**CHROME RIVER QUICK GUIDE – TRAVEL EXPENSE REPORT WHEN PROCARD MADE BY OTHER USER**

1. Once the ProCard Transaction appears in the ProCard Holder’s eWallet and that transaction supports another ECU Employee/Student/Resident traveling, the transactions(s) MUST BE MOVED to the traveler’s eWallet.
2. Go to the Team Dynamics Link located at the bottom of the Chrome River Home Page on right side.
3. Select Chrome River Service Request and Request Service and sign in.
4. Service Request Type – Select “Assign ProCard Charge to others” and complete the required information “description of Problem, ProCard Holder Name, Procard Holder Banner ID, Transaction Date, Transaction Amount,
5. Traveler Name, Traveler Banner ID, etc. if you have have more than one transaction answer YES to the “Add another transaction?”
6. Submit your ticket. It normally is completed within 5 minutes of you submitting your ticket.
7. Once confirmed the transaction is moved to the Traveler’s eWallet it is ready to be added to a report.
8. ProCard transactions must be processed within 25 days of receiving them in the eWallet; therefore many times, a Travel Expense Report must be completed PRIOR TO THE TRAVEL simply to expense the ProCard transaction(s), i.e. Airfare, Registration fees, etc
9. Completing a PREMATURE Travel Expense Report to expense the ProCard Transactions.

 Go to Traveler’s account and + Create New Expense Report.

1. IMPORT THE PREAPPROVAL
2. This will populate some of the fields on the Header Sheet; however others still must be completed.



1. Report Type, needs to be completed, whether it is Travel-Employee; Travel-Student, etc DO NOT USE PROCARD TRAVEL RECONCILIATION for this report type. It is used for other reasons.
2. Depart Date, Return Date, Times of departure and times of return.
3. Then you will notice in the Pre-Approval Expense Summary the attached Pre-Approval. Next to the name, hit the “X” button, this will then unattach “temporarily” the proper Pre-Approval. NOTE We will reattach at our last step, but this will avoid you having to delete all lines on the PreApproval, when only expensing the ProCard Transaction early.
4. Then in the upper Right Corner, click SAVE.
5. Go to the Credit Card Area and you will see the transactions that were recently moved. i.e. Hotel, Airfare, etc
6. Click on Airline First and select Add. Then complete the required information Description, Airfare Class, Airline, add the proper FOAP, and a receipt
7. Repeat process to add any additional ProCard Transactions. Note that only ProCard charges will generate a “Premature” travel expense report. If a traveler personally paid early for a trip, they will not be reimbursed until after the trip concludes.
8. Once you click submit on left side, you will see a Pre-Approval button on top right side.
9. Click the Pre-Approval and REATTACH the Pre-Approval that you originally selected in Step 11. This will then bring back at reattach that Pre-Approval.
10. Then Submit. Note you will get a warning stating “Expense Report Create Date is before the Start date” This is to be expected and simply put “ProCard Transaction” and post.
11. It is imperative that the PreApproval is attached, to ensure the Encumbrance that the Pre-Approval established against your budget lines is reduced by the amount of the ProCard Transaction.
12. When traveler returns from the trip, you will complete another Travel Expense Report for all reimbursable items, less the ones you expensed early, i.e. airfare, registration, etc
13. NOTE: It is possible to have 2 – 4 Expense reports for a Pre-Approval depending on the timing of the ProCard purchases, ie. Registration purchased 6 months early, Airline 3 months early, Hotel 2 months early and then after return.

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