

# 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](mailto: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.
  - Expenses comply with CAPP Manual, VCCS Travel Policies, and Individual College Travel Policies.
  - 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:

ACTION REQUIRED		Chrome River
Pre-Approval Request For	Sarah Everett	
Report Name	Test - International less than 100 percent	
Pre-Approval ID	QA00-0032-5060	
Submit Date	12/05/2017	
Expense Dates	12/25/2017 - 12/29/2017	
Total Expenses Approved	1,800.00 USD	
Prior Approver	Richard Friesen	
<b>Business Purpose</b>		
Test - International less than 100 percent		
<b>Account Summary</b>		Amount (USD)
110004-00	100% DANVILLE	COORD/OFF-CMPS INSTR
Danville Admin.		1,800.00
<b>Expense Summary</b>		Amount (USD)
Lodging Tax/Fees		200.00
RoomRate	1,600.00	Test - International less than 100 percent
Pre-Approval ID: QA00-0032-5060		
<b>**Effective January 9, 2018, approvals by email are no longer available.**</b>		
<b>Please log in to <a href="#">Chrome River</a> to review this pre-approval and Accept or Return the request.</b>		

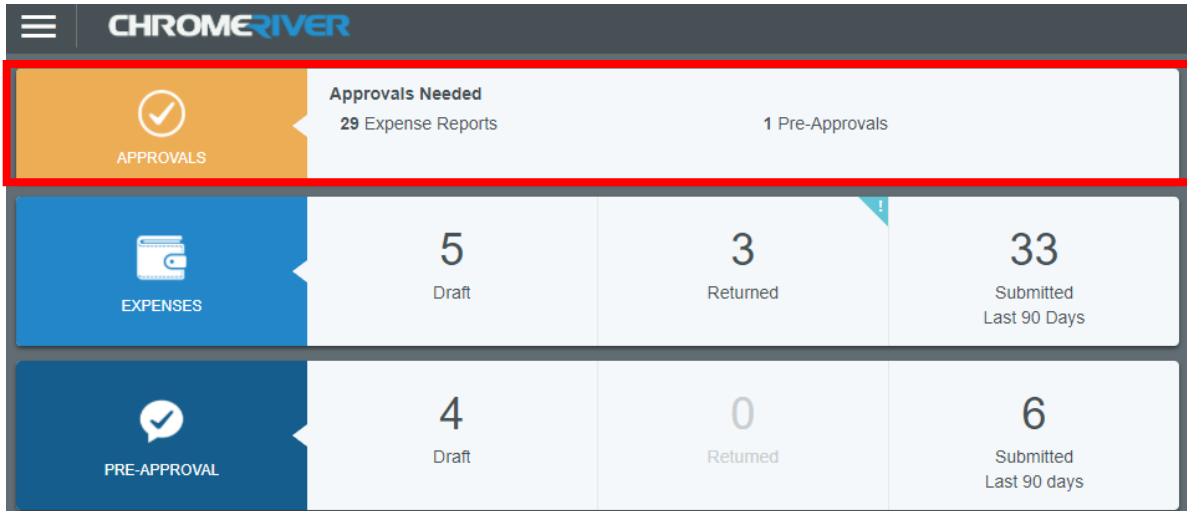
At the bottom on the email notification, click the **Chrome River** link to access the Chrome River application in order to take action on a report.

## 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.

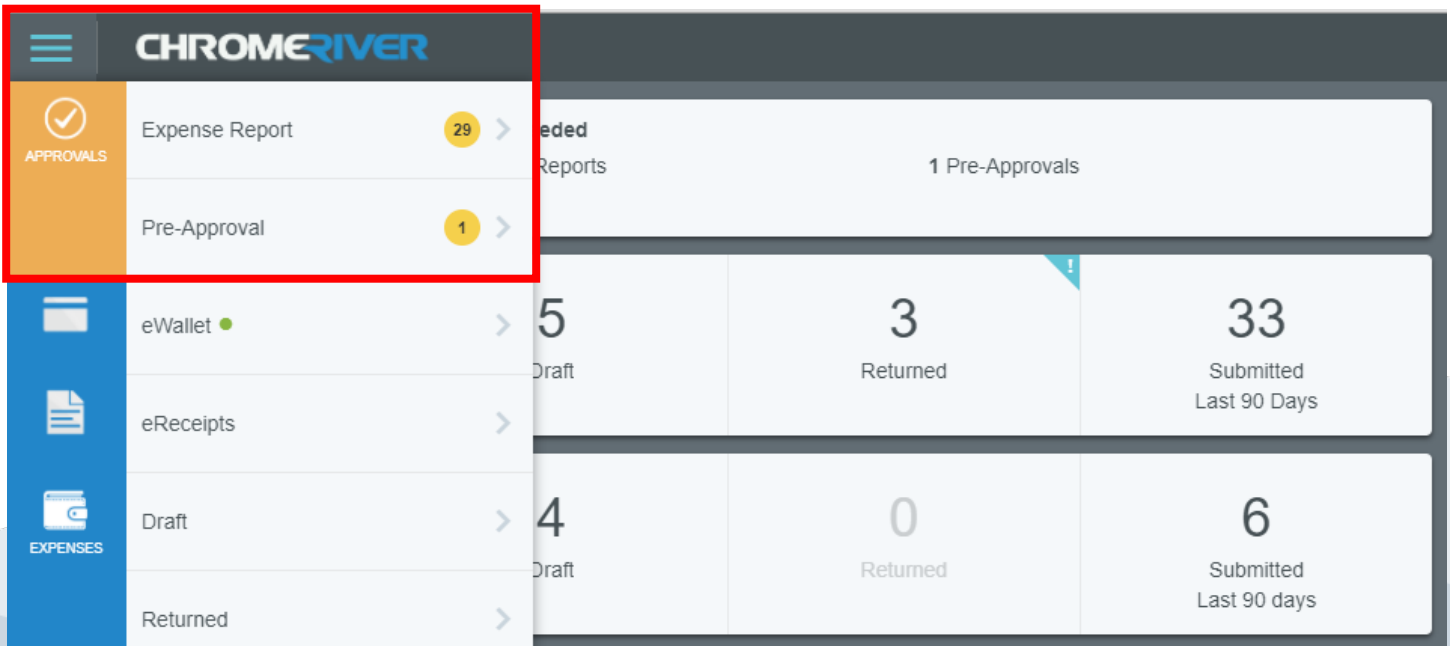
From here, you will need to select which report type that you ready to review and take action, Expense Reports or Pre-Approvals. Upon selection, you will be directed to either your Expense Report Approval queue or Pre-Approval Report Approval queue.



Category	Draft	Returned	Submitted (Last 90 Days)
EXPENSES	5	3	33
PRE-APPROVAL	4	0	6

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.



Category	Draft	Returned	Submitted (Last 90 Days)
EXPENSES	5	3	33
PRE-APPROVAL	4	0	6

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.

Approvals Needed			
Expense Reports	Pre-Approvals		
<b>Spence, Courtney</b> Courtney's Test Expense Report - New River	10/24/2017	648.28 USD	✓
<b>Everett, Sarah</b> DC279 Routing VA Over 500	10/09/2017	581.00 USD	⚠
<b>Everett, Sarah</b> DC279 Routing OOS Under 500	10/09/2017	130.50 USD	✓
<b>Everett, Sarah</b> DC279 Routing International Under 500	10/09/2017	250.00 USD	✓

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

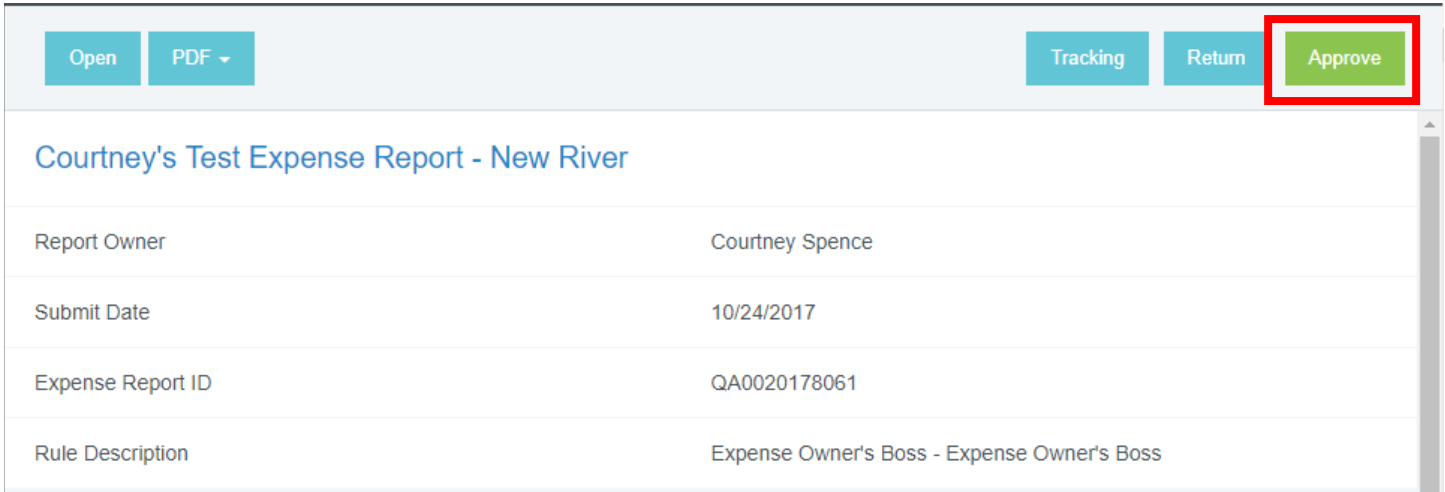
- Note: The preview page displays the high-level summary of expenses, including compliance warnings, when applicable.

Courtney's Test Expense Report - New River		
Report Owner	Courtney Spence	
Submit Date	10/24/2017	
Expense Report ID	QA0020178061	
Rule Description	Expense Owner's Boss - Expense Owner's Boss	
<b>Financial Summary</b>		
	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	648.28	648.28
Less Cardholder Responsibility	0.00	0.00
Less Company Paid Expenses	0.00	0.00
Less Company Paid Personal Expenses	0.00	0.00
Less Personal Expenses	0.00	0.00
Amount Due Employee	648.28	648.28
<b>Total Expenses For Approval</b>	<b>648.28</b>	<b>648.28</b>
<b>Applied Pre-Approval Report</b>		
DATE	REPORT NAME	AMT (USD)
09/26/2017	HL In state over 500	648.28
<b>Remaining Balance</b>		<b>659.67</b>

## 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.

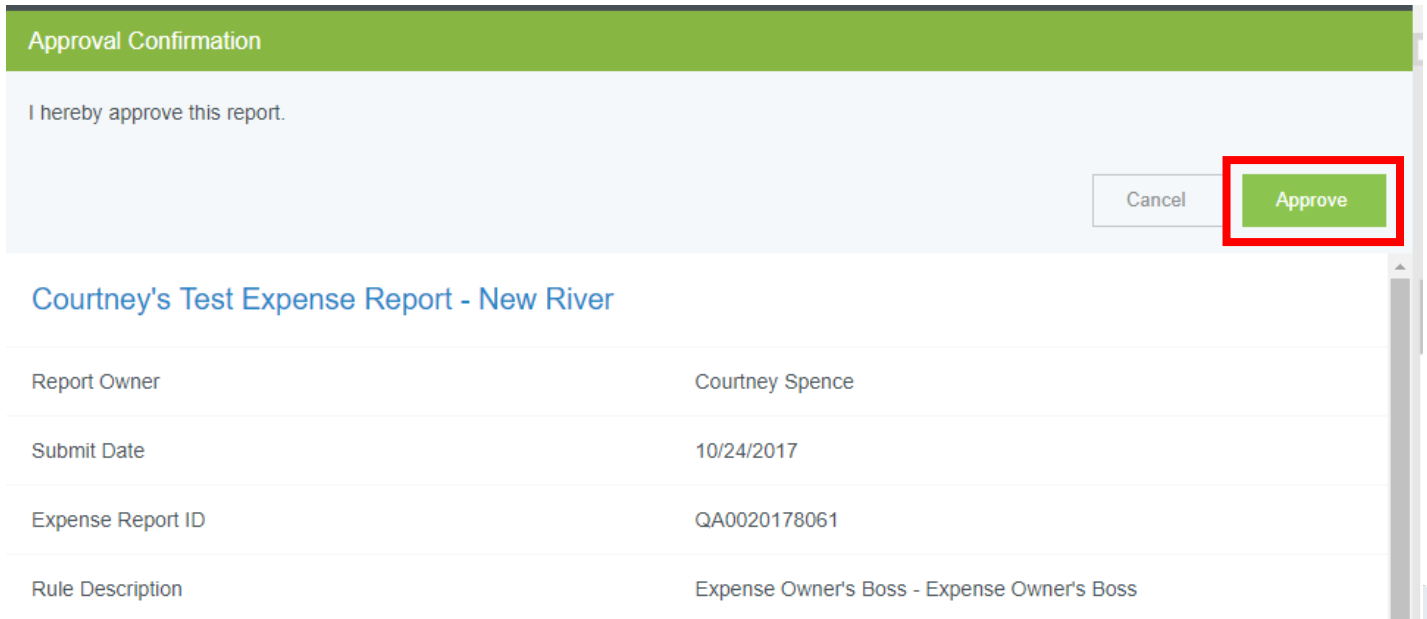
To approve a report from the preview page, simply click “Approve” on the top right corner of the report screen.



The screenshot shows the top navigation bar with buttons for 'Open', 'PDF', 'Tracking', 'Return', and 'Approve'. The 'Approve' button is highlighted with a red box. Below the navigation bar is the report title 'Courtney's Test Expense Report - New River' and a table of report details.

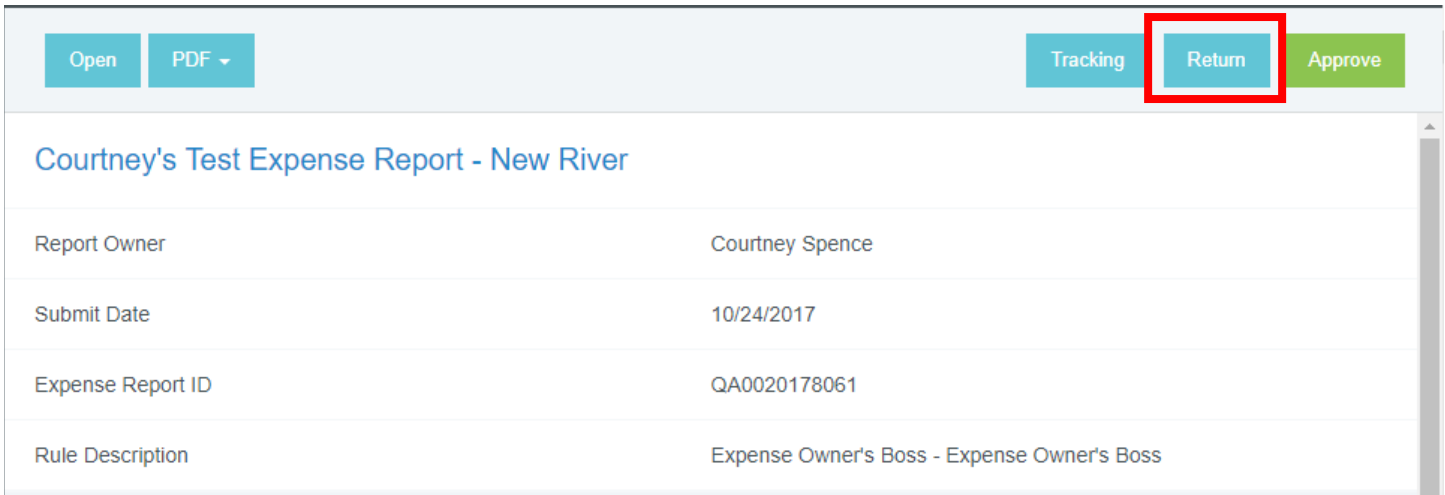
Field	Value
Report Owner	Courtney Spence
Submit Date	10/24/2017
Expense Report ID	QA0020178061
Rule Description	Expense Owner's Boss - Expense Owner's Boss

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.



The screenshot shows an 'Approval Confirmation' dialog box with a green header. The text inside reads 'I hereby approve this report.' At the bottom right, there are two buttons: 'Cancel' and 'Approve'. The 'Approve' button is highlighted with a red box. Below the dialog box is the same report preview page as shown in the first screenshot.

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



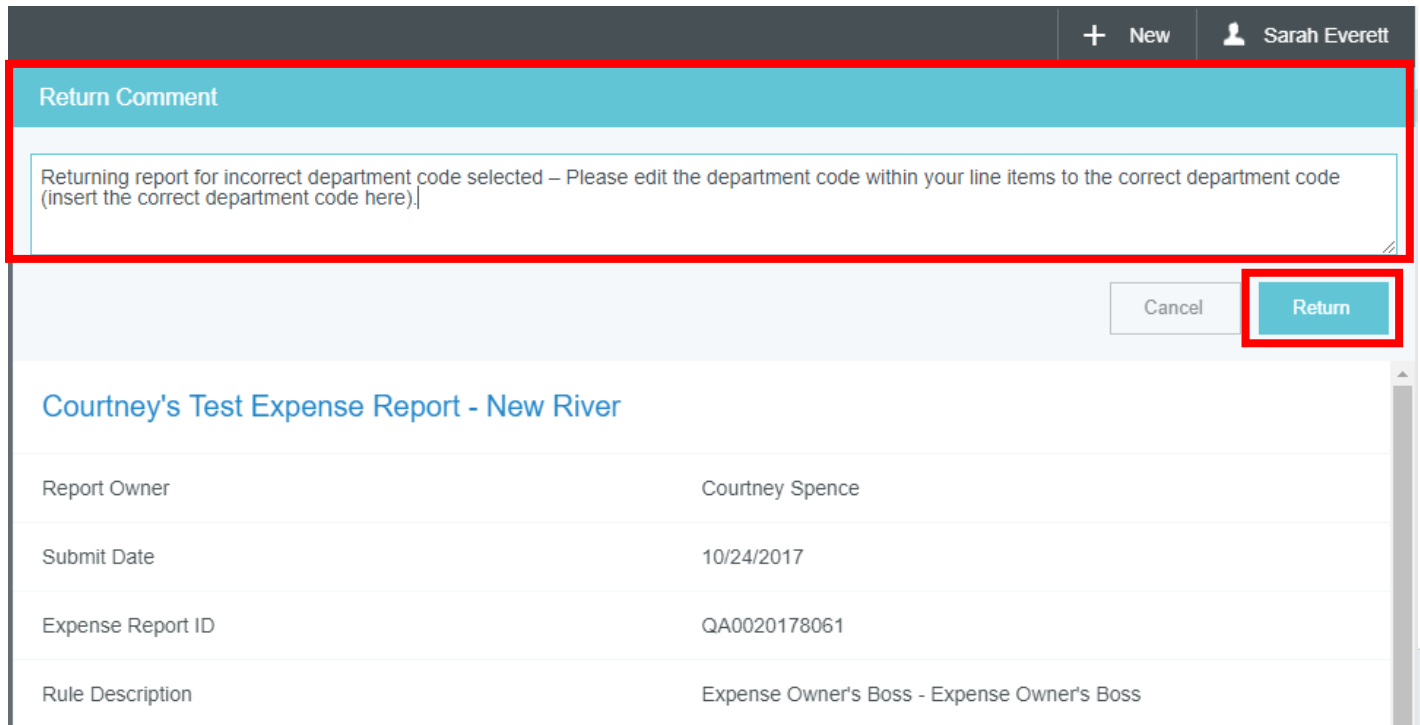
The screenshot shows the top navigation bar with buttons for 'Open', 'PDF', 'Tracking', 'Return', and 'Approve'. The 'Return' button is highlighted with a red box. Below the navigation bar is the report title 'Courtney's Test Expense Report - New River' and a table with the following data:

Report Owner	Courtney Spence
Submit Date	10/24/2017
Expense Report ID	QA0020178061
Rule Description	Expense Owner's Boss - Expense Owner's Boss

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.



The screenshot shows a modal form for entering return comments. The form has a title bar 'Return Comment' and a text area containing the following text: 'Returning report for incorrect department code selected – Please edit the department code within your line items to the correct department code (insert the correct department code here)'. Below the text area are 'Cancel' and 'Return' buttons, with the 'Return' button highlighted by a red box. Below the modal is the same report preview as in the first screenshot.

## 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.

The screenshot shows the Chrome River interface for an expense report titled "Courtney's Test Expense Report - New River". The report is owned by Courtney Spence and has 0 comments and 4 attachments. The expense items are listed in a table with columns for DATE, EXPENSES, SPENT, and APPROVED. The total approved amount is 648.28 USD. A red box highlights the "Submit" button at the bottom right of the report.

DATE	EXPENSES	SPENT	APPROVED
Mon 10/16/2017	Airfare	229.16 USD	229.16 USD ✓
Mon 10/16/2017	Hotel	145.87 USD	145.87 USD ✓
Mon 10/16/2017	Lodging	127.18 USD	127.18 USD ✓
Mon 10/16/2017	Lodging Tax/Fees	18.69 USD	18.69 USD ✓
Mon 10/16/2017	Meals Per Diem	39.00 USD	39.00 USD ✓
Mon 10/16/2017	Registration Fees	195.00 USD	195.00 USD ✓
Mon 10/16/2017	Taxi/Shuttle	12.25 USD	12.25 USD ✓
Tue 10/17/2017	Meals Per Diem	27.00 USD	27.00 USD ✓

Return Total Approved Amount **648.28** USD Submit

After clicking “Submit” once, you will be required to click “Submit” a second time as a confirmation.

The screenshot shows the "Submit Confirmation" dialog box in the Chrome River interface. The dialog box contains the text "I hereby submit this report." and two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red box. Below the dialog box, the details of the expense report are visible, including the report owner, submit date, expense report ID, and rule description.

Submit Confirmation

I hereby submit this report.

Cancel Submit

Courtney's Test Expense Report - New River

Report Owner	Courtney Spence
Submit Date	10/24/2017
Expense Report ID	QA0020178061
Rule Description	Expense Owner's Boss - Expense Owner's Boss



To *return* a report, simply click “Return” at the bottom left corner on the left half of the report screen.

Expenses For Courtney Spence

Courtney's Test Expense Report - New River

DATE	EXPENSES	SPENT	APPROVED
Mon 10/16/2017	Airfare	229.16 USD	229.16 USD ✓
Mon 10/16/2017	Hotel	145.87 USD	145.87 USD ✓
Mon 10/16/2017	Lodging	127.18 USD	127.18 USD ✓
Mon 10/16/2017	Lodging Tax/Fees	18.69 USD	18.69 USD ✓
Mon 10/16/2017	Meals Per Diem	39.00 USD	39.00 USD ✓
Mon 10/16/2017	Registration Fees	195.00 USD	195.00 USD ✓
Mon 10/16/2017	Taxi/Shuttle	12.25 USD	12.25 USD ✓
Tue 10/17/2017	Meals Per Diem	27.00 USD	27.00 USD ✓

Total Approved Amount: 648.28 USD

Return Submit

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.

+ New Sarah Everett

Return Comment

Returning report for incorrect GSA Location noted in the meals per diem and lodging line items. The correct location is Chesterfield County, VA rather than Richmond City, VA. Please edit the location to Chesterfield County, VA within the meals per diem and lodging line items.

Cancel Return

Courtney's Test Expense Report - New River

Report Owner	Courtney Spence
Submit Date	10/24/2017
Expense Report ID	QA0020178061
Rule Description	Expense Owner's Boss - Expense Owner's Boss

## 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).

CHROME RIVER

Expenses For Courtney Spence

Courtney's Test Expense Report - New River

0 Comments 4 Attachments

DATE	EXPENSES	SPENT	APPROVED
Mon 10/16/2017	Airfare	229.16 USD	229.16 USD ✓
Mon 10/16/2017	Hotel	145.87 USD	145.87 USD
Mon 10/16/2017	Lodging	127.18 USD	127.18 USD ✓
Mon 10/16/2017	Lodging Tax/Fees	18.69 USD	18.69 USD ✓

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

+ New Sarah Everett

Images Adjust Return

Airfare

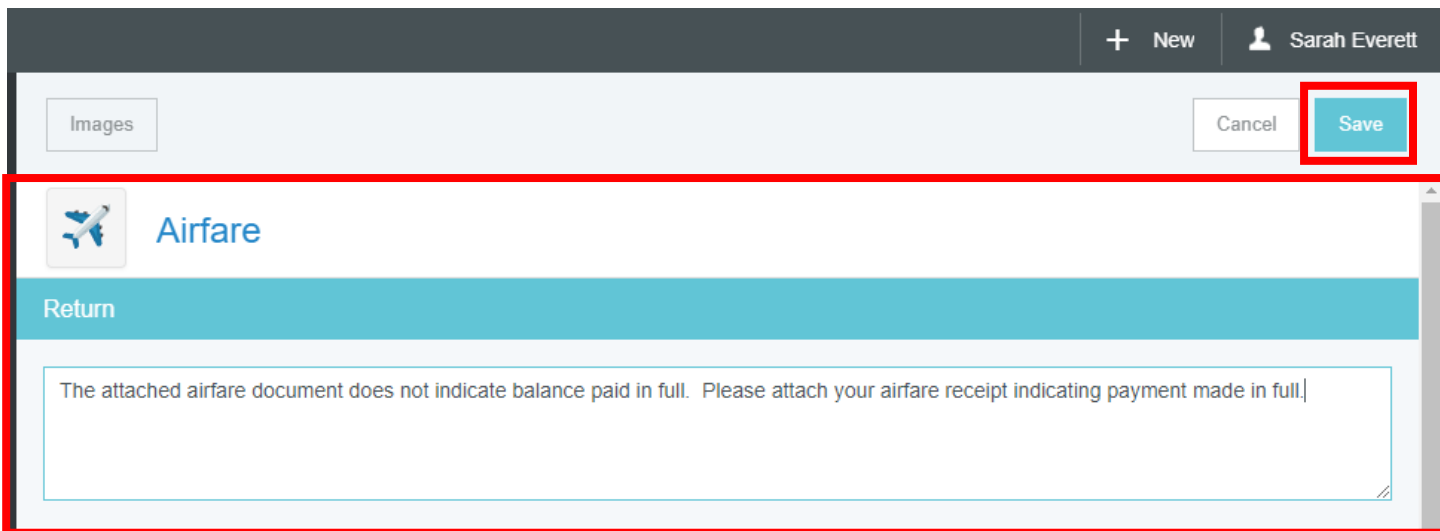
Date 10/16/2017

Spent 229.16 USD

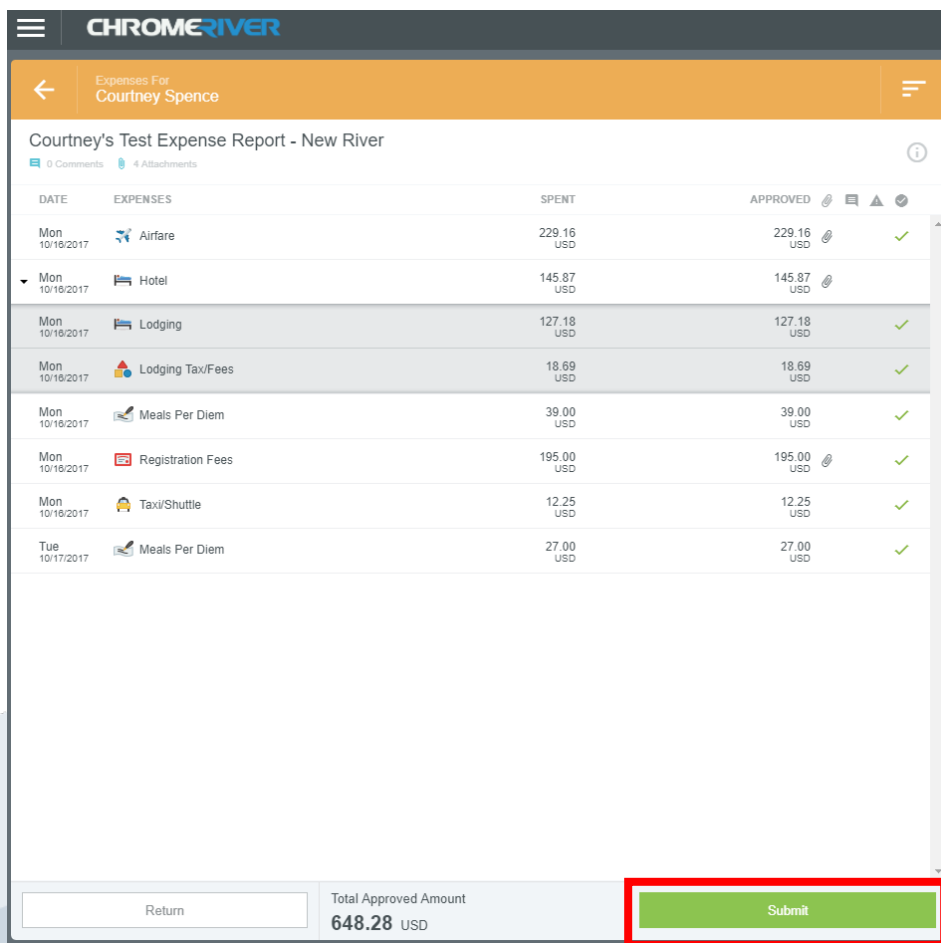
Approved 229.16 USD

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.

Courtney's Test Expense Report - New River	
Report Owner	Courtney Spence
Submit Date	10/24/2017
Expense Report ID	QA0020178061
Rule Description	Expense Owner's Boss - Expense Owner's Boss

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:

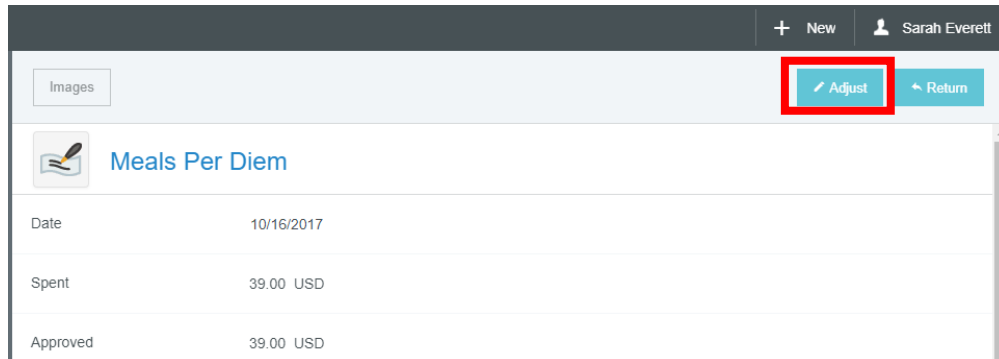
- **Pre-Approval Reports**
  - Add attachments
- **Expense Reports (by line item)**
  - Add attachments
  - Approved Amount field, except for the Mileage, Public Transit/Taxi/Shuttle, and Business Meals expenses
  - Department code field (change or split allocation)
  - Business Purpose field, when applicable

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).



DATE	EXPENSES	SPENT	APPROVED
Mon 10/16/2017	Airfare	229.16 USD	229.16 USD
Mon 10/16/2017	Hotel	145.87 USD	145.87 USD
Mon 10/16/2017	Lodging	127.18 USD	127.18 USD
Mon 10/16/2017	Lodging Tax/Fees	18.69 USD	18.69 USD
Mon 10/16/2017	Meals Per Diem	39.00 USD	39.00 USD
Mon 10/16/2017	Registration Fees	195.00 USD	195.00 USD

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

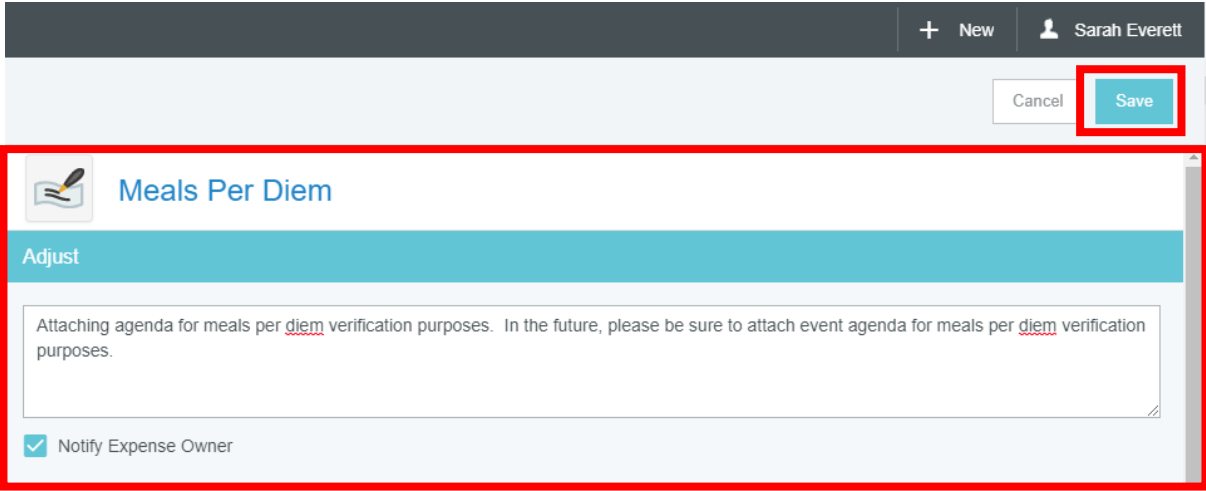


Meals Per Diem

Date	10/16/2017
Spent	39.00 USD
Approved	39.00 USD

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.