Filing an Expense Report with Chrome River

Save Receipts online

- Add the App CRSnap to your phone
- Use it to take pictures of your receipts and to send them to your account. The receipts will appear soon but not always immediately.
- If you prefer not to add the app to your phone, you may scan the receipt, email it to yourself, and upload the receipt into Chrome River while you are filing your report. You may also forward it to receipt@chromefile.com and it will appear in your account.

Log into Chrome River

- **Type admin.sewanee.edu** into a search bar
- Select **Chrome River**
- Enter your **Banner sign-in** credentials
- The main page opens up
- "Dashboard" is on the left. Links to instructional videos are on lower right. "Approving Expenses" is helpful for those who are approvers.

Start the Report

- From the menu sections on the left (eWallet, Expenses, Pre-Approval), on the Expenses blue bar select "+Create" on the right-hand side of the blue bar.
- Report Name box: **Type month and year** according to the bill you received in the mail (July 2023) Note: You may do one report for multiple months, which is helpful if you've gotten behind. No need to do a separate report for each month.
- Business Purpose: **Pcard Expense Report** (or whatever your supervisor suggests)
- Additional details: not necessary but type more if you like or if your supervisor requests additional information
- Start Date: **27th of the previous month** (August 27)
- New Date: **26th of current month** (September 26)
- Do you have a University PCard? **Yes**
- **Save** (in upper right corner)

Enter Expenses

- "Boxes" of various files come up on the right
- Choose **Credit Card** (if you are processing credit card receipts: this is where people often go wrong by going to the Receipt Gallery or **Create New which results in you being reimbursed personally**).
- "Create New" is highlighted on the left; **don't choose it** unless you want to be reimbursed personally; instructions for personal reimbursement are listed below.
- Check the **small box** on the right of the first Credit Card icon and above the dollar amount
- Choose **Add (+)**
- At the top of your screen is the 4-digit account number Chrome River has selected.
- If you think it is the wrong choice, click the icon to the left of the Account Name (office supplies). Then select the correct option from the "boxes" which will appear. (for instance, Meals> staff meals-7515); make this as accurate as possible, not necessarily using budget numbers you've used in the past if new ones are more accurate.
- **Description** (this is optional)
- Allocation--**type your 6-digit index code or use dropdown menu to find the correct one**

(if you select an account for which you are not the approver, the expense will be submitted to the approver before being processed)

Adding Receipts to the report

- Select **Add attachments**
- Choose **Receipt Gallery** (it will contain CRSnap downloads or receipts you emailed to Chrome River; CR Snap downloads may take a few minutes to send the receipts to your account)
- OR
- Choose **Upload Attachments if you used another method besides CR Snap** (select downloaded image -- PDF, JPG, GIF from your computer files)
- **Select receipt**
- **Attach**
- **Save**

Note: If you have lost your receipt, please create a receipt by using a blank sheet of paper. Record the vendor's name, date of purchase, amount of purchase, business purpose for the purchase and sign the paper. Attach the paper as your receipt to the Chrome River Report.

Once you have done this with all receipts--**Submit**
You're all done--unless you have expenses such as mileage for which you should be reimbursed. If so, continue with the directions below.

Reimbursement to you for mileage or other expenses

- Go to the **home page** by selecting the three horizontal lines at the top left of the page.
- **Choose "Draft."**
- Select your expense report
- **Choose the plus sign +** with a circle around it from the top of the left page.
- **Create new**
- Choose **Ground transportation**
- Select **Mileage**
- **Type Date**
- Description: **Type reason for trip**
- Select **Calculate Mileage**
- Google Maps comes up
- **Enter start point and end point**
- Choose **"return to start"** for round trip
- Choose **"save trip"** and then **"save"**
- Repeat the process for additional expenses besides mileage to be reimbursed to you by choosing the correct category instead of Mileage
- **Go to the home page** by selecting the three horizontal lines at the top left of the page.
- The left screen shows your full report, with "spent" for credit card expenses and "pay me" for reimbursables. There should be green check marks to the right of each.
- Choose **Submit.**