Indiana University Office of Procurement Services

<div style="background-color:#8B0000;color:white;padding:8px;">STANDARD OPERATING PROCEDURE</div>

SOP NO:	SOP-TVL-04
SUBJECT:	Handling Chrome River Expenses for a Department Different from Your Own
SOURCE:	University Procurement Services
ORIGINAL DATE OF ISSUE:	2/22/2022
DATE OF LAST REVISION:	N/A
DISCLAIMER:	The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Travel Management Services reserves the right to determine on a case by case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover each and every situation nor can it anticipate specific circumstances.
RATIONALE:	Sometimes a department may agree to pay for travel expenses on behalf of an expense owner who belongs to another department. When this occurs, the funding department will often request access to the expense owner's Chrome River account. Please consider the following information before requesting access to the traveler's Chrome River account.
PROCEDURES:	The best practice in this scenario is to give the funding department's account number (and sub-account if used) to a Delegate (CR report submitter) who belongs to the same department as the expense owner. Their Delegate should submit the expense report(s) and allocate the expenses to the account number given. The report(s) will then route to the appropriate approver(s) for the funding accounts involved. If this is not possible, a Delegate from the funding department can become a Delegate for the expense owner. Follow the procedure below. 1. Email travel@iu.edu and request access to the expense owner's profile 2. Include the name of the expense owner and their user ID number to become their delegate. If you are a super delegate for a department already and trying to get access to a traveler outside of your department, include the travelers name and user ID, the department's chart org (e.g. UA-ESTC, BL-CHEM) that you want the traveler to be temporarily assigned to. 3. Process the expenses in Chrome River 4. Upon final approval of the expense report(s), or when access is no longer needed, email travel@iu.edu and request to be removed as the delegate, or if you are a Super Delegate, have the traveler's temporary relationship attribute be removed. Provide the Chart-Org to be removed from the expense owner's profile. **Possible implications:** Becoming a Delegate, for someone not in your department, has possible implications. If you possess the Super Delegate role in Chrome River, and requested access to a department, this access will associate the traveler with your chart-org. As a result, if you run analytics in Chrome River, you will now see all finances for all departments that you have access too when running reports, not just your primary department. If you are a super delegate and requested that a traveler is added to your department, they will now appear on your department's financial reports as well. This becomes an

	issue when taking inventory of aging transactions. The fiscal officer may find unused credit card items belonging to the external department intermingled with their own department's, which would reflect an inaccurate count of aging transactions within their responsibility area. To prevent this, email travel@iu.edu and remove your access to the external organization, or traveler, when you no longer need it. If access is still needed, your analytics can be filtered to only display the relevant financial activity.
DEFINITIONS:	**Expense owner** is person who traveled and is being reimbursed. **Delegate** is the person who is submitting the Chrome River expense report on behalf of the traveler. **Approver** is the person the Chrome River report routes to for approval. **Aging transactions** are unprocessed credit card transactions that are currently in expense owner's ewallets
CROSS REFERENCE:	