

CHROME RIVER QUICK GUIDE: CREATING AN EXPENSE REPORT – STUDENT

Note: Students do not have access to Chrome River. A faculty or staff member will need to complete any required Pre-Approvals and/or Expense Reports for the student.

1. Click the **+Create** button the Navigation Bar of the **Expenses** section.



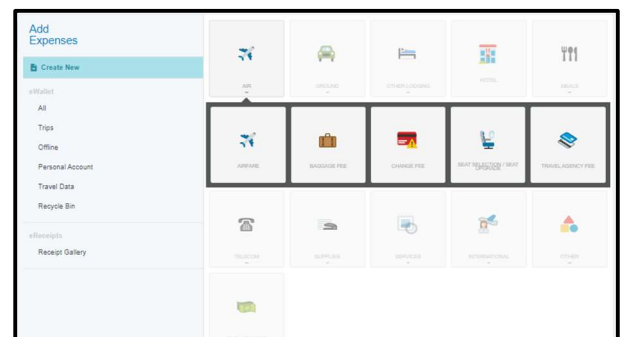
2. Complete the Expense Report Header with the following:

- **Report Name** – Provide a unique and descriptive name for the report
- **Report Type** – Select Students
This will open the Student’s dropdown box for you to select the student’s Name and 93#. All currently enrolled students are preloaded into Chrome River.
- **Purpose** – Choose from the selected list based upon the purpose of the travel
Please Note: Students only have the following options for reimbursement, as student travel reimbursement can only be approved under each situation.
 - Student Clubs and Functions
 - Attending a Conference (On behalf of the university)
 - Other (Requires very specific details)
- **Travel Type** – Select **Domestic** or **International**
- **Start and End Dates**– Select
- **Business Purpose** – Select
- **Travel to more than one location** –If traveling to multiple locations, please select ‘Yes’ and input each Country, City, State. There can be up to 3 destinations completed for each Expense Report. If more than 3 are traveled, please add additional destinations in the comment box.
- **Country, City, State** – Provide the appropriate Country, City, and State for the travel destination. Country State are drop down fields and City is a free form field.

After the report header has been fully completed, click **Save** in the upper right corner to continue.

ADD EXPENSES

3. Click on the **+** sign with the circle to open the Add New Expense Window. Selecting **Create new** in the Add Expenses window will display expense tiles to the right. Tiles with the downward facing arrow at the bottom have additional expense tiles listed under them for you to choose for the report. Select an expense to add to the report.



4. Complete the expense tile, including adding a receipt (where required) and selecting the Allocation (Index) where the expense should be charged. Click **Save** in the upper right corner to continue.

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Taxi / Limo / Shuttle

Cancel Save

Date: 01/09/2023

Amount: 30.00 USD

Business Purpose: Transportation from San Diego Airport to Hotel

From: Airport

To: Hotel

Tip Amount: 2.00

Tip Percent: 7.14

Agency Card:

Allocation: W121310 STATE Travel Office

- The expense will be added to your expense report and will be visible on the report summary to the left. The Add Expense window will appear again on the right side of the screen.

Expense Report Summary

Expense Report: QAO2056477418

Total Pay Me Amount: 500.00 USD

Submit

- Continue adding expenses to your report by selecting the appropriate expense tile, completing the expense tile form, and clicking **Save** at the top right.
- Once you have finished adding all expenses to your expense report, click on the green **Submit** button at the bottom of the report summary.

Expense Report Summary

Expense Report: QAO2056477418

Total Pay Me Amount: 500.00 USD

Submit

A submit confirmation will appear at the top right of the screen. Click **Cancel** to return to the report and make any changes. Click **Pre-Approval** to attach a previously submitted Pre-Approval report to your expense report. Click **Submit** to submit the report to the approval flow.

Submit Confirmation

I hereby certify that the expenses listed represent a true statement of actual travel expenses incurred in accordance with all applicable William & Mary Policy and Procedures. All expenses listed are for legitimate business purposes and in support of the WM mission and goals.

PDF - Cancel Pre-Approval Submit

Note:

- Attach the Student's approval email for expenses. Email the PDF of the Expense Report to the Student for approval. They can "electronically sign" in a reply email. **For example: "I hereby certify that all expenses listed here are true and correct to the best of my knowledge and \$xxx is the correct amount"**.
- Students can be reimbursed for travel expenses in Chrome River ONLY if they are traveling on official university business. Otherwise, expenses must be reimbursed under the Student Payment Process (Awards, Stipends, Fellowships, Prizes, and scholarships). Those are reimbursed either in buyW&M or by Financial Aid.