



Chrome River – Travel Pre-Approval Reports

Pre-Approval Reports in Chrome River will encumber the traveler's estimated expenses for future reimbursement and send automated email notifications to the appropriate Fund Manager(s) and designated Approver. Electronic departmental approvals are not required for this report type.

Pre-Approval Reports will also handle requests for the use of TTUHSC Business Travel Accounts (BTA) for airfare. The traveler must qualify for the use of BTA and the report will be routed to Travel Administration for review and approval.

For more information on the BTA process, reference the [Travel Training Center](#).

Do not submit a Pre-Approval Report with a BTA request prior to reviewing BTA training. Requests to utilize the BTA for unqualified applicants will be denied.

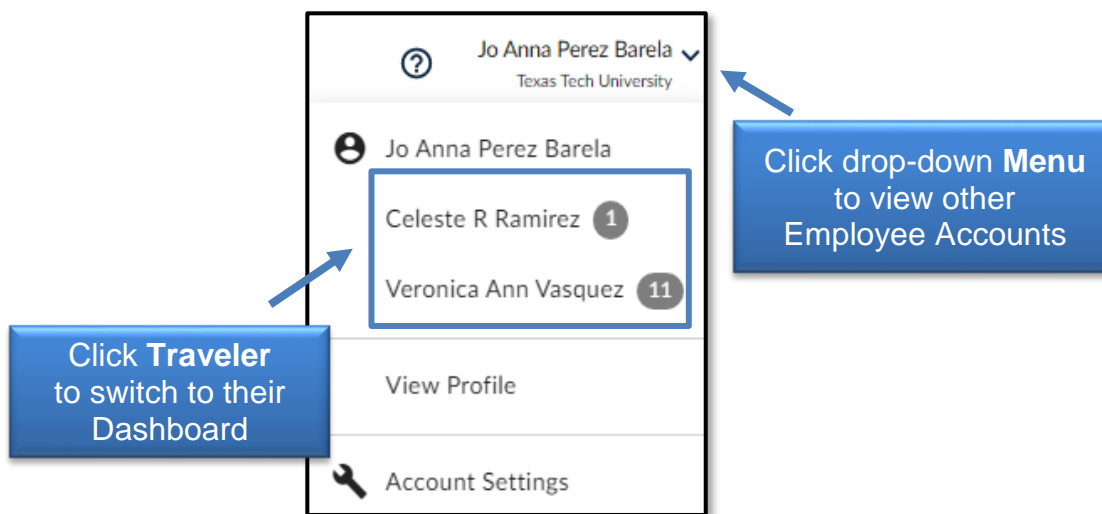
Travel Pre-Approval Report Submission

To submit a Pre-Approval Report, complete the following steps.

Confirm Traveler Dashboard

If you are an employee submitting your own pre-approval report, signing into Chrome River via SSO will automatically open your **own dashboard** for report submissions.

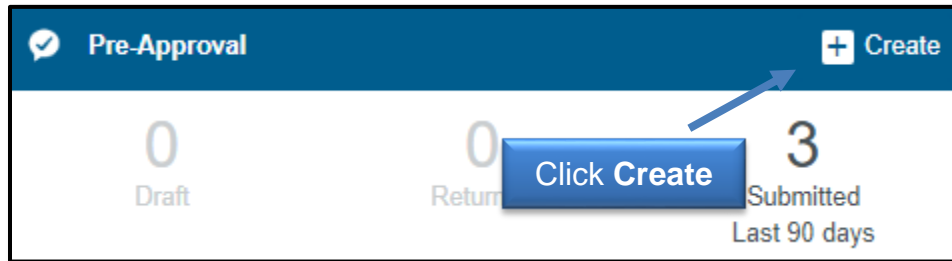
If you are a delegate for another employee and need to submit a pre-approval report on their behalf, click your **account name** in the top right corner. This will populate a drop-down menu that will list other employee accounts that have granted you delegate rights. Click the **correct traveler** to switch to their dashboard.



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Create New Pre-Approval Report

Click the **Create** button on the top right corner of the Pre-Approval bar.



Verify Basic Trip Information on Pre-Approval Report Header

Report Name – Traveler Last Name, First Initial - Trip Start Date, Destination City, State

Start Date/End Date – Verify when the traveler will depart from and return to their headquarters.

Number of Days – No action needed. Information is automatically calculated by the system, based on the trip dates provided.

Business Purpose – Enter the detailed reason for the trip that affirms the travel is related to TTUHSC business. Do not use acronyms.

A screenshot of the 'Pre-Approvals For Jo Anna Perez Barela' form. The form has a light blue header with a white checkmark icon and the text 'Pre-Approvals For Jo Anna Perez Barela'. Below the header, there are several input fields: 'Report Name' with the value 'Barela, J - 2/13/2023, Austin, TX'; 'Start Date' with the value '02/13/2023' and a calendar icon; 'End Date' with the value '02/16/2023' and a calendar icon; 'Number of Days' with the value '4'; and 'Business Purpose' with a text area containing the following text: 'Will be attending Emburse in Motion 2022 (2/14-2/15) and attending sessions related to Higher Education special interests and best practices for Reporting and Chrome River Admins . I will also be participating in a Customer Success Panel. This will be beneficial to ongoing configuration and maintenance of TTUHSC's Chrome River environment and processes for PCard and Travel.' At the top right of the form are 'Cancel' and 'Save' buttons. A blue callout box with the text 'Verify Trip Information in Pre-Approval Report Header' and an arrow points to the 'Start Date' and 'End Date' fields.

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Chart – This field verifies the Chart of Account (COA) that will be used for the trip and automatically populates **H** for TTUHSC funds.

Do not choose options E, S, or T unless TTUHSC El Paso, TTU System, or Texas Tech University funding is needed. **Only one chart per report is allowed.**

Traveler Type (H)/Trip Purpose (H) – Choose the appropriate selection from the options provided.

Approver – Search and select the traveler’s direct supervisor. If submission is for a non-employee, search and select the Department Head or Fund Manager.

Origination/Destination – Search and select the traveler’s origination and destination locations. If the individual is traveling to multiple locations for business, enter the furthest destination traveled.

Trip Type – **Do not alter.** The system will automatically determine the appropriate trip type based on the information entered in the Destination field.

BTA will be used – Select appropriate **No/Yes** option. If requesting BTA approval, you must choose **Yes** to ensure appropriate routing for approval.

Vacation Taken (checkbox) – If vacation will be taken during the trip, click this checkbox to view a Vacation Details field that will allow the entry of dates and further information.

Fiscal Year – Select the appropriate **Fiscal Year** that the travel will occur. If travel dates take place across two fiscal year periods, use the **trip end date** to determine correct FY.

The screenshot displays the Chrome River Travel Pre-Approval Report form. The form fields are as follows:

Chart	H
Traveler Type (H)	Employee
Trip Purpose (H)	Attend Conference
Approver	----- Turpin, Lora ...
Origination	Lubbock, Texas, USA
Destination	Austin, Texas, USA
Trip Type	In-State
BTA will be used	No
Vacation taken on this trip	<input checked="" type="checkbox"/>
Vacation Details	
Fiscal Year	FY23

A blue callout box with the text "Enter Information in Pre-Approval Report" and a blue arrow pointing to the "Origination" field is positioned to the right of the form.

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Allocations – Search and select the appropriate **FOP** for the trip expenses. If multiple FOPs will be used, choose **Add Allocation** to add a FOP.

Allocations

Select FOP

H-181183-201181-60 FUND: Purchasing (LOCAL) ORGN: Purchasing Lbk / PROG: Institutional Support

+ Add Allocation

Select Add Allocation to add FOP

After entering all information, click the **Save** button on the top right corner. The report progress will be saved and can now be viewed in the Pre-Approval Drafts Folder.

Add Supporting Documentation (If Applicable)

Supporting documentation can be uploaded to any pre-approval request but is only required for Pre-Approvals that include a BTA request. **BTA requests must include the Ticket Request provided by National Travel Systems.**

After saving the report header information, the system will display a blank pre-approval report on the left-hand panel. Click the **report name** to display the report header on the right-hand panel.

Scroll to the bottom of the report header to view the Attachments section and upload any **documentation**.

Pre-Approvals For Jo Anna Perez Barela

Barela, J - 2/13/2023, Austin, TX

EXPENSE ESTIMATED

Click "*" to add your first item.

Vacation taken on this trip

Fiscal Year FY23

Allocations

H-181183-20... FUND: ORGN: 0.00

Comments (0)

Add Comment Post

Attachments (0)

Drag image here to upload Upload Attachments

Click Report Name to display header

Select Upload Attachments

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Add Estimated Expenses to Pre-Approval Report

Click the + button on the top right corner of the report to add an expense.

The **Add Pre-Approval Types** option will appear on the right-hand panel and display the following expense drawers:


- **Airfare** – Airfare, Air Wi-Fi, Baggage Fee, Seat Upgrade Fee, Ticket Change Fee, Travel Agency Fee, and Personal Plane Mileage
- **Ground Transportation** – Car Rental, Car Rental Fuel, Mileage, Parking, Public Transportation, Tax/Car Service, and Tolls
- **Lodging** : Lodging and Apartment/Long Term Rental
- **Meals** : *Meals – Per Diem*, Meals – Itemized
- **Dues/Fees** – *Membership*, *Registration Fees*, *Training/Education*, and Visa/Passport Fee
- **Miscellaneous/Other** – (single expense tile)


NOTE: The expense types displayed above in *red italics* are not allowed on TTUHSC Travel Reports. TTUHSC Travel reimburses itemized meal expenses only and PCard is the preferred method of payment for Membership, Registration Fees, and Training/Education expenses. The system will not allow the submission of a TTUHSC Pre-Approval report with these line items.


Choose the appropriate expense type from the Pre-Approval options to enter your estimated cost.


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Add Pre-Approval Types



AIRFARE


GROUND
TRANSPORTATION


LODGING


MEALS



DUES / FEES


MISCELLANEOUS /
OTHER

Select a Pre-Approval Type

Enter the **Estimated Amount** and **additional information** in the optional Description field, click **Save**.

Click **Save** **Cancel** **Save**


Airfare

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

Estimated Amount

Description
Optional

BTA ☐

Enter Estimated Cost

Add Optional Description


After saving, the expense will be saved as a line item on the Pre-Approval report and be displayed on the left-hand panel.

Pre-Approvals For
Jo Anna Perez Barela

Barela, J - 2/13/2023, Au

0 Comments 0 Attachments

EXPENSE ESTIMATED

 Airfare	321.96 USD
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Line Item added to Pre-Approval Report

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The expense forms will provide additional information regarding any action needed on certain expense types. For example, the encumbrance of lodging expenses requires the calculation of maximum GSA rates for the dates and location of the stay. Click **Calculate** to view the Allowable Total Calculator.

Cancel Save

Lodging

Allowable total must be calculated

Allowable Total 0.00 USD Calculate

Estimated Amount 0.00 USD

Click Calculate

Enter the **correct start/end dates, location of the stay** and **single room** (multiple rooms are not allowed for reimbursement). Click **Save** to apply the calculated rates to your lodging expense tile.

Calculate Allowable Total

Start Date 02/13/2023

End Date 02/16/2023

Location Austin-Travis County, Texas (TX), United States

Rooms 1

Nights 3

Average Daily Room Rate 161.00 USD

Base Total

Allowable Total 483.00 USD

Enter Dates, Location and Single Room

Click Save

Cancel Save

The Lodging expense form will display the calculated amount, but the true estimated amount should still be entered in the **Estimated Amount** field.

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Cancel Save

Lodging

Allowable total must be calculated

Allowable Total 483.00 USD Calculate

Estimated Amount 597.00 USD

Description Optional Room cost is \$199 per night (including taxes/fees).

If your estimated expense exceeds the allowable total, overages are allowed on a Local FOP only.

Click the + button to continue adding estimated expenses to the report until all expenses have been added.

Saved estimated expenses can be edited or deleted prior to submission. To delete or edit, click the appropriate line item to view, and choose the **Delete** or **Edit** option.

Submit Pre-Approval Report

After adding all expenses and estimates, click **Submit** at the bottom of the left-hand panel.

Pre-Approvals For Jo Anna Perez Barela

Barela, J - 2/13/2023, Austin, TX

0 Comments 0 Attachments

EXPENSE	ESTIMATED
Airfare	321.96 USD
Lodging	597.00 USD
Meals - Itemized	192.00 USD
Taxi / Car Service	

Click Submit

PA Report ID QA0000967127 Total Estimated Amount 1,260.96 USD Submit

Chrome River – Travel Pre-Approval Reports

Submission confirmation and a report summary will be displayed on the right-hand panel. Click **Submit** if all information appears correct.

The screenshot shows the 'Submit Preapproval' form. At the top, there is a green header with the text 'Submit Preapproval'. Below the header, there is a yellow box containing a certification statement: '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.' To the right of this text is a blue button labeled 'Click Submit'. Below the yellow box, there are two buttons: a white 'Cancel' button and a green 'Submit' button. A blue arrow points from the 'Click Submit' button to the green 'Submit' button.

If a compliance violation is received after attempting to submit the report, click **Cancel** and take the appropriate action indicated on the violation message and resubmit.

The screenshot shows the 'Submit Preapproval' form with two compliance violations. The top part of the form is the same as the previous screenshot, but the 'Click Submit' button is now labeled 'Click Cancel'. Below the yellow box, there are two red boxes, each containing a warning icon (a triangle with an exclamation mark) and a message. The first message is: 'PCard preferred for Registration, Membership, and Training/Education expenses #613H1 Remove line item(s) from the Pre-Approval. If the traveler has already personally paid one of these expenses, contact travel@ttuhsc.edu for additional assistance.' The second message is: 'TTUHSC - Per Diem meal claims not allowed #613H2 Remove Meals Per Diem from Pre-Approval and use Meals Itemized. Traveler's meal reimbursements will be issued at the actual cost and must be supported by itemized meal receipts.' Below the red boxes, there are two buttons: a white 'Cancel' button and a green 'Submit' button. A blue arrow points from the 'Click Cancel' button to the white 'Cancel' button.

Travel Pre-Approval Report Routing

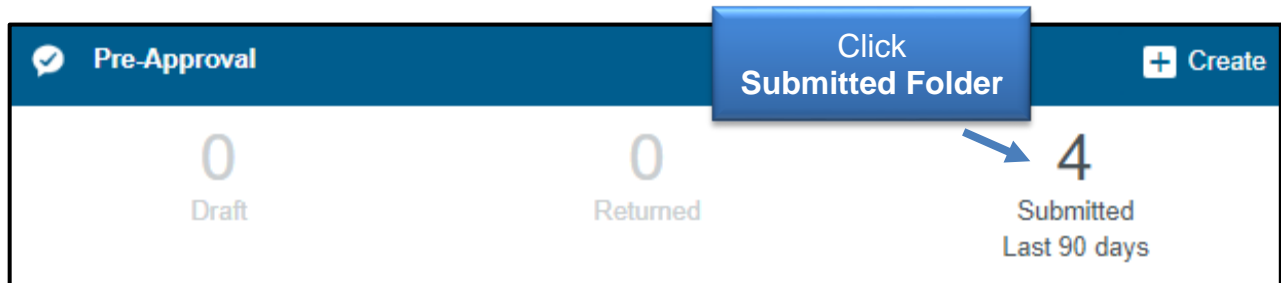
Submitted Pre-Approval Reports will be electronically routed as follows:

- Automated Budget Check
- Automated Email Notification to Approver – Supervisor chosen on Report Header
- Automated Email Notification to Fund Manager(s)
- Travel Office Approval – Applicable to BTA requests only
- Export to Banner for Encumbrance Creation
- Automated Email Notification of Completion to Delegate and Traveler – Banner encumbrance ID included.

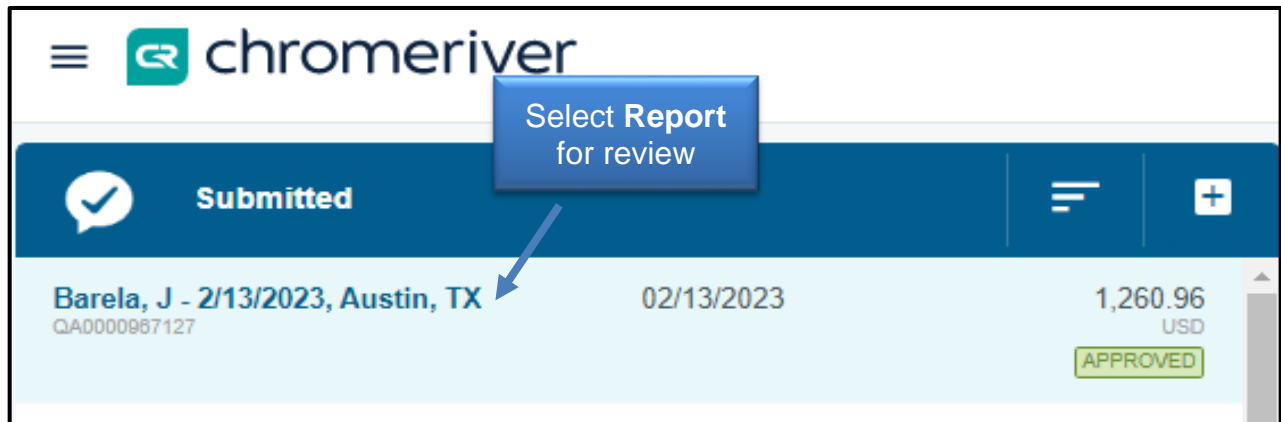
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Travel Pre-Approval Report Review & Cancellation

Submitted reports can be viewed in the Submitted Folder of the Pre-Approval Bar. Click the **Submitted Folder** (third option) to view all Pre-Approvals submitted on the current dashboard.



Once the Submitted Folder has been opened, select the **appropriate report** for review.



This will open a summary of the report on the right-hand panel with the following options:

- **Open** – Opens the report and allows a review of the pre-approval line items.
- **PDF** – Generates a PDF version of the Pre-Approval Report. **NOTE: Cash advance requests will require a copy of the traveler's related Pre-Approval Report PDF.**
- **Tracking** – Allows viewing of the status of the report line items.
- **Expire** – Cancels application and releases encumbered funds. **Do not expire an application unless the trip has been cancelled and no funds have been or will be reimbursed for the cancelled arrangements.**

Chrome River – Travel Pre-Approval Reports

Open	PDF ▾	Tracking	Expire	←	Click any of these Options
Barela, J - 2/13/2023, Austin, TX					
Report Owner	Jo Anna Perez Barela				
Created By	Jo Anna Perez Barela				
Create Date	02/13/2023				
Pay Me Amount	1,260.96 USD				←
PA Report ID	QA0000967127				
From Date	02/13/2023				
To Date	02/16/2023				
Business Purpose	Will be attending Emburse in Motion 2022 (11/2-11/3) and attending sessions related to Higher Education special interests and best practices for Reporting and Chrome River Admins . I will also be participating in a Customer Success Panel. This will be beneficial to on-going configuration and maintenance of TTUHSC's Chrome River environment and processes for PCard and Travel.				

For questions related to the appropriate use of the system or system issues, contact ChromeRiverHSC@ttuhsc.edu.

For all other travel related inquiries, contact Travel@ttuhsc.edu.