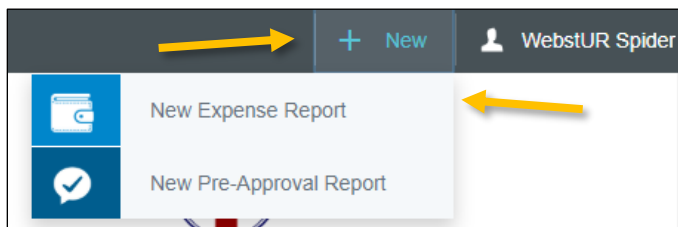


Note: Students do not have accounts in Chrome River. Accordingly, a faculty or staff member will need to complete the expense report on behalf of the student.

1. Click the + **New** button on the Navigation Bar and select **New Expense Report** report from the dropdown menu.



2. Complete the expense report header with the following:

- **Report Name** – Provide a descriptive, unique report name
- **Report Type** – Select **Reimbursement or Refund to a Current Student**
- **Business Purpose** – Enter a clear, detailed business purpose for the report describing why the expenses are reasonable, necessary, and appropriate
- **Student ID** – Begin typing the student’s URID and select the appropriate payee from the picklist
- **Address Confirmation** – Review the address listed for the payee in the Student ID field, and confirm its accuracy (*Any students with [DD] listed before their address are set up for direct deposit and will not receive a mailed check, so you can simply select Yes.*)
- **Travel Related?** – Select whether or not this reimbursement is for travel-related expenses
- **Approver** – Per the [Policy on Provision of Financial Resources to Students](#), payments to students may only be authorized by certain offices in limited circumstances. Choose the appropriate approver from the list of authorized approvers

If you indicate that the reimbursement is travel related, you will also be asked to enter the following:

- **Start Date** – Click the calendar icon to select the date of departure
- **End Date** – Click the calendar icon to select the date of return

- **Travel Type** – Select **Domestic or International**
- **Trip Destination** – Begin typing to select the City/State (Domestic) or Country (International) to which the student traveled
- **Trip Type** – Select either **Athletic Team** or **Student Travel**. This selection will be used to populate the account code for the report’s expenses

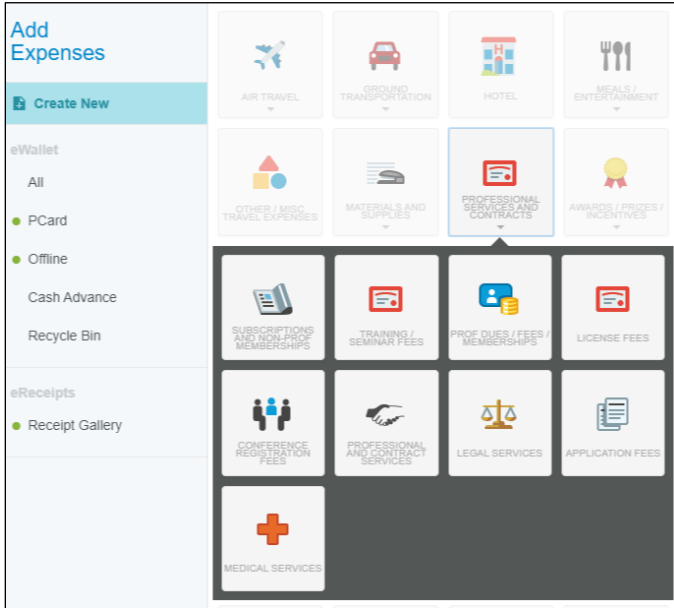
After the report header has been fully completed, click **Save** in the upper right corner to continue.

 A screenshot of the 'Expenses For WebstUR Spider' form. The form has a light blue header with 'Expenses For WebstUR Spider' and 'Cancel' and 'Save' buttons. The 'Report Name' field contains 'Application Reimbursement - Sample Student'. Below it is a blue box with instructions: 'For Expense Reports, please use a report name that is descriptive and unique. Examples: "NACUBO 2019 Annual Meeting", "Job Candidate Dinner – Asst Prof of Math", "Reimbursements – Aug 2019". For PCard reports, please include the card name and an indication of the date range in your report name. Examples: "Jane Doe's PCard Report – July 2019" or "Student Involvement 3 – 6/25/19 – 7/24/19".' The 'Report Type' dropdown is set to 'Reimbursement or Refun...'. The 'Business Purpose' field contains 'Reimbursing student for application fee'. The 'Student ID' field contains '12345678 / Sample Student -...'. There are two confirmation questions: 'Is the address shown above the correct address to use for this payment?' (Yes) and 'Is this a reimbursement for travel-related expenses?' (No). A yellow arrow points to the 'Save' button.

Add Expenses

3. Selecting **Create New** in the Add Expenses window will display an expense tile mosaic to the right. Select an expense to add to the expense report from the mosaic. Tiles with a downward facing arrow at the bottom are “parent” tiles that have additional expense tiles organized under them.

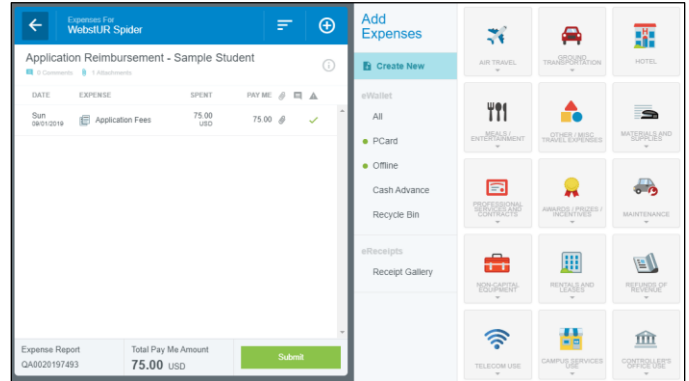
CHROME RIVER QUICK GUIDE – CREATING AN EXPENSE REPORT – STUDENT



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

The 'Application Fees' form includes the following fields: Transaction Date (09/01/2019), Spent (75.00 USD), Business Purpose (Graduate school application fee--no waiver available), Description (Optional), and Merchant (Optional). A note at the bottom states: 'Please type the Index you would like to search for in the box below. As you type, a drop-down list of matching items will be displayed for selection.' Below this is an 'Index (Allocation)' field. A yellow arrow points to the 'Save' button in the top right corner.

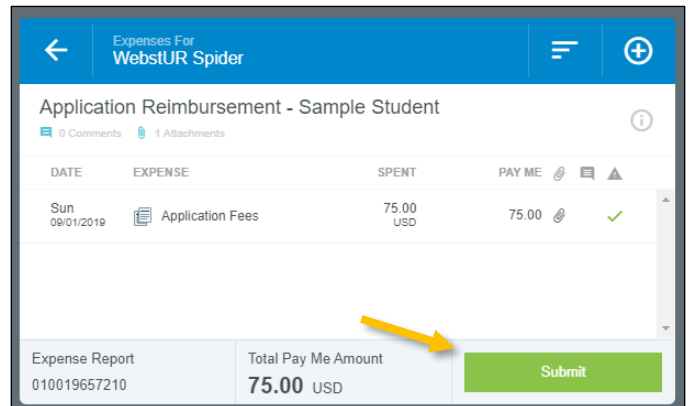
5. The expense will be added to your expense report and will be visible on the report summary to the left. The Add Expense page will appear again on the right side of the screen.



6. You may continue adding expenses to your report by selecting the appropriate expense tile, completing the expense tile form, and clicking **Save** at the top right.

Submit

7. Once you have finished adding all expenses to your 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 **Pre-Approval** to attach a previously submitted pre-approval report to your expense report for informational purposes. Click **Submit** to submit the expense report to the approval workflow.

The 'Submit Confirmation' dialog box contains a disclaimer: 'I affirm that this report is complete and accurate, and that all expenses being paid or reimbursed by the University are valid and comply with University policy. I affirm that any expenses claimed for reimbursement were paid with personal funds and have not been previously reimbursed through a submitted expense report or by an outside agency or third party. I affirm that no alcohol purchases being paid or reimbursed have been charged to a federal grant, and that any airfare payments or reimbursements charged to a federal grant comply with the Fly America Act or, when applicable, the Open Skies Agreement.' At the bottom are three buttons: 'Cancel', 'Pre-Approval', and 'Submit'.