

For Expense Owners/Delegates

Key points for Expense Owners/Delegates:

- You will need to know the appropriate PTAOs for your expenses
- Expense Owners can choose a delegate to act on their behalf
- The system is user-friendly and applies university policy
- Online Training is available & Ambassadors are there to help you!



Questions Expense Owners/Designees might have

Q. Where do I get the PTAOs I need for my report?

A. Check with your Fiscal Approver. You can also search in Chrome River using any part of the PTAO to locate it.

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 through the system if it isn't in compliance with UVA policy, and the approvers in your area will check for department -level compliance issues.

Q. Why did we choose the Ambassador model for Expense?

A. The Expense Management System touches anyone within UVA who incurs business expenses -- that's a LOT of people to train, so we chose a train the trainer model. Also, this model allows each school/unit to have subject matter experts who know about their particular area policies to be close at hand.

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 Expense Owners/Designees

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.

Not sure who your Ambassador is? Check 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 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!

UVAFinance

AN EXAMPLE OF AN EMAIL FOR EXPENSE OWNERS TO APPROVE:

The Chrome River Expense Approval email will come from expense-noreply@chromefile.com

In the email subject line, it will note the employee seeking reimbursement.

You will be able to 'click' and View Actual Receipts

View a Summary of the Reimbursement before 'Accepting' or 'Returning' the transaction.

AUTHORIZE A USER TO WORK FOR YOU

To add a user who is allowed to work as your delegate, tap your 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.