Adjusting, Approving, & Returning Travel Reports

**Purpose:** To provide our Chrome River approvers with instructions on how to adjust, approve, and/or return pre-approval and expense reports.

**Disclaimer:** The images used in this example are clips from the Chrome River QA (testing) environment.

Additional resources are located on the [SSC T&E Public Site](#).

Assistance is available by the SSC Help Center at **540-591-4000, 877-340-5577**, or help@ssc.vccs.edu.
General Information:

- **What does your approval mean?** When you approve a travel related request you are certifying that you have reviewed and confirmed the following:
  - Expenses incurred are for official college business and are reasonable and necessary to support the mission of the college.
  - Information contained within the report is correct and accurate, including all supporting documentation.
  - Expenses are allocated to the proper department code.
  - Expenses meets all grant and/or sponsored program guidelines, when applicable.

- **Approvers will receive Chrome River email notifications at the time of their required review and action.**
  - Approvers should take action on reports in a timely manner, within five business days of receipt.
  - Email notifications will be sent on a daily basis until action has been taken.

- **In order to adjust, approve, or return a report, the Approver must be logged in to the Chrome River application.**

- **Adjusting report capabilities are very limited. The following information/fields can be adjusted by any Approver:**
  - Pre-Approval Reports:
    - Add attachments
  - Expense Reports (by line item):
    - Add attachments
    - Approved Amount field (except mileage, public transit/taxi/shuttle, & business meals expenses)
    - Department code field (change, split allocation)
    - Business Purpose field, when applicable

- **If a report has routed to you in error, please contact the SSC Help Center and provide the following information:**
  - Expense owner’s name,
  - Report ID,
  - and, if known, whom the report should be routed to for review and action

- **Approval routing workflow varies for all users.**
  - Pre-approval and expense report approval routing differs per college requirements
  - Approval routing workflows are circumstantial, meaning different expense types, expense amounts, travel locations, etc. may require different approval routing.
Approver Email Notifications:
From the email notification, approvers can only see a high-level summary of the expenses, including compliance warnings, when applicable.

Approvers will need to log into the Chrome River application in order to fully review and take action on the report. It is imperative to carefully review the report in its entirety prior to adjusting, approving, or returning reports.

When an approver receives an email approval notification, the email body will look similar to the image below:

![Email Approval Notification](image)

**Effective January 9, 2018, approvals by email are no longer available.**
Please log in to Chrome River to review this pre-approval and Accept or Return the request.

At the bottom on the email notification, click the Chrome River link to access the Chrome River application in order to take action on a report.
Approval Queue:
If you have reports pending your approval, you will see an orange Approvals ribbon on the left panel of your Chrome River home (welcome) screen, as shown below.

- Note: The Approvals ribbon will only be visible when reports are pending your action.

From here, you will need to select which report type that you ready to review and take action, Expense Reports or Pre-Approvals. Upon selection, you will be directed to either your Expense Report Approval queue or Pre-Approval Report Approval queue.

You may also view your approval requests from the left menu.

Click on the blue three-line icon at the top left of your screen, and then select the report type that you wish to review and take action. Upon selection, you will be directed to either your Expense Report Approval queue or Pre-Approval Report Approval queue.
Once you select the report type that you wish to review, you will need to select the report that requires your action from within the approval queue.

Click on the report name once (report will be highlighted light blue when selected), as shown below.

By clicking the report name once, the preview page will populate on the right panel of your screen.

- Note: The preview page displays the high-level summary of expenses, including compliance warnings, when applicable.

![Screen shot of report preview](image)
Approving or Returning from the Report Preview Page:
Approvers have the ability to approve (or return) a report from the preview page. The SSC T&E Team highly encourages approvers to open the report and fully review the report and attachments before taking action.

To approve a report from the preview page, simply click “Approve” on the top right corner of the report screen.

After clicking “Approve” once, you will be required to click “Approve” a second time as a confirmation. By doing so, there is a lower risk of approving reports by accident or by mistake. This is especially helpful for those approvers with a multitude of reports in their approval queues.
To return a report from the preview page, simply click “Return” on the top right corner of the report screen.

After clicking “Return” once, you will be required to provide return comments to the expense owner. When returning a report, please ensure to provide the expense owner with an explanation of why the report is being returned and the required corrective action. See example below.

After entering your return comments, please click “Return” again.
Approving or Returning from the Opened Report:
Approvers have the ability to fully review and take action from within the opened report.

To approve a report, simply click “Submit” on the bottom left half of the report screen, under the list of expense line items.

After clicking “Submit” once, you will be required to click “Submit” a second time as a confirmation.
To *return* a report, simply click “Return” at the bottom left corner on the left half of the report screen.

After clicking “Return” once, you will be required to provide return comments to the expense owner. When returning a report, please ensure to provide the expense owner with an explanation of why the report is being returned and the required corrective action. See example below.

After entering your return comments, please click “Return” again.
Returning Individual Line Items (Split Approvals):
Approvers have the ability to return individual line items rather than returning the entire report. This type of action is considered a Split Approval. The SSC T&E Team discourages approvers from split approving reports.

- By split approving reports, the projected approvers will not see line items a previous approver has returned, which prevent the projected approvers from seeing the “whole travel picture”. This could cause unnecessary returns by the projected approvers and/or cause reports to sit in the projected approver’s approval queue for an unnecessary amount of time before action is taken.

To return an individual line item, select the line item you wish to return. Simply click the line item once (the line item will be highlighted blue when selected).

Next, on the right panel of the screen click “Return”.

![Screenshot of ChromeRiver interface showing a test expense report with highlighted line item and option to return or adjust]
After clicking “Return” once, you will be required to provide return comments to the expense owner. When returning an expense report, please ensure to provide the expense owner with an explanation of why the report is being returned and the required corrective action. See example below.

After entering your return comments, please click “Save”.

After you “return” and save the applicable line items, you will need to click “Submit” on the bottom left half of the report screen, under the list of expense line items.
After clicking “Submit” once, you will be required to click “Submit” a second time as a confirmation.

At this point, all “Returned” individual line items will be sent back to the expense owner, and all line items that were not “Returned” will be forwarded to the projected approver for review and action.
Adjusting Reports:
Approvers have the ability to adjust reports. However, adjustment capabilities are very limited. Approvers can adjust the following:

- **Pre-Approval Reports**
  - Add attachments

- **Expense Reports (by line item)**
  - Add attachments
  - Approved Amount field, except for the Mileage, Public Transit/Taxi/Shuttle, and Business Meals expenses
  - Department code field (change or split allocation)
  - Business Purpose field, when applicable

To adjust an individual line item, select the line item you wish to adjust. Simply click the line item once (the line item will be highlighted blue when selected).

Next, on the top right of the screen, click “Adjust”.

![Image of Chrome River expense report interface showing line item selection and adjustment button]
After clicking “Adjust”, you will be required to provide adjust comments to the expense owner. When adjusting an expense report, please ensure to provide the expense owner with an explanation of why the report is being adjusted. See example below.

After entering your adjust comments, please click “Save”.

After you “adjust” and save the applicable line items, continue to review the report and either Return or Approve the report.