Pre-Approval FAQs

Q. I need help with my Pre-Approval. Who can I contact for assistance?

A. Email your Pre-Approval questions to USI's Chrome River Helpdesk. This box is monitored by Travel Procurement (and Accounts Payable).

Q. My Pre-Approval says "Pending". What does this mean?

A. It means your Pre-Approval is awaiting approval from one or more approvers and, therefore, is not fully processed. The approvers group includes Travel Procurement and financial managers and may also include Provost Office and/or Student Affairs.

• Tip: View the guide *Tracking a Pre-Approval*

Q. My Pre-Approval says "Approved". What does this mean?

A. It means the Pre-Approval is fully processed in Chrome River (i.e., all approvers in the queue have approved the Pre-Approval).

• Tip: View the guide *Tracking a Pre-Approval*

Q. My Pre-Approval says, "Partially Applied". What does this mean?

A. It means some of the funding on your Pre-Approval has been used. The amount shown is the balance currently available.

• Tip: View your Expense Report(s) for the trip to see details of funding used.

Q. My Pre-Approval says "Used/Expired". What does this mean?

A. It means either the funding on your Pre-Approval is fully exhausted (used) or it has been 90 days since the trip end date and it is no longer available (expired).

• Note: Pre-Approvals are set to automatically expire 90 days after the trip end date. Giving the traveler three months to reconcile trip expenses.

Q. In the Pre-Approval Ribbon, on Chrome River's homepage, there is a number in the Draft field. What does this mean?

A. It means a Pre-Approval was started, but it was never submitted for approval in Chrome River.

• Tip: View the Chrome River Pre-Approval Guides for helpful information.

Q. In the Pre-Approval Ribbon, on Chrome River's homepage, there is a red number in the Returned field. What does this mean?

A. It means that a Pre-Approval has been returned because corrections are needed on it. Click on the red number, select the Pre-Approval, and review the Comments section on the Pre-Approval to see what needs to be corrected on it. After the requested changes have been made, then resubmit the Pre-Approval.

• Tip: When a Pre-Approval is returned, the traveler receives an email from Chrome River notifying him/her of the Pre-Approvals return. View the Chrome River Pre-Approval Guides for helpful information.

Q. What do I do if a Pre-Approval has been returned?

A. Review the Comments section of the Pre-Approval for notes on why the Pre-Approval was returned.

• Tip: View the guide *Editing a Returned Pre-Approval*

Q. Can documents be added to a fully processed Pre-Approval?

A. Yes. Select the Pre-Approval in Chrome River, scroll to the bottom, click Upload Attachments.

Q. Can documents be added to the Pre-Approval during the approval process?

A. Yes. Select the Pre-Approval in Chrome River, scroll to the bottom, click Upload Attachments.

• Note: Those who have already approved the Pre-Approval will not see the new attachment.

Q. Can I begin, stop, and later come back to a Pre-Approval?

A. Yes. If you do not click on submit, then it will remain in your Draft folder.

Q. Do I list all my trip expenses on my Pre-Approval if I am only getting limited funding?

A. No. Only expenses that equal your allotted funding.

Q. What is the limit on how many document pages should be uploaded?

A. Please do not upload more than a total of 50 document pages to the Pre-Approval. Uploading an amount greater than 50 document pages may cause a submission issue for the Expense Report.

Q. When can I delete a document from a Pre-Approval?

A. An uploaded document can only be deleted from a Pre-Approval when the Pre-Approval is either in the Draft folder or in the Returned folder.

Q. How do I delete a line item from a Pre-Approval?

A. View page 5 in the guide *Creating and Submitting a Pre-Approval*.

Q. How do I delete a Pre-Approval?

A. View the guide *Deleting a Pre-Approval*.

Q. How do I edit a Pre-Approval?

A. View the guide *Editing a Pre-Approval*.

Q. How do I track a Pre-Approval?

A. View the guide *Tracking a Pre-Approval*.

Q. My registration requires a check to be sent. How is this done in Chrome River?

A. This is an Expense Report function. View page 17 in the guide *Detailed Expense Type Examples*.

Q. My trip is not receiving funding from or through (grants) the university. Do I still need to enter a Pre-Approval in Chrome River?

A. If you are not receiving funding support from or through the University for your trip, then do not create a Pre-Approval in Chrome River.

• Note: Your department may have an internal process that requires you to communicate travel plans regardless of funding support from the University.

Q. What does the Routing Rule number mean in the tracking of a Pre-Approval?

A. View the guide *Routing and Workflow for a Pre-Approval*.

Q. Will I know if a Pre-Approval is returned?

A. Yes. An email will be sent from Chrome River to notify you (and a delegate, if applicable) that the Pre-Approval has been returned.

• Tip: View the guide *Editing a Returned Pre-Approval*.