policy follows the GSA’s 75% First and Last day of travel. Please see the Travel Manual for more information.

A screenshot of the 'Meals - Per Diem' form. At the top, there's a 'Meals - Per Diem' header with a blue icon. Below it, there are two tabs: 'SINGLE DAY' and 'MULTI-DAY' (selected). The 'Date' field shows '0 Days Selected' and a calendar icon. A blue instruction bar says: 'Enter the daily per diem amount in the Daily Amount field below. For the first and last day of travel, enter the dates separately. The GSA Per Diem rates can be found in the link below.' The 'Spent' field shows '44.25' and 'USD'. The 'Select for first and last days of travel' checkbox is checked. The 'Daily Amount' field shows '59.00'.

ADD FINAL EXPENSE REPORT EXPENSES: MEALS

MEALS: Choose the tile that best matches the reimbursement expense.



➤ **Athletic Per Diem: Athletics Use Only!**

- Select either Single Day or Multi-Day.
- For Single Day, enter the date(s) the User is claiming per diem.
- For Multi-Day, enter the date range that the User is claiming per diem.
- **NOTE:** Be sure to **Clear Selection** BEFORE entering the travel dates.
- **Spent:** This will remain greyed out and automatically calculate based on the daily amount and travel dates.
- **Athletic Travel Type:** Choose whether the trip is domestic or international.
- **Daily Amount:** This will automatically enter based on domestic or international. If the Traveler is approved for a higher per diem amount, enter the amount in this section and attach the approval.

Athletic Per Diem

SINGLE DAYMULTI-DAY

1 Days SelectedClear Selection

February 2023

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28			

For the first and last day of travel, enter the dates separately.

Spent

42.00USD

Athletic Travel TypeOptional

Domestic

Select for first and last days of travel

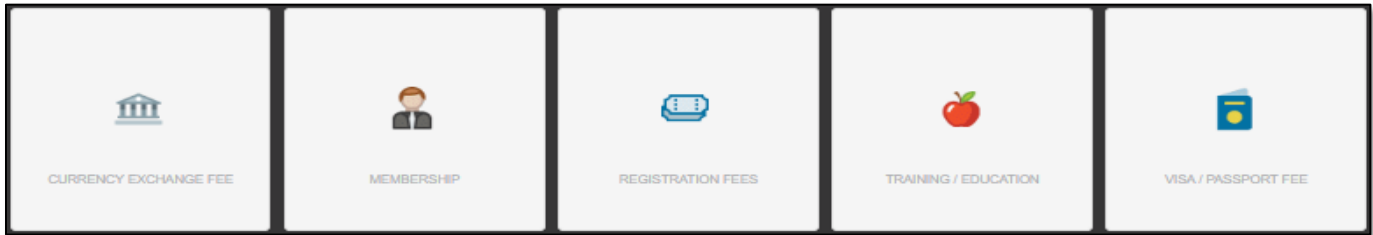
☐

Daily Amount

42.00

ADD FINAL EXPENSE REPORT EXPENSES: DUES/FEES

DUES/FEES: Choose the tile that best matches the reimbursement expense.



➤ **Currency Exchange Fee:**

- **Date:** Enter the date of the charge.
- **Spent:** Enter the amount of the currency exchange fee.
- **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Attachments:** Attach an itemized Receipt for this expense.

➤ **Membership:**

- **Date:** Enter the date of the charge.
- **Spent:** Enter the amount of the membership charge.
- **Description (Required):** Provide a statement advising why a PCard was not utilized for this expense.
- **Approved Professional Society:** Choose the appropriate professional society.
NOTE: If the appropriate professional society is not on the list, please request it to be added before the Expense Report can be submitted.
- **Attachments:** Attach an itemized Receipt for this expense.

➤ **Registration Fees:**

- **Registration Fee Type:** Choose the type of registration that was purchased.
- **Date:** Enter the date of the charge.
- **Spent:** Enter the amount of the registration fee.
- **Description (Required):** Provide a statement advising why a PCard was not utilized for this expense.
- **Attachments:** Attach an itemized Receipt for this expense.

➤ **Training/ Education**

- **Date:** Enter the date of the charge.
- **Spent:** Enter the amount of the training/ education charge.
- **Description (Required):** Provide a statement advising why a PCard was not utilized for this expense.
- **Attachments:** Attach an itemized Receipt for this expense.

➤ **Visa/ Passport Fee**

- **Date:** Enter the date of the charge.
- **Spent:** Enter the amount of the visa/ passport fee.
- **Description (Required):** Provide a business justification for this charge.
- **Attachments:** Attach an itemized Receipt for this expense.

ADD FINAL EXPENSE REPORT EXPENSES: MISCELLANEOUS

Miscellaneous/Other: Choose the tile that best matches the reimbursement expense.



- **Travel Advance Return:** The Delegate will use this tile when the Traveler has an unused Travel Advance, as the Delegate cannot submit a negative Expense Report. The Delegate will need to add the Advance to the Expense Report before the Travel Advance Return tile is added. From the eWallet, the Delegate will choose Travel Advances.

Choose the appropriate Advance from the eWallet and add it to the Expense Report by clicking the checkbox above the amount & click.



Details from the Advance will populate on the screen. Click Save.

Cash Advance

Date

03/04/2023

Spent

-100.00 USD

Business Purpose

Cash Advance Request

Description

Trip Start Date: 03/04/23, Trip End Date: 03/23/23; Expense Owner: R11775783
Prepaid to Traveler - Banner Inv#0386707; CR Report ID: QA0030219541

Allocation

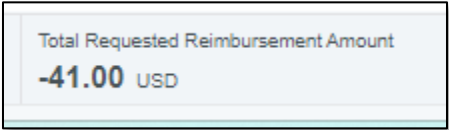
T-Advance - Chart T - Advance

Downloaded Details

Travel Advance

- **Fund:** Enter the fund for the expense- It should be the same one that was entered on the Advance.
- **Date:** Enter the date the Delegate is entering the expense.
- **Spent:** Enter the amount of the Advance return.
- **Description (Optional):** Enter any information the Travel Office may need regarding this expense.
- **Attachments:** Attach a copy of the deposit slip showing the return was made to Cash and Credit Management (University Deposits). DO NOT attach a copy of the check.

If the Total Requested Reimbursement is positive, the User will NOT need to add the Travel Advance Return Tile. However, if the Total Requested Reimbursement is negative, the Travel Advance Return tile must be added to the Expense Report.



ADD FINAL EXPENSE REPORT EXPENSES: MISCELLANEOUS

Miscellaneous/Other: Choose the tile that best matches the reimbursement expense.



➤ **Miscellaneous/ Other:**

- **Date:** Enter the date of the expense.
- **Spent:** Enter the amount of the expense.
NOTE: Expenses must be submitted separately and not combined into one amount.
- **Type:** Choose the option that best matches reimbursement expense.
- **Description (Required):** Provide a business justification for this charge.
- **Attachments:** Attach an itemized Receipt for this expense.

Miscellaneous / Other

Date

Spent

USD

Type

-- Select --

Business justification required

Description

ADD FINAL EXPENSE REPORT EXPENSES: FOOD AND ENTERTAINMENT

Food and Entertainment: This tile is not for individual meal entries. This will be used for business meals purchased in Travel Status or for a group. These Expenses must comply with Operating Policy and Procedure [72.05 Expenditures for Official Functions, Business Meetings, and Entertainment](#)



➤ **Food & Entertainment:**

- **Date:** Enter the date of the Expense
- **Spent:** Enter the amount of the Expense
- **Description (Required):** Enter any information the Travel Office may need regarding this Expense.
- **Attachments:** Attach a completed Food and Entertainment form and an itemized Receipt for this Expense.

Food and Entertainment

Date

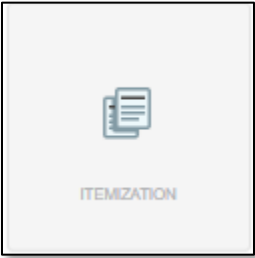
Spent

USD

A completed Food and Entertainment Form must be attached in addition to the itemized receipt. This does not include individual meal expenses or per diem.

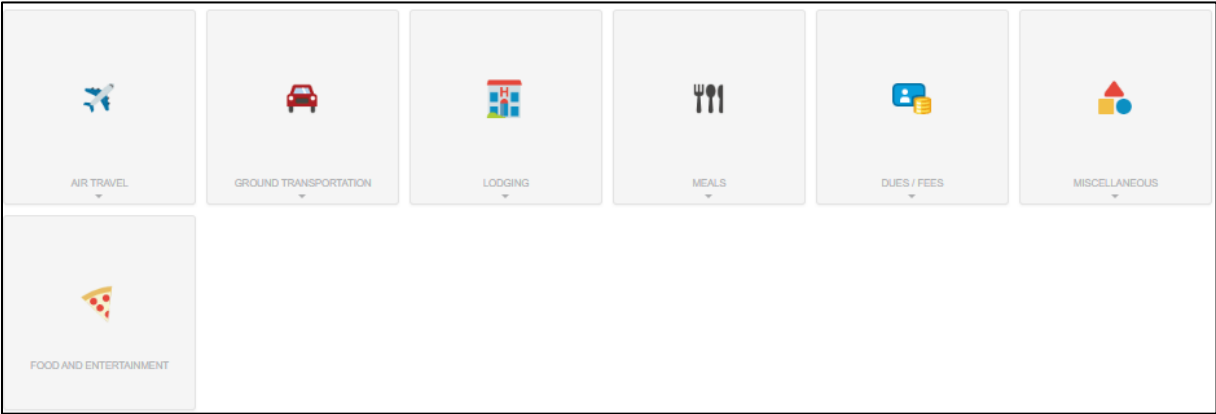
Description

ADD FINAL EXPENSE REPORT EXPENSES: ITEMIZATION



➤ Itemization:

- **Date:** Enter the date of the Expense(s).
- **Spent:** Enter the total amount of the Expense.
- **Description (Optional):** Enter any information the Travel Office may need regarding this Expense.
- **Attachments:** Upload the itemized Receipt.
- **Click** Itemize
- Select the tile that best matches the Expenses.
 - Ex: If the Traveler’s Receipt includes airfare and baggage fees, the User would choose the Airfare Tile first, then choose Baggage Fees.



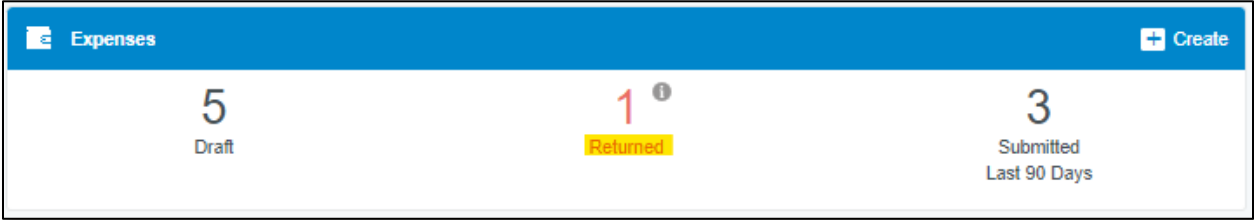
- Once the User enters the first Expense, the itemization tile will keep track of the remaining amount.

TOTAL AMOUNT	REMAINING
200.00	100.00

EXPENSE REPORT STATUS

- **Report Status:**
 - **Pending:** The Expense Report has been submitted and is pending approval
 - **Returned:** The Approver has sent the Expense Report back to the Expense Owner.
 - **Approved:** The Expense Report has been approved but has not yet been exported.
 - **Exported:** the approved Expense Report has been sent to Banner for processing.
 - **Paid:** The Expense has been posted in Banner, and a payment has been issued to the Traveler.

- **Returned Expense Reports:**
Click on the Returned section from the Dashboard to view the returned items' grid.



Scroll to the comments to view the reason for the return.


Auto Bot (Budget Checker) 09/14/2022 04:53 PM
Returned- T--11B000-B53020-7B0040-200-- 58.02: (Lodging - Taxes / Fees, Lodging - Taxes / Fees) Insufficient funds for this budget
S--16A001-S00000--600--: (Lodging - Taxes / Fees, Lodging - Nightly Rate, Lodging - Taxes / Fees, Lodging - Nightly Rate) Error checking budget- *ERROR*

Click on the Open tab to make corrections. The User may also view the PDF, submit it, or delete it. Click on the returned line item. If no changes are needed, click on Submit.

If correcting, click on the Edit tab. Make required changes, add comments if needed, Save, and Submit.

NOTE: Returned Expense Reports do not require a second approval or budget check from those individuals that approved prior to the Expense Report being returned.

If the Approver left a comment on a specific line item, click on the blue note icon to read it.

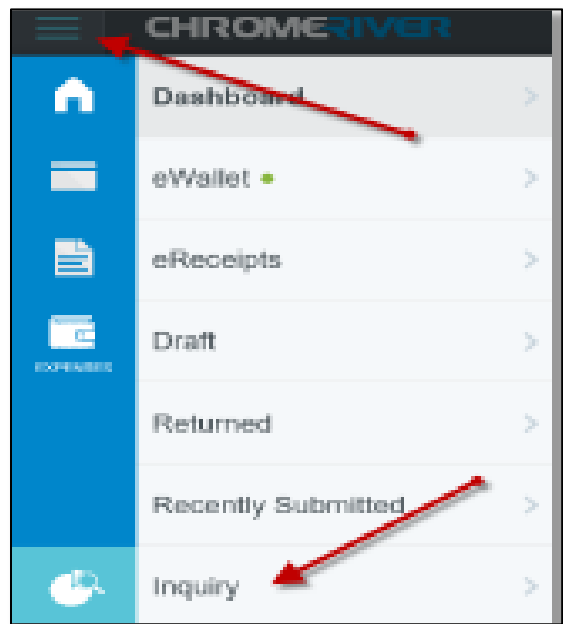
Wed 01/28/2016	TH	450.00 GBP	450.00		
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RECALL A REPORT

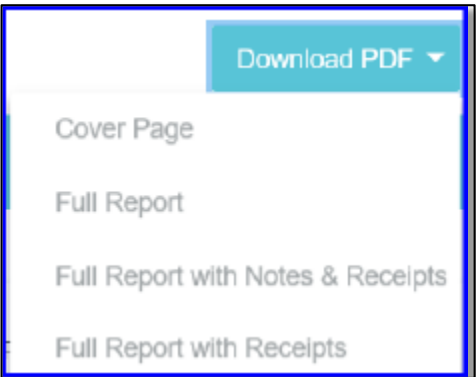
Recall Expense Routing allows Cardholders and Delegates to return any Expense Report to draft status if none of the line items have been fully approved. All line items must be in Pending Approval status to recall the Expense Report. When the Expense Report is resubmitted, the Expense Report will flow through all approval steps again.

INQUIRY (REPORTS)

Inquiry allows the User and the User’s Delegates to run reports on all activity by category. To access Inquiry Reports, click the MENU button in the top left corner of the Dashboard and click Inquiry.



- Click on the Expense link to open the available reports.
- Action Date – enter a date range.
- Click on an Expense Report to access Download PDF with the following options:



Available Inquiry Reports for Travel:

My Delegates
List of people I've entered expenses for

My Expense Approval Items
Expenses in approval process with each line item's allocation information

My Expense Calendar
Listing of expenses

My Expense Items
Listing of your itemized expenses within a specified date range. Sorted by: Transaction Date, Expense Type, and Amount.

My Expense Pre-Approvals
List of your Pre-Approvals.

My Expense Reports
Listing of your expense reports created within a specified date range. Sorted by: Create Date, Name, and Amount.

My Firm Paid Items
Expenses that are marked as firm paid

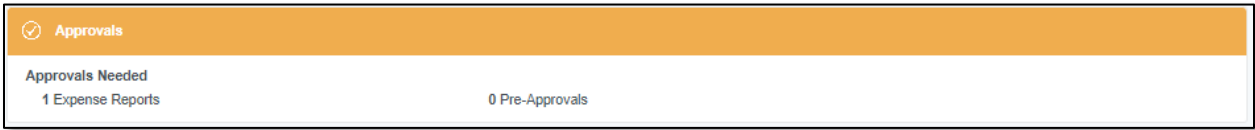
My Items
Listing of itemized expenses that were created from transactions.

My Paid Expenses
My Paid Expenses

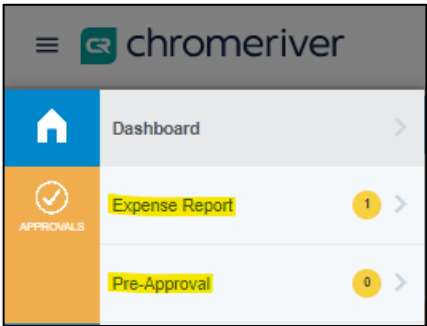
My Pre-Approval Approvals
Pre-Approvals in approval process.

APPROVALS IN CHROME RIVER SYSTEM

If the User has pending approvals, the User will see a yellow notification bar at the top of the Dashboard.



The User may also access approvals by tapping the menu  icon in the upper left-hand corner of the Dashboard. The yellow circle indicates the number of approvals requiring approval.

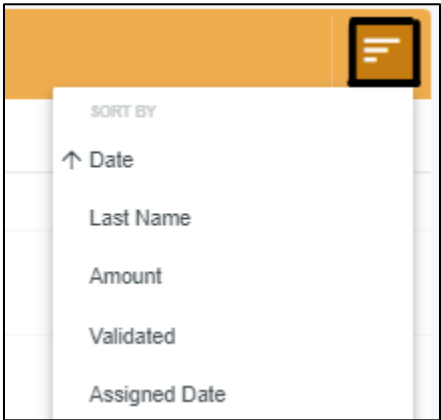


Click on the magnifying glass icon to search by Expense Owner or Report ID. Use the drop-down list to select.



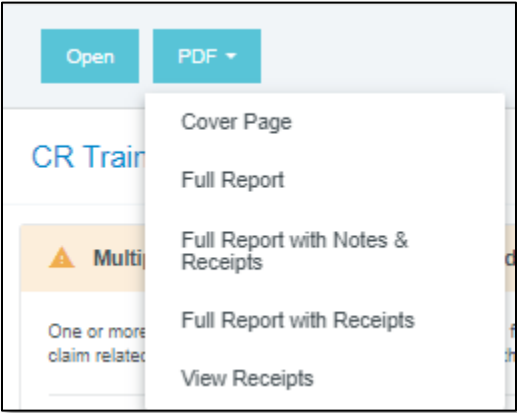
Expense Owner search allows the User to enter a name or title. Report ID search requires the full Expense Report ID.

Use the Sort button in the upper right-hand corner to sort by Date, Last Name, Amount, Validated (allows the grouping of all the Expenses that have warnings), and Assigned Date.



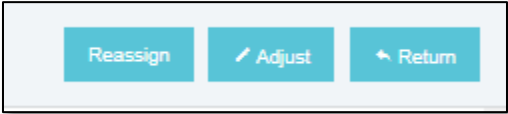
APPROVALS IN CHROME RIVER SYSTEM

Click on the Expense Report requiring review. The User will see a preview of the Expense Report that contains FOP allocation and Receipts. The User may Open, download a PDF, view Tracking, Return (will return entire report), or Approve from the preview page.



For detailed information, click on **Open** to view expense line-item detail. Click on the transaction to view the details. Opening an Expense report will allow the User to approve or return line items individually.

Return or Submit actions for the entire Expense Report are at the bottom of the page showing the Expense Report detail. A return comment is required for returned Expense Reports.



Adjust will allow the User to change the FOP allocation and will require a comment. **NOTE:** Budget checking will not occur for an FOP change at this stage. The Expense Owner or Delegate will have to Recall the document from the Expense Owner's Dashboard for budget checking to occur again.

Reassign allows the User to select another Delegate to approve the Expense Report. Once reassigned to another Delegate, the User will no longer be in the approval queue for that line item.

APPROVALS BY E-MAIL

Chrome River will email Expenses that require approval. The subject line will contain the Expense Owner's Name.

From the email, the Approver may approve all Expenses or return all Expenses to the Expense Owner by clicking on the **APPROVE** or **RETURN** button. To approve or return specific line items, the Approver will need to log into Chrome River. The Approver may click on View Receipts at the bottom of the email. The email will provide the allocated FOP(s) used, total Expense, Expense line-item category and amount, and compliance warning information (if applicable).

The Approver may add notes or comments to the Expense Report by entering it above the dotted line in the email that opens after clicking on **APPROVE** or **RETURN**.

ACTION REQUIRED		Chrome River
		<div>APPROVE</div> <div>RETURN</div>
Expense Report for	Taylor Layne Sinclair [Assistant Director / R11397374 / taylor.sinclair@ttu.edu]	
Created By	Caitlyn Bryanna Terrell	
Report Name	Testing Advances Delegate Submitted	
Submit Date	02/09/2023	
Expense Dates	02/18/2023 - 02/18/2023	
Total Expenses	500.00 USD	
Prior Approvers	Caitlyn Bryanna Terrell [02/09/2023 GMT]	
Start Date	02/18/2023	
End Date	02/20/2023	
Approver	Williams, Charlene M / Section Manager / Procurement Services	
Business Purpose	Athletics Travel	
Chart	T	
Destination	Florence, Toscana, Italy	
EHST_CHART	T	
Ethos Expense Owner	R11397374	
Ethos_Invoice	Y	
Ethos_Invoice_NoHold	Y	
Fiscal Year	FY23	
General Travel Report	Advance Request	
Type		
Origination	Lubbock, Texas, USA	
PA Report ID	QA0000945983	
Report Type	General Travel	
Traveler Type (T)	Athletic Team Travel	
Trip Purpose (T)	Intercollegiate Athletic	
Trip Type	Foreign	
Vacation taken on this trip	No	

Wed 11/25/2021 9:44 AM

expense-noreply-c5-prod@ca1.chromeriver.com

Chrome River Expense Approval [TTU Mechanical Engineering2 2464]




TEXAS TECH UNIVERSITY

Procurement Services™


APPROVALS BY E-MAIL

APPROVE Email:

 Send	To...	<input type="text" value="approve@expense.ca1.chromeriver.com"/>
	Cc...	<input type="text"/>
	Subject	Chrome River Expense Approval [TTU Mechanical Engineering2 2464]

1. Please VERIFY [from] e-mail address. Please use e-mail address associated to your Chrome River account.
2. Enter any optional NOTES in the space above this line to have them added to this expense report.
3. SEND this message to the Chrome River automated processing system for your action to be completed.

RETURN Email:

 Send	To...	<input type="text" value="return@expense.ca1.chromeriver.com"/>
	Cc...	<input type="text"/>
	Subject	Chrome River Expense Approval [TTU Mechanical Engineering2 2464]

1. Please VERIFY [from] e-mail address. Please use e-mail address associated to your Chrome River account.
2. Enter any optional NOTES in the space above this line to have them added to this expense report.
3. SEND this message to the Chrome River automated processing system for your action to be completed.

Report ID: 0100-2173-1873 Email UID: D708FDFC-3222-1A65-0F2A-5A0F6FAC42A3

Expense Report Approval Failure Notification


If the Approver attempts to approve an Expense Report via email that has since changed (The Expense Owner or Delegate has recalled or resubmitted the Report), the Approver will receive an Expense Approval Failure Notification.

COMPLIANCE RULES

Compliance Warning



A compliance warning indicates that additional information is required before the Expense can be submitted for approval and processing. The Expense Owner or Delegate may be required to provide documentation and/or post a response.



S&T-Expense Type not Valid with Single Day of Travel

S&T-Expense Type not Valid with Single Day of Travel


Add Response

Please enter a response...

Compliance Violations



A compliance violation indicates that the expense is ***not compliant*** and requires additional information prior to submission. The Expense Owner or Delegate will be required to make any necessary changes before submission of the Pre-Approval.



Lodging - User must calculate the Allowable Total

User must calculate the Allowable Total Lodging Expense based on locality and trip dates.

Compliance Rules

The list of all the compliance rules and the meaning behind each can be found on our website under the Chrome River Training and Work Aids.