Approving and Reassigning a Pre-Approval Report

All IU-sponsored travel requires Pre-Approval. This Pre-Approval is collected in Chrome River via the Chrome River Pre-Approval (PA) report. The PA report requirement supports IU’s responsibility to act in the best interest of our colleagues and ensure they are working in the safest possible conditions. It also allows Fiscal Officers and other fiscal reviewers to be fully aware of projected costs for upcoming travel plans.

Pre-Approval is required when submitting the following Chrome River expense report types:

- Employee Travel
- Student Travel
- Non-Employee/Non-Student Travel
- Recruiting Travel
- Student Group Travel

This document walks through how to review, approve, and return a PA report. It also demonstrates how to reassign the report to an assignee, such as an Executive Approver, for additional review and approval.

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Review and Approve a Report

Pending Pre-Approval reports display in the Approvals Needed ribbon alongside pending expense reports. Click Pre-Approvals to view PA reports pending review.

In the screenshot below, Juliet Roberts has 9 pending Pre-Approvals.

A list of pending Pre-Approval reports opens. Limited details are shown, including the name of the Expense Owner, the date the report was submitted, the name of the PA report, and how much the traveler plans to spend. The report ID is also shown below the report name.

To view more details, click anywhere on the row containing the PA report you want to review. The report opens in the right-hand window.

In the example below, Holly Hooper is the Expense Owner, however, her delegate, Juliet Roberts, created the report on her behalf. The submission date, expected cost, report ID, and trip dates are shown as well.
The second half of the PA report contains financial information about the trip, including the account number funding the trip.

In the example below, Holly expects to spend $300 on lodging and $50 on “Other.” The “Other” expense tile requires a written explanation and is used to document expenses such as mileage, per diem, conference/hotel fees, etc. **Always review the details of an “Other” expense.**
Expenses populate in the left-hand window. Click on **Other** to view the submitter’s description of the expense in the righthand window.

In this case, Holly expects to spend $50 on mileage. **As part of a complete fiscal review, assess all expenses and details before approving or returning the report.**

If the Pre-Approval request is allowable and is for in-state or intercampus travel, **log a comment substantiating your approval and click Approve to approve the trip.** If the trip involves domestic or international travel, reassign the report to an Executive Approver or their designee. To reassign, see the **Reassign A Report** section of this document.
### Pre-Approvals For Holly Hooper

<table>
<thead>
<tr>
<th>Expense</th>
<th>Estimated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>300.00 USD</td>
</tr>
<tr>
<td>Other</td>
<td>50.00 USD</td>
</tr>
</tbody>
</table>

- **Report Name:** Holly Hooper IUPUI Sept 15-17
- **Trip Start Date:** 09/15/2020

**Total Estimated Amount:** 350.00 USD

**Comments:**
- FO Approved

**Attachments:** Drag image here to upload | Upload Attachments
Return a Report

If the trip is unallowable or the report needs adjustment, return the report. This sends the PA back to the Expense Owner, who can adjust and resubmit the report or delete it. Click **Return** to return the report to the Expense Owner.

Chrome River prompts you to provide a comment explaining the return. Enter instructions for revising the report, or provide a reason for rejecting the trip. Click **Return** again to return the report.

A pop-up will confirm the return.
Reassign a Report

Until further notice, domestic and international university-sponsored trips require executive level approval from a Chancellor, Dean, AVP, or EVP. Ideally, the PA report is reassigned to an Executive Approver and approval action taken in Chrome River. Alternatively, written approval from an Executive Approver given in some other form, for example, via email, may be attached to the PA.

An Executive Approver may select the fiscal officer, travel document approver, or other designee to review and approve PAs on their behalf. In these situations, designees must log a comment on the PA stating that they are the Executive Approver’s designee.

Reassigning a PA will route the report to an assignee you choose for review. This will remove the PA from your Approvals Needed ribbon and add it to the assignee’s. Always complete a full fiscal review before reassigning to an Executive Approver or their designee.

To reassign, click on the Menu button, represented by three dots in the top right corner of the PA report, then click Reassign.

Two fields will open: one to select the assignee and one to provide instructions. Search for the assignee by name or university ID (UID#). Use the Person Lookup task in One.IU to locate the approver’s UID#.
Enter the individual’s username in the **Principal Name** field.

If searching by name, ensure the position title matches that of the person for whom you’re searching.
Enter a comment substantiating fiscal review and explaining the desired action. Click **Reassign**.

A pop-up will confirm the reassignment.

The report has been reassigned. It will be sent to the approver you chose.