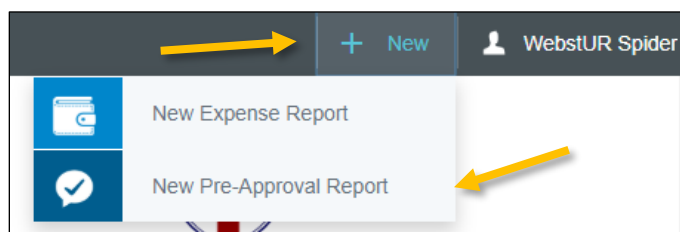1. Click the **+ New** button on the Navigation Bar and select **New Pre-Approval** report from the dropdown menu.

2. Complete the pre-approval report header with the following:

- **Report Name –** Provide a descriptive, unique report name
- **Start Date –** Click the calendar icon to select the date of departure for travel or transaction date for non-travel
- **End Date –** Click the calendar icon to select the date of return for travel or transaction date for non-travel
- **Number of Days –** This field will populate automatically based on dates entered
- **Business Purpose –** Enter a clear, detailed business purpose for the expense
- **Description –** Optional field for additional description
- **Pre-Approval Type –** Select *Domestic*, *International*, or *Non-Travel*. If Domestic or International are selected, you will be asked to enter the **Destination** (City, State for Domestic or Country for International).
- **Cash Advance –** Select whether or not you are requesting a cash advance. If Yes, you will be asked to enter the **Cash Advance Amount** (Note: all cash advances must be requested and approved through a pre-approval report in Chrome River.)
- **Index (Allocation) –** Select the index(es) where the spending will be charged. To add more than one index, click **+ Add Allocation.** (Note that for pre-approval reports, the Index is only specified on the header, not on the individual expenses on the report.)

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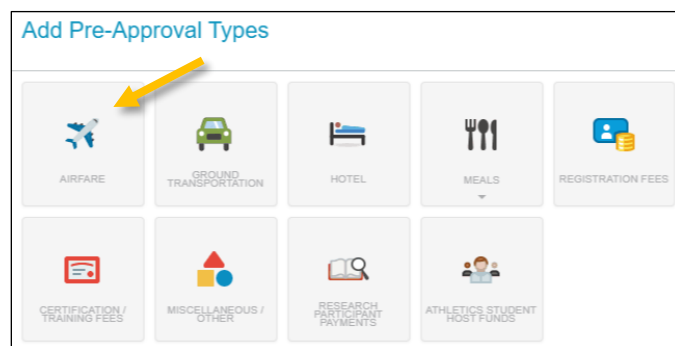

Add Expenses

3. Select an expense to add to the pre-approval report from the expense tile mosaic to the right. Tiles with a downward facing arrow at the bottom are "parent" tiles that have additional expense tiles organized under them.

4. Complete the expense tile form and click **Save** in the upper right corner to continue.

5. The expense will be added to your pre-approval report and visible on the report summary to the left. The expense tile mosaics will appear again on the right.

6. Continue adding expenses to your report by selecting the appropriate expense tile, completing the expense form, and clicking **Save** in the upper right corner to add to the report.

Submit

7. Once you have finished adding all expenses to your pre-approval report, click the green **Submit** button at the bottom of the report summary.

8. A submit confirmation will appear at the top right of the screen. Click **Cancel** to return to the report and make any changes. Click **Submit** to submit the pre-approval report to the approval workflow.

Submit Preapproval

I affirm that the expense estimates listed in this pre-approval are accurate and complete to the best of my knowledge. I understand that I must submit an expense report with actual spending and appropriate documentation within 60 days of the end of my trip or event in order to be reimbursed for any out-of-pocket expenses.

Cancel   Submit