Approvals in Chrome River – Quick Instructions

I. In Chrome River:
   a. On the Approvals bar, click either Expense Reports or Pre-Approvals to get to the expense reports and/or pre-approvals that need your approval.
   b. Select the report that you want to review, an overview of the report appears on the right half of the page.
   c. From the Overview page:
      i. A PDF of the report can be viewed or saved for your budget records.
      ii. Tracking can be selected to see where each expense is in the approval process.
      iii. The whole report can be either Returned or Approved.
      iv. Click Open on the overview page to see more details about each expense and to be able to return, approve, or adjust any individual expenses.
         1. After the report is opened, the Report Header shows on the right half of the screen.
         2. All expenses that need your approval are listed on the left half of the screen. This may not be all the expenses for the whole report, just the ones that require your approval.
            a. Click on the expense that you want to review; the expense details including the attachments appear on the right half of the page.
            b. At the top of the expense details, you can choose to Adjust or Return the expense. A note with the reason for the Adjustment or Return is always required. Any expenses that you adjust or return will have a comment bubble next to the line item. Any expenses that you return with have a red return arrow on the line item.
         3. Once finished reviewing the expenses and adjusting or returning as necessary, submit the expense report. Then click submit again for the submit confirmation. All expenses with a green checkmark by them will go on to the next approver. All expenses with the red return arrow will be returned to the expense owner.

II. Via Email:
   a. Anytime that you have an Expense Report or Pre-Approval to approve, Chrome River will send you an email. The email gives the details and description of each expense as well as any warnings that fired when the expense was entered and the response given to that warning. Attachments for the expenses can be viewed by clicking “View Receipts” at the bottom of the email.
      i. From the email, you may approve or return the entire expense report.
         1. Click the ACCEPT button to approve the entire report or the RETURN button to return the entire report. Clicking either button will cause an email window to pop up. Type any comments that you want to add to the report or just click Send if approving the report. If you chose to return the report, be sure to type the reason why you are returning it in the body of the email before clicking send.
         2. If you want to Adjust or Return individual expenses, you will need to log in to Chrome River.