



CHROME RIVER TRAVEL DOCUMENTATION

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INTRODUCTION

Chrome River is an expense reporting web application that allows users to upload receipts, manage their expenses, and submit expense reports. Users can request cash advances, ask the District to pay vendors directly, or ask for payment reimbursement. The Chrome River expense reporting process requires two parts – the submission of a pre-approval report before you travel and the submission of an expense report after you travel.

GENERAL INFORMATION

HOW TO LOG IN TO CHROME RIVER

1. Navigate to <https://app.ca1.chromeriver.com/login/sso/saml?CompanyID=pasadena.edu>
2. Log in with your normal PCC credentials.

THE DASHBOARD

Home button

The home button gets you back to the main page from anywhere in the application. Click on the CHROMERIVER icon in the upper left-hand corner of the screen.

Hamburger Menu

The Hamburger Menu, the three horizontal lines in the upper left-hand corner of the screen, is where you can access your eWallet and eReceipts.

Expense and pre-approval ribbons

Click on the Draft, Returned, or Submitted Last 90 Days tiles in either the Expenses or Pre-Approval ribbons to open up a list of those reports.

The +New button

Click on the +New Button to enter a new Pre-Approval Report or Expense Report.

Your Name

Click on Your Name in the upper right-hand corner of the screen from anywhere in the application to access your settings, open up the Help Center, or log out.

Help Center

The Help Center is the first place to go for questions and tutorials. You can access it by clicking on your Name in the upper right-hand corner of the screen and then clicking on Help.

SETTINGS

You can access your settings from anywhere in the application by clicking on your Name in the upper right-hand corner of the screen.

Personal Settings

- **Primary Email:** Your main work email address.

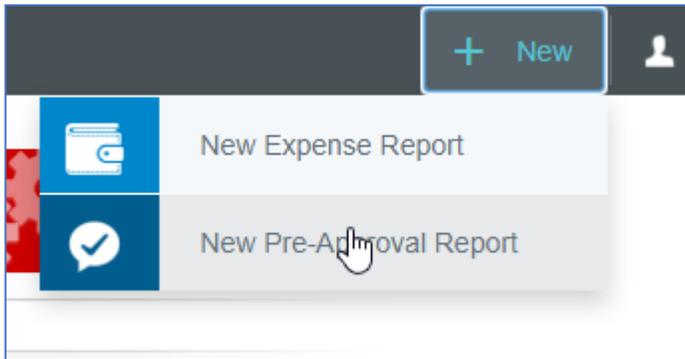
- **Alternative Email:** Allows you to forward receipts into your Chrome River account from an alternative/non-business email address.

Delegate Settings

Delegation allows you to create and submit expense reports and pre-approvals on someone else's behalf. To add delegates or approval delegates, click on your name in the upper right-hand corner of the screen and then select Account Settings>Delegate Settings. Please see the appendix for more detailed instructions.

HOW TO SUBMIT A PRE-APPROVAL REPORT

1. Click the **+New** button on the header and then click **New Pre-Approval Report**.



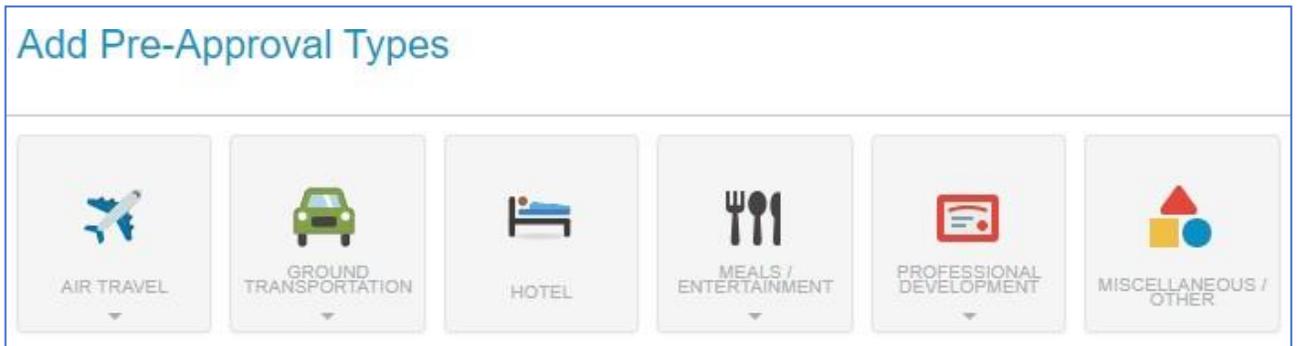
2. Fill out all of the fields on the form that are not marked as optional. This is also where you can request a cash advance or association senate funding.

 A screenshot of a form section. It contains two rows of fields. The first row has the label 'Request Cash Advance' followed by a dropdown menu with the text '-- Select --' and a downward arrow. The second row has the label 'Request Association Senate Funding' followed by a similar dropdown menu. Below the second label, the word 'Optional' is written in a smaller, lighter font.

3. Enter and select the appropriate cost center in the **Allocations** box. If you don't know the exact account string for the **Allocations** field, type the name of the fund to get a list of options.

 A screenshot of the 'Allocations' search interface. At the top, a light blue box contains the instruction: 'Please type the <CUSTOMER ALLOCATION DESCRIPTION> you would like to search for in the allocation box below. As you type, a drop down list of matching items will be displayed for selection'. Below this is a section titled 'Allocations' with a search input field containing the text 'information'. A dropdown list is visible below the input field, showing two results: 'D-100000-470000-6030 ITSR Information Tech Services' and 'D-101000-470000-6780 ITSR Information Tech Services'.

4. Save the form.
5. Select applicable tiles from the **Add Pre-Approval Types** page to enter each of your estimated expenses.



District pre-pay is available for air travel, lodging, and conference registration fees.

 The image shows a form for adding a pre-approval type. It contains three main sections:

- Estimated Amount**: A text input field containing "0.00" with a calculator icon and a dropdown menu set to "USD".
- Request District PrePay**: A dropdown menu with the text "Optional" below it and the selected value "No".
- Description**: A large text area with the text "Optional" below it.

Proof of registration and your lodging reservation are required when you request pre-payment from the District. You can upload the supporting documents to your Receipt Gallery (see below for how to do so).

6. Click the **Submit** button after you have finished adding all of your estimated expenses. The report will be routed for approval (please see the appendix for more information on the routing process).

PRE-APPROVAL REVIEW

1. Click on the **Home Button** to view the **Pre-Approval ribbon** on the dashboard. The **Pre-Approval ribbon** displays **Draft**, **Returned**, and **Submitted** pre-approval reports.
2. Click on the applicable tile to view a list of reports that fall into that category.
3. Click on the report you want to view in the list of reports. Once you select a report, you can click on either of the following buttons:
 - **Open** – Review individual line items.
 - **PDF** – Review report in PDF format with varying levels of detail.
 - **Tracking** – View who the report is currently assigned to.
 - **Recall** (if applicable) – You can move the **Pre-Approval** back to draft status if the status is not **Expired**, **Applied**, **Partially Applied** or **Approved**.

HOW TO SUBMIT RECEIPTS

A best practice is to send or forward your receipts to Chrome River as you go to avoid losing them. You can download the Chrome River SNAP application to help (please see page 12 of this document for more information about the SNAP application).

EMAILING RECEIPTS TO YOUR ACCOUNT

Use the 'Snap and Send' feature to quickly load receipt images to your account. Simply take a photo of one or more receipts and email them to receipt@ca1.chromeriver.com. The receipt(s) will then be available within your Receipt Gallery. Be sure to send the email from an email account that is registered with Chrome River. Your PCC email is already registered and you can easily add other addresses via the Preference menu.

ADDING RECEIPT IMAGES

You can attach images to an expense report while you are creating it or after it has been created. Images may be uploaded directly through the application, emailed from your device, or added via [Chrome River SNAP](#). For a complete list of receipt submission methods, see [Receipt Submission Use Cases](#).

- Only JPG, PDF, PNG, 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.
- Images attached via [Receipt Transactions](#) or [Via Scanning or Faxing](#) may not exceed a combined total of 100 MB.
- JPG and PNG files must be a minimum of 50 kB.

See [Receipt Data Extraction \(OCR\) Specifications](#) for complete details.

eWallet

The **eWallet** is where your receipts go and accumulate until they are added to a report. District credit card transactions that feed into your account will also land in the **eWallet**. You can access your eWallet via the Hamburger Menu.

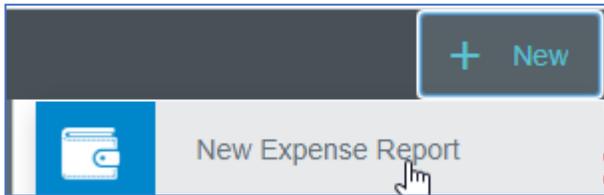
eWallet Sections:

- **Offline:** Receipts submitted via email and SNAP.
- **Credit Card:** Imported District credit card transactions.
- **Receipt Gallery:** Images uploaded directly to Chrome River from an **Offline** area.
- **Recycle Bin:** Receipt images that have been deleted.

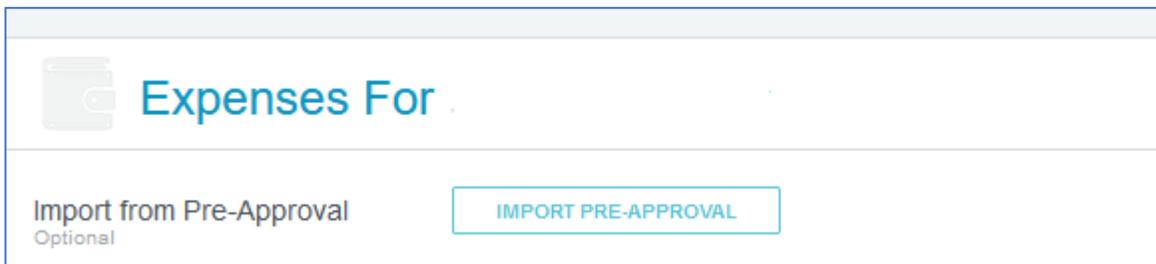
 *Chrome River attempts to match Credit Card transactions to receipts based on date, amount and expense type.*

HOW TO SUBMIT AN EXPENSE REPORT

1. Click the **+New** button on the header and then click **New Expense Report**. (Note: You can also create a new report directly from the Receipt Gallery. See [Create Expense Item Directly from the Receipt Gallery](#) for more information.)



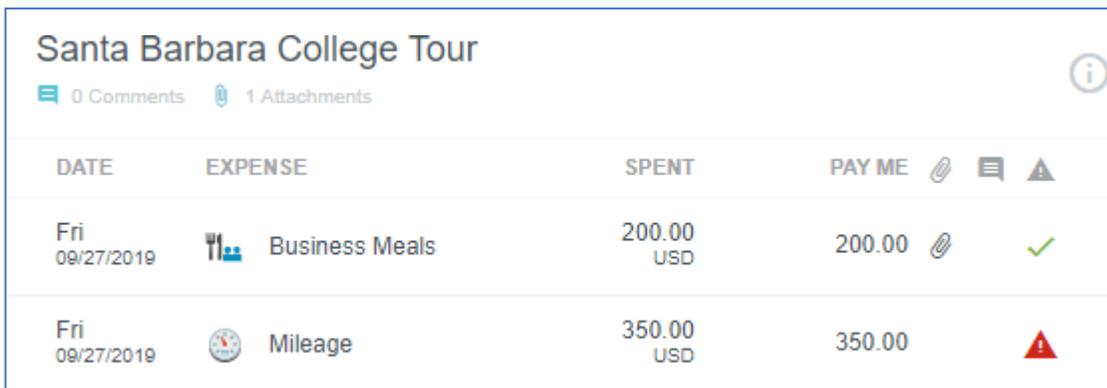
2. Click the **Import Pre-approval** button to import the pre-approval report associated with these expenses.



3. Fill out the rest of the form and click **Save**. If you are using a smaller screen, you will be returned to the report page.

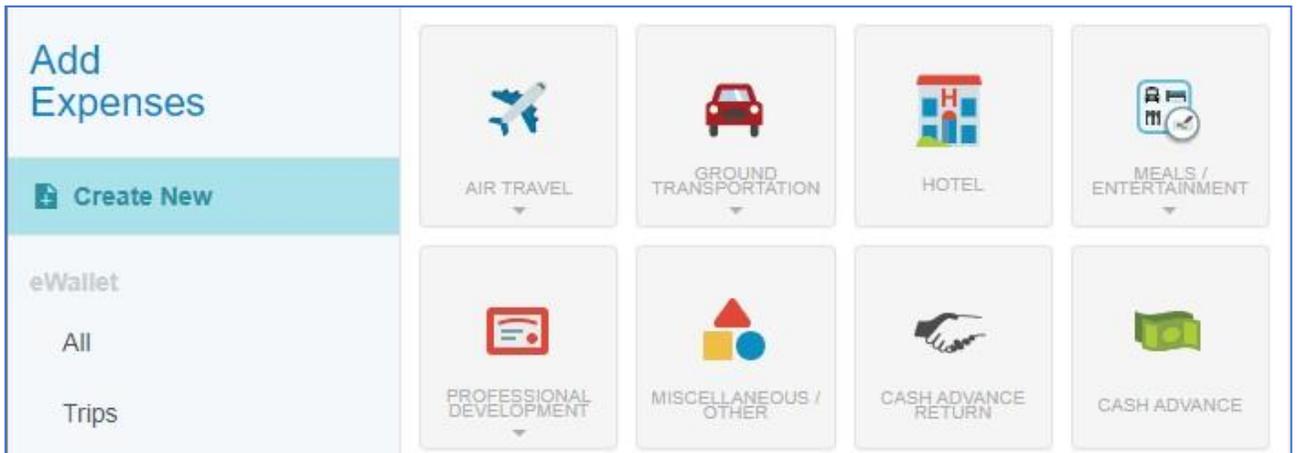
The Add Expenses screen will slide in from the right. It offers you several types of expenses, plus access to deleted items in the Recycle Bin and emailed expenses in your Receipt Gallery. A green dot next to an expense category in the E-Wallet or the Receipt Gallery indicates that there are unused items or receipts available.

4. Click on each line item to edit the expense entry and add receipts. A red triangle indicates that the entry needs to be edited. See [Expense Compliance Warnings and Violations](#) for complete information on any warnings you may encounter during the creation of a new expense report.



Santa Barbara College Tour				
0 Comments		1 Attachments		
DATE	EXPENSE	SPENT	PAY ME	
Fri 09/27/2019	Business Meals	200.00 USD	200.00	
Fri 09/27/2019	Mileage	350.00 USD	350.00	

5. Add additional line items by clicking the applicable tiles on the **Create New** tab.



Unlike District credit card expenses and pre-paid travel items that can be automatically imported into Chrome River, direct expenses are those you enter manually into your report. The tiles represent expense categories, some of which have subcategories, as indicated by the small down arrow.

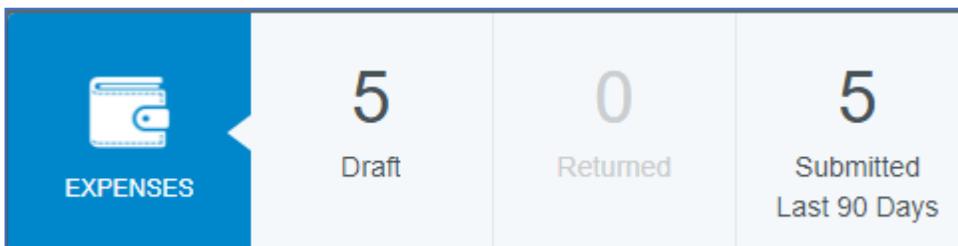
Deleting Expenses

Deleting a direct expense will remove it from the report. Any attached receipt images will be returned to the E-Wallet's Offline folder or the Receipt Gallery, depending on how they were submitted. Deleting a transaction (credit card items, travel data, etc.) will return the associated transaction item to the E-Wallet.

6. Click **SUBMIT** after you have entered all expense items and each line item has a green checkmark (if you're not ready to submit the report, click the back arrow in the upper left-hand corner to close the report and save it in Draft Expense Reports). You will be asked to confirm that your expenses are correct and for legitimate business purposes. After you click **SUBMIT** on this screen, the expense report will be routed to your supervisor for approval (please see the appendix for more information on the routing process).

EXPENSE REPORT REVIEW

1. Click on the **Home Button** to view the **Expenses ribbon** on the dashboard. The **Expenses ribbon** displays **Draft**, **Returned**, and **Submitted** expense reports.



2. Click on the applicable tile to view a list of reports that fall into that category.
3. Click on the report you want to view in the list of reports. Once you select a report, you can click on either of the following buttons:

- **Open** – Review individual line items.
- **PDF** - Review items in PDF format with varying levels of detail.
- **Tracking** - View who the report is currently assigned to.
- **Recall** - Move the report back to **Draft** Status before any line item is fully approved.

You may provide additional feedback during the approval process by entering a comment on the entire report or on individual line-items from within the expense report. On submitted expense reports, you can also see any comments entered by approvers. All comments are displayed in date order. See the comments section on the [Create Report](#) document for more information.

APPENDIX

POLICIES

When submitting reports, please keep the following points in mind:

- The most updated Board approved travel policies – especially [AP 7420 Employee Travel](#) and [BB2735 Board Member Travel](#) – describe allowable and non-allowable expenses.
- All travel documents are subject to audit by external auditors.
- Conference travel reimbursement should not be confused with Personal/Professional Growth reimbursement
- Conference travel cannot include any individual memberships for associations
- All memberships must be for institutional purposes and must be Board approved.

Timeline for submitting pre-approval reports

Pre-Approval Reports should be submitted in Chrome River:

- (1) At least five (5) business days prior to the date of departure if no advance payment is requested, or
- (2) At least fifteen (15) business days prior to the date of departure if advance payment is requested.

Your pre-approval report should include all anticipated costs including taxes and miscellaneous expenses. A copy of the detailed conference agenda or other communication from the meeting organizer detailing the dates, costs, location and meal provisions for the meeting must also be attached to the pre-approval report.

Registration: Conference Registration Confirmation Receipt Required

Registration fees charged in connection with approved attendance at conferences, conventions, committee meetings, in-service trainings, seminars, and so forth, are allowable at actual cost.

Lodging: Hotel Confirmation Receipt Required

- Lodging is not permitted if travel is less than 50 miles from the District or from the employee or Trustee's residence (whichever is the departure point of travel) unless approved in advance by the area Vice President.
- Actual lodging cost, not to exceed charges at the single occupancy rate, shall be allowed. Personal telephone calls, video rentals, or any other personal room services will not be reimbursed. An itemized receipt must be submitted with the reimbursement for the expenses to be allowable.
- Lodging will be reimbursed starting, at the earliest, the night prior to event commencement and ending on the day the event ends, unless approved in advance by the area Vice President and the budget manager (if different, i.e. Professional Development funds).

Transportation: Receipt Required

- Reimbursable transportation expenses include all necessary official travel on airplanes, railroad, buses, private vehicles, and other usual means of conveyance. Claims for reimbursement must be supported by attaching/scanning original ticket stub or receipt provided by the commercial carrier

- to the reimbursement request.
- b. Rental cars will be reimbursed at the most economical and/or appropriate rate for the number of passengers. Additional insurance should be included.
 - c. All employees and Trustees will use the most economical mode of transportation. Costs for premium/preferred seating will not be reimbursed.
 - d. Other allowable transportation related expenses are: parking fees (excluding valet parking unless self-parking is not reasonably available), highway tolls, and shuttles, rideshares, and taxi cabs.

Meals and Incidental Expenses (M & IE): Receipts Not Required

M&IE includes meals, tips and fees for food and luggage handling services. For more details, please see [AP 7420](#). M&IE allowance shall not exceed the annual IRS published per diem reimbursement rate for M&IE. See <https://www.gsa.gov/travel/plan-book/per-diem-rates>

Mileage reimbursement: IRS Standard Mileage Rates

Mileage will be reimbursed at the IRS standard mileage rates. See <https://www.irs.gov/tax-professionals/standard-mileage-rates>. The policy reimburses mileage driven by travelers that is over and above the traveler's normal daily commute to work.

Advance Payments

Advance payments for travel expenses are authorized for Trustees and employees on official business of the District under the following conditions:

- a. Prepayment is allowed for travel, lodging and registration fees to be paid directly to vendor.
- b. Individuals requesting prepayments shall complete a pre-approval report for prepaid expenses not less than fifteen (15) business days prior to the need of prepayment.
- c. A District credit card may be used for prepayments if paid directly to the vendor. An expense report must be completed against the travel authorization for District credit card payments.
- d. If a prepayment is made for travel, lodging and/or registration fees and the prepayment results in an overpayment, or the attendee cancels his or her attendance, District Fiscal Services must be notified that a refund is to be issued.
- e. In lieu of prepaid travel expenses, an employee or Trustee may request a cash advance of registration, hotel and transportation by completing a pre-approval report. This request must be complete no less than fifteen (15) business days before the travel occurs. Unused cash must be returned to Fiscal Services within five (5) business days from the last day of travel. All receipts and supporting documents must be attached to the expense report or funds will be owed back to the District.
- f. It is the supervisor's ***and/or budget manager's*** responsibility to review and ensure accurate and timely reconciliation of the employee's cash advance and the associated expense report.
- g. If expenditures are not properly substantiated or any unspent monies are not returned within the five (5) business days limit, the employee's supervisor and/or budget manager (if different) may choose to deny all or any portion of the expenses submitted and request that the cash advance be

paid back to the District. In these cases, the individual may establish a payment plan under which the amount owed is paid back to the District. If for any reason a payment cannot be established (e.g. terminated employee), the District is obligated under IRS regulations to consider such amounts as income to the individual. The associated payroll tax withholding and income reporting cannot be reversed even when documents are later submitted.

- h. No additional cash advance will be issued until a delinquent cash advance and the associated expense report is resolved, through steps outlined in item g. above.

ROUTING PROCESS

The routing process refers to whom your reports go to for approval after you submit them. Furthermore, the process is different for expense reports and pre-approval reports. While an expense report only has to be approved by your supervisor, pre-approval reports have more layers of approval that differ depending on the amount being requested and what type of travel is involved. Please see below for more information.

Pre-approval reports that total less than \$2500 and do not involve overnight or overseas travel:

Supervisor • The fund's cost center manager

Pre-approval reports for overnight travel:

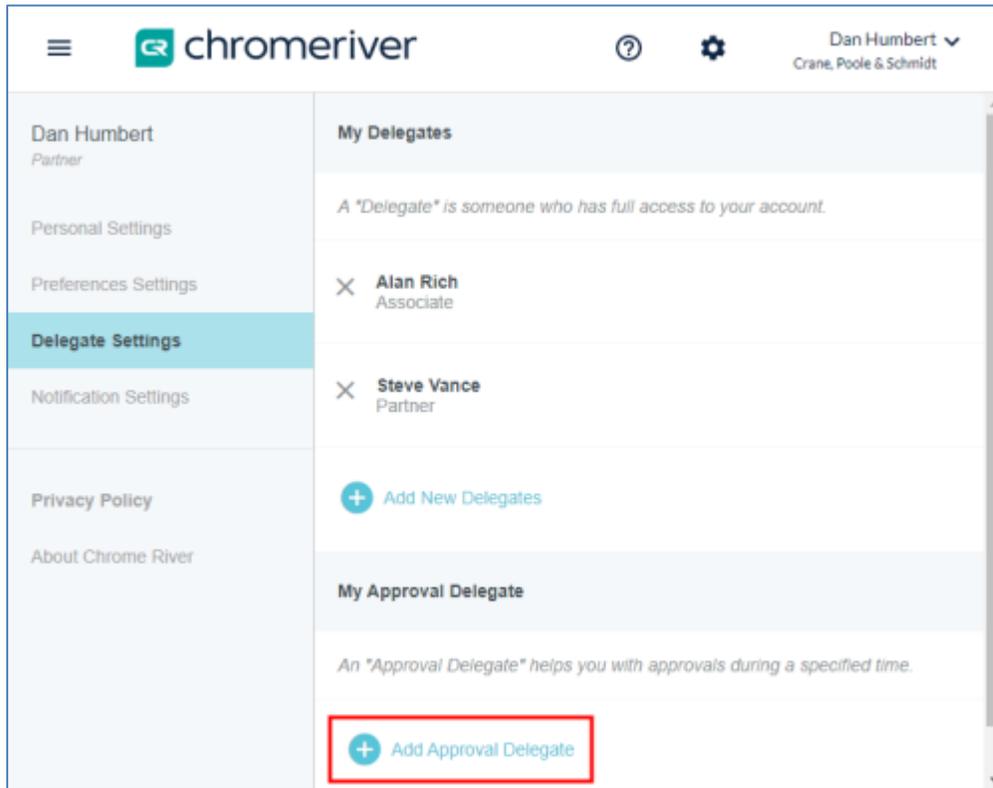
Supervisor • The fund's cost center manager • Area vice president

Pre-approval reports that total \$2500 or greater and those that involve travel outside the United States:

Supervisor • The fund's cost center manager • Area vice president • Board

APPROVAL DELEGATION – TEMPORARY ROUTING

If you need to have another user temporarily approve expenses on your behalf—e.g., while you are on vacation—click your name in the upper right corner, then click **ACCOUNT SETTINGS**. In Delegate Settings, under My Approval Delegate, click **+ADD APPROVAL DELEGATE**.



You will be able to choose the approval delegate from a searchable list and set the Start and End dates for the authorization to approve expenses on your behalf. Although the list contains everyone, PCC's rules may trigger an error message if you select someone who is not authorized to be your delegate.

My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

Select a User

Start Date 

End Date 

The delegate's name will appear with the range of dates during which they may approve expenses on your behalf.

My Approval Delegate

An "Approval Delegate" helps you with approvals during a specified time.

Steve Vance(10/12/2022-10/14/2022) 
Partner

Chrome River will send an email to the approval delegate describing the routing changes that will occur during this period. All expenses, pre-approvals and/or invoices assigned to you will automatically queue up for the delegate to approve. Regular approval emails will also be sent to the delegate.

MOBILE APPS

Chrome River SNAP Apps for Android and iPhone

Chrome River's free SNAP app enables EXPENSE users to quickly and easily capture and upload receipt images right when the expense occurs. Users simply snap a photo of the receipt using the app and it will be uploaded directly to their Receipt Gallery and the Offline tab of the eWallet for use the next time they access Chrome River. SNAP may also be used to upload images taken with another app on the device.

Add SNAP for Android link

Add SNAP for iPhone link

REMINDER: Mobile device access

Chrome River is a web application which means there is no need to download an app from the app store to your smart phone or tablet. Simply use your mobile browser to [log into Chrome River](#) as you do on your desktop. Use the "Add to Home Screen" option to add the Chrome River icon to your mobile device for easy access.

TRAINING RESOURCES

Visit the [Chrome River Training Camp](#) to sign up for webinars and view previously recorded training sessions.

RECOMMENDED TRAINING VIDEOS, WEBINARS, AND DOCUMENTATION

Chrome River Quick-Start Video

[Get up and running with Chrome River](#) in just a few minutes as you learn how to navigate, how to start a new report, and where to find your expenses, receipts and transactions

Creating & Submitting Expense Reports Webinar

[This webinar](#) covers how to login, set up preferences, capture receipts, and create and submit expense reports in Chrome River. We recommend this training for all users.

Create Report Video

The [Create Report Video](#) also describes in detail how to create an expense report.

Create Pre-Approval Video

The [Create Pre-Approval Video](#) describes in detail how to create a pre-approval report.

Approving Expense Reports Webinar

Approvers and Administrators should attend [this webinar](#).

Approval Documentation

The [approval in-app video](#) and the [approval via email](#) and [approve pre-approval](#) documents are helpful for approvers and administrators.