Reimbursing Travel Expenses

After your trip, you may need to request reimbursement for out-of-pocket travel expenses such as per diem, mileage, parking, tolls, or other necessary incidentals. Travel reimbursements are reviewed by your regular travel document approver (often a Fiscal Officer or their delegate), as well as Travel Management Services (TMS), in certain cases.

Per **TSOP 9.02**, reimbursement reports must be submitted within 120 days of the trip end date. Reports submitted 121-365 days after the trip end date are considered taxable income to the traveler. Reimbursement after 366 days is unallowable.

This document walks through how to request reimbursement for different travel expense types in Chrome River.

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**Allowability**

Certain expenses incurred while traveling on behalf of Indiana University may not be reimbursed. Review the IU Travel Policy for additional guidance on allowability. The following are examples of non-reimbursable travel expenses:

- Personal car maintenance or expenses
  - flat tires
  - dead batteries
  - oil changes
  - speeding tickets
  - mileage reimbursements for daily commutes to and from work.
- Room service
- Hotel tipping
- Dry cleaning
- Most foods or services at the hotel
- International phone fees
- Lodging costs for spouses/partners not traveling on IU business
Import a Pre-Approval to your Expense Report

Import the pre-approval report associated with your trip to a new expense report. This auto-populates many of the required fields on the expense report, including the specific expenses estimated on the PA.

First, initiate a new expense report. Click + New in the upper right corner, then select New Expense Report.

Click Import Pre-Approval.

On the next screen, click the drop-down menu titled Select a pre-approval report. Click on the pre-approval report you wish to import to your expense report.
Details from the PA report will populate in the right-hand window. Click Import.

All trip information from the pre-approval report import onto the new expense report automatically. These lines can be edited or deleted after they appear on the expense report.

Before you can begin reimbursements, Chrome River requires two additional fields to be completed: COVID-19 Related Cost and Business Purpose.

A COVID-19 Related Cost is any expense made necessary by the pandemic and which would not have occurred otherwise. For travel, these are primarily canceled trip costs and medical/humanitarian missions, COVID-preparedness/inspections, educators training schools on eLearning, etc. Marking Yes for the COVID-19 related cost question opens a Description field. In the Description field, explain the COVID-19 related cost.

In the Business Purpose field, explain how the trip serves IU’s mission. The Business Purpose field offers ample space to explain the reason for your trip; do not use acronyms in this field. “Representing IU at National Association of Education Procurement (NAEP) annual conference,” is an example of a valid Business Purpose.

When all required fields are filled, click Save in the upper right corner.
Editing the “Other” Expense

The Other tile on PA reports is a flexible catch-all expense tile. If you included out-of-pocket expenses as an “Other” expense on your PA, you will need to edit it and assign a more accurate expense tile on your reimbursement report.

To change the expense type, click on the Other Misc expense in the left-hand window. The expense opens in the right-hand window. Click Edit in the upper right corner.
The Other expense tile turns into a clickable drop-down menu. Select the expense tile that most accurately describes the Other expense.

In the example below, the Other expense tile is changed to mileage by clicking Ground Transportation, followed by Mileage in the submenu.

Update or complete any required information on the next page and click Save in the upper right corner. See the Reimbursing Mileage section of this document for a full walkthrough of the mileage expense.

Deleting an Imported Expense

If your report contains an imported expense that you do not need, delete it from your report. To do so, click on the expense in the left-hand window. The expense opens in the right-hand window. Click Delete in the upper right corner.
Per Diem

This section demonstrates adding and updating per diem on an expense report.

If you captured your per diem as an “Other” expense on your pre-approval, you must delete the “Other” expense and create a new expense via the Per Diem Wizard as outlined below.

Click here to learn how to delete an expense from your imported report.

Travel per diem reimbursements include the day’s lodging, meal and incidental expenses. The standard per diem rates issued by the General Services Administration (GSA) may be different based on pricing in a location or state laws. Expenses of the first day and the last day of the business travel are reimbursed at 75% of the standard per diem rate. Complimentary meals, such as a free hotel breakfast, must be deducted from your per diem claim.

In general, if lodging was booked through Egencia or another IU Designated Travel Agency (DTA), a lodging receipt is not required to claim per diem. Trips funded by grants or sponsored programs may require additional documentation. Contact the Office of Research Administration (ORA) for guidance.

Per diem claims for lodging booked without using a DTA will not be paid without the original lodging receipt unless the following exceptions apply:

- A traveler lodged in a private residence with a relative or friend
- A third party paid for all of the lodging expense

Review the Per Diem page on the Travel website for information on substantiating these exceptions.

Create an expense report by clicking +New at the top of Chrome River and import your pre-approval report.

Add an expense for per diem by clicking the white plus sign. Click the meals expense tile and select Per Diem Wizard in the drop-down menu.
The Per Diem Wizard opens on the left. Enter the dates of your trip and the location of your lodging. Enter the account number funding your trip in the Allocation field. Click Add Entries.

As highlighted in the screenshot below, travel days, or the first and last days of your trip, are automatically calculated at a lower rate.
Meals provided to the traveler during the trip, such as continental breakfasts, lunches at conferences, dinners with home hosts, etc. also reduce the amount of per diem reimbursed. In the right-hand window, click on each day and indicate which meals were complimentary, i.e., not paid out of pocket, by checking the box next to those meals.

In the example below, the traveler was provided a complimentary breakfast by the hotel each morning but paid out of pocket for lunch and dinner. Check the box next to breakfast to remove the per diem for breakfast. The “Pay Me” amount is automatically reduced as you add complimentary meals.

When you’ve deducted all complimentary meals, click Add to Report.

Per diem expenses added to the expense report appear in the left-hand window. The green checkmarks indicate the expenses are complete.
When all expenses are added and show a green checkmark, click **Submit**. Chrome River asks you to certify that all expenses are for legitimate business purposes by clicking **Submit** again.

An error appears, asking you to explain why a lodging expense/receipt is not included with the per diem. As noted at the beginning of this section, when lodging is booked through Egencia or another IU DTA, a lodging receipt is not required to claim per diem. **Substantiate this exception** in the provided field. We’ve entered “Lodging was booked via Egencia and reconciled before the trip.” This lets approvers know that the expense is allowable without a lodging receipt.

In the rare event you paid out of pocket for lodging, lodging receipts are required for claiming per diem. For help with attaching receipts, see the **General Travel Expenses section** of this document.

**Mileage**

This section demonstrates adding and updating mileage on an expense report.

If you captured your mileage as an “Other” expense on your pre-approval, you must **edit** the “Other” expense and change its expense tile to mileage.

[Click here to learn how to edit an expense on your imported report.](#)

Chrome River reflects the most up-to-date mileage rates. The reimbursement rate varies depending on the distance traveled. The first 500 miles of a trip are reimbursed at a higher rate. Miles exceeding 501 are reimbursed at a lowered rate.

Mileage is calculated automatically using the Google maps mileage calculator built into Chrome River. Visit the **Traveling by Car page on the Travel website** to learn more about using a personal car for IU business.

Create an expense report by clicking **New** at the top of Chrome River and **import your pre-approval report**.

Click the **white plus sign** and select **Ground Transportation**, followed by **Mileage** in the submenu to add the expense. If the trip contained five or more destinations, select “Accumulated Mileage” and **follow the steps on the Accumulated Mileage page**.
Scroll down until you reach the **Calculate Mileage** tool. Enter your trip into the Google maps mileage calculator by clicking **Calculate Mileage** next to the **Miles** field.

A map opens in the righthand window. Enter your starting point and your destination. To add multiple stops or locations, click on **Add Destination**. Your miles traveled are calculated automatically.

In the example below, the traveler drove from the Indiana Memorial Union on the Bloomington campus to the University of Chicago. To calculate round trip mileage, click Return to Start. Click on **Save Trip** to save your work and return to your expense report.
Expense report fields are automatically updated to reflect your trip. The Spent amount is the dollar amount you will be reimbursed for your mileage.

Ensure all other fields, such as the account funding the trip, are correct. When finished, click Save in the upper right corner.
After saving, your mileage expense appears in the left-hand window. The green check mark indicates the expense is complete.

General Travel Expenses such as Parking
Traveling often comes with incidental expenses such as parking, tolls, shuttles, and taxis that are covered out of pocket by the traveler and reimbursed after the trip. These reimbursements are subject to various requirements.

Per IU Travel Policy, an expense whose value meets or exceeds $75 must be substantiated with appropriate, itemized receipts. Your department may have additional receipt requirements.

Create an expense report by clicking +New at the top of Chrome River and import your pre-approval report. Click the white plus sign and select the expense tile that most accurately describes the expense.

In the example below, the traveler requests reimbursement for taxi fare. Click the expense tile for Ground Transportation, followed by Taxi/Shuttle in the submenu.

Enter the date, spent amount, and vendor of the taxi trip. In this example, the vendor was Lyft. Enter the account funding the reimbursement in the Allocation field.
Scroll down to the **Attachments** section of the expense. Click **Add Attachments**, followed by **Upload Attachments**.

Navigate to the receipt stored on your computer. Chrome River accepts PDF, JPG, PNG, and TIFF files as attachments. Select the **receipt** and click **Open**.

The receipt is attached. Click **Save** when all receipts are added.
If your expense is $75 or greater, a receipt is required for reimbursement. If you attempt to save the expense without adding a receipt, the following error will display.

If you do not have the receipt, provide a detailed summary of what transpired, with sufficient itemization to substantiate the expense. For example, “I accidentally threw away the receipt. I took taxi from the hotel to the conference venue on 11/17/20. The fare was $79, including $7 tip.”

This comment becomes part of the official audit record for the noncompliant reimbursement.

When all expenses are added, click Submit. Chrome River prompts you to verify that all expenses are for legitimate business purposes. If this is true, click Submit again.
Expanding a PA

Once all out of pocket and prepaid travel expenses have been reimbursed or reconciled, respectively, you may have unused pre-approval report items. Review the [Expanding a PA section of the Pre-Approval guide](#) to learn how to expire unused expense lines. Expenses automatically expire after 365 days.