Expense Management System

For Approvers

FAQs and Resources

Key points for Approvers:

- All approvals are electronic.
- You will need to know the appropriate PTAOs for your expenses
- Approvers are responsible for ensuring expense reports are complete and necessary and properly funded
- Ambassadors are there to help you!

Questions Approvers might have

Q. How will I know I have pending expense reports to approve?
A. The system will send an email to your inbox. You can approve or reject via the email, or sign in to CR to review additional details before approving.

Q. I know UVA policy is built in, but what about my department's policy, which is different?
A. The system will not allow a report to advance for approval if it isn't in compliance with UVA policy, as an approver, you will need to check for department -level compliance issues.

Q. What kinds of expenses require supplemental approval?
A. See "Expense Scenarios that Require Additional Routing for Approval -- it lists everything in detail!

Q. Why are we changing to another way of doing expenses?
A. The online system provides easier access, trackable routing, faster reimbursements, with fewer ways to make errors that delay the approval process. You'll always know where your report is within the process, and you can see all of your recent reports (pending and complete) in one place, with all documentation stored digitally.

Helpful Resources for Approvers

AMBASSADORS

Ambassadors are well-versed not only in the new system, but also, they know your school/unit policy and the routing structure for your report. They're your best first line of defense.

Nor sure who your Ambassador is? Check out the Ambassador Database!

ONLINE TRAINING & RESOURCES

On-demand training organized by topic, is available online, in both written and video form.

Other resources and helpful info about the system is also online.

Online training will be available February 20!

TRAVEL & EXPENSE TEAM

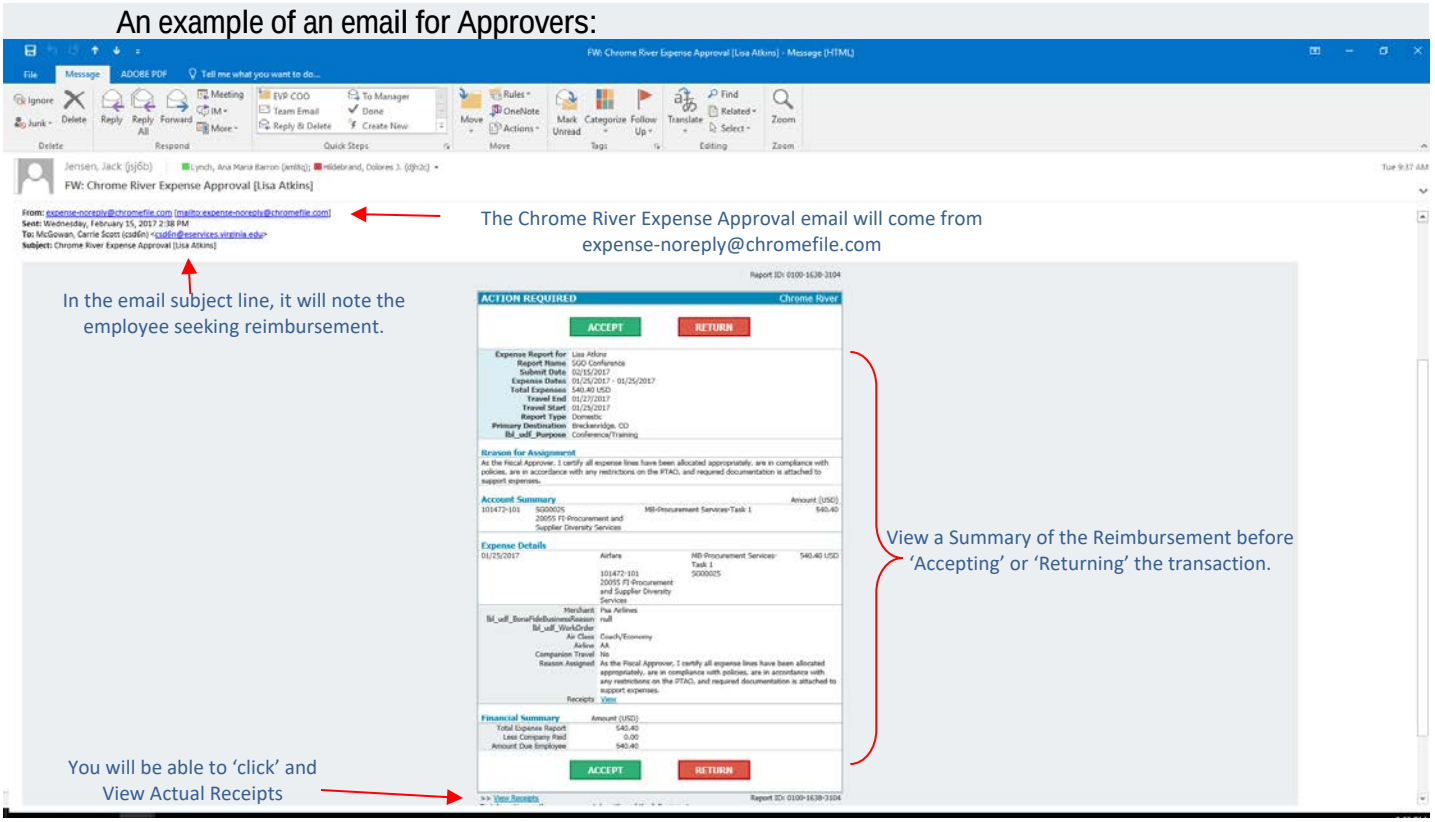
If you can't reach your ambassador, or you have a question or issue they can't resolve, please don't hesitate to contact a member of the T&E Team. We'll be happy to help!

EMAIL US AT travel@virginia.edu

Check out our in-person labs after Go-Live!

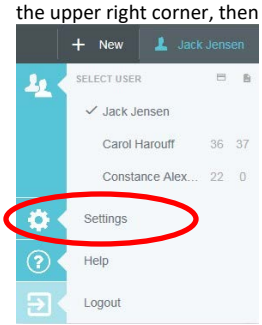
UVA Finance

An example of an email for Approvers:

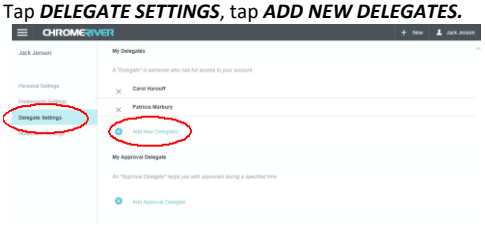


Authorize a User to Work for You

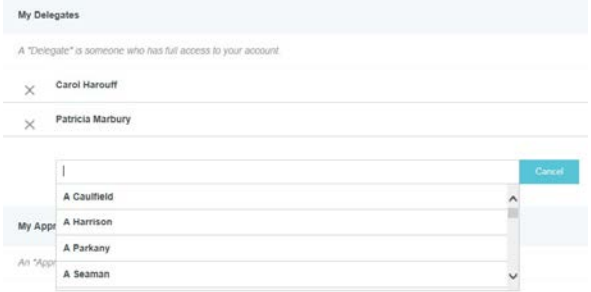
To add a user who is allowed to work as your delegate, tap you name in the upper right corner, then tap ***SETTINGS*** (circled in red)



Tap ***DELEGATE SETTINGS***, tap ***ADD NEW DELEGATES.***



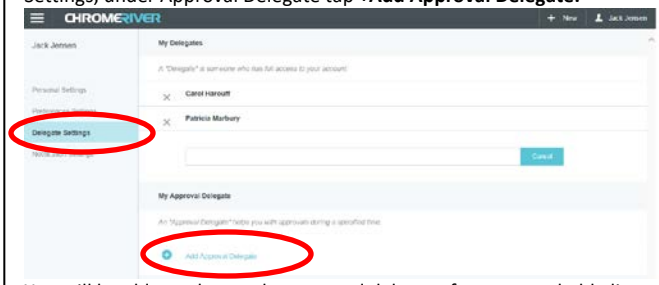
Click in the box, and then drag in the slider to scroll through the list of potential delegates or start entering the user's name from the drop down list.

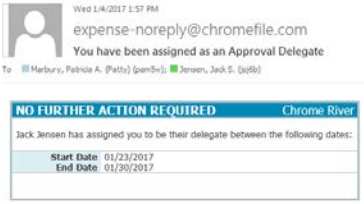


Once selected, the user will be able to create expenses on your behalf.

Approval Delegation

If you need to have another user temporarily approve expenses on your behalf, tap your name in the upper right corner, then tap **SETTINGS**. In Delegate Settings, under Approval Delegate tap **+Add Approval Delegate.**



You will be able to choose the approval delegate from a searchable list and set the Start and End Dates for the authorization to approve expenses on your behalf. Click **SAVE** when finished.

The delegate's name will appear with the range of dates during which he or she may approve expenses on your behalf. *You may only have one approval delegate working for you at a time.*Chrome River will send an email to the approval delegate describing the routing changes that will occur. All expenses assigned to you will automatically queue up for the delegate to approve. Regular approval emails will also be sent to the delegate.