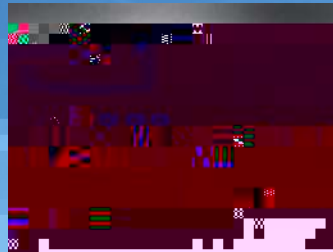


Getting Started

When are Pre-Approval Reports Required?

- 9 Overnight/international travel
- 9 Official reception & entertainment (not Chartwells)
- 9 Sponsorships

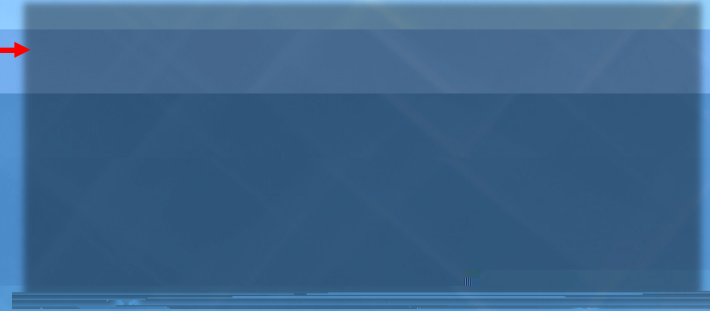
How Much Have You Been Approved to Spend?



BudgetInformation

This information is required on all reports and will be provided by your support staff.

- AccountCode(TripType) →
- Organization
- Fund
- Program



TripDetails

- 9 Travel Dates/Location/Business Purpose
- 9 All anticipated expenses
- 9 Backup documentation to attach
 - 9 Agenda/Schedule/Invite
 - 9 Quotes, invoice, etc.
- Student Travel
 - 9 Address for overnight stays
 - 9 List of attendees
- International Travel
 - 9 Referto [OG Ewebpage](#)

The screenshot shows the registration page for the 2023 NASPA Annual Conference. The header includes the conference logo and dates: APRIL 1 - 6, 2023 | BOSTON, MA. The main heading is "2023 NASPA Annual Conference" with a sub-heading "Don't wait! Early registration is open now through December 16, 2022!". There are two buttons: "Register Online" and "Access an Existing Account". A "REGISTRATION DATES" table is visible, showing periods for Pre-Registration, Early Registration, Regular Registration, and Late Registration. Below this is a section for "ATTENDEE REGISTRATION RATES" with a "Select" dropdown menu. At the bottom, a table titled "Annual Conference" lists registration rates for Early, Regular, and Late registration.

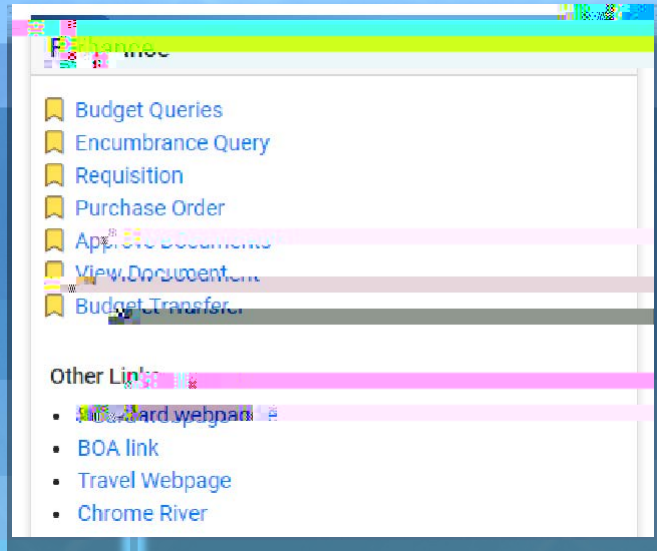
	EARLY	REGULAR	LATE
Annual Conference Registration	\$485	\$535	\$595

Logging In

- L

- 

- Link to Chrome River is housed under Finance - Other Links

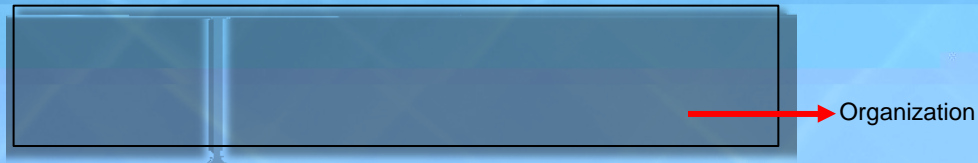


Creating a Pre-Approval Report

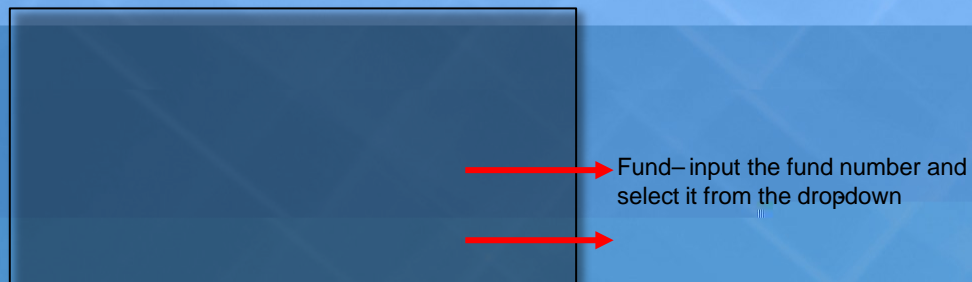
- From your dashboard, click the +CREATE button

Completing the Pre-Approval Report Header

- Input your organization number and select it from the drop-down



- Once the org has been selected, two additional fields will appear



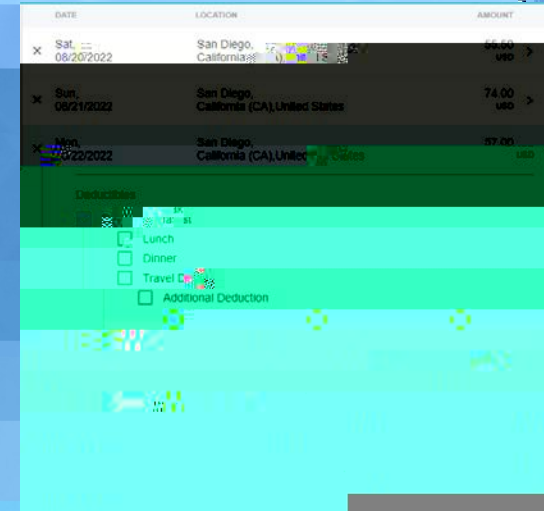
Adding Pre-Approval Expense Types

- The preapproval is an estimate; however, you want to include all anticipated expenses
- If you are not staying at a conference hotel or hotel suggested by the conference organizer, [per diem rates](#) apply.
- Meals provided by the conference must be deducted from your per diem meals.

Click on the Meals tile > Per Diem Wizard



Enter Start and End Dates and Location

A screenshot of a form titled 'Per Diem Wizard'. The form has a light blue background. There are three main input fields: 'Start Date' with a calendar icon and the date '08/20/2022', 'End Date' with a calendar icon and the date '08/21/2022', and 'Location' with a dropdown menu showing 'San Diego, California (CA), United States'. There are also some smaller input fields and checkboxes below these.

DATE	LOCATION	AMOUNT
Sat, 08/20/2022	San Diego, California (CA), United States	65.00 USD
Sun, 08/21/2022	San Diego, California (CA), United States	74.00 USD
Mon, 08/22/2022	San Diego, California (CA), United States	97.00 USD

Deductions

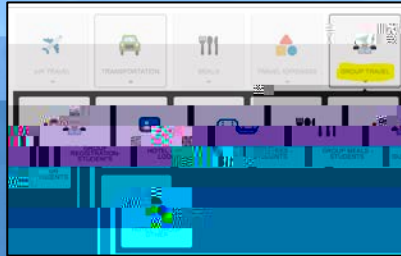
- Breakfast
- Lunch
- Dinner
- Travel Expenses
- Additional Deduction

StudentTravelPreApprovals

- Additional questions will populate the report header “Student Group Travel” selected as the Report Type



- When adding expenses, it may be helpful to utilize the expense types under the Group Travel tile



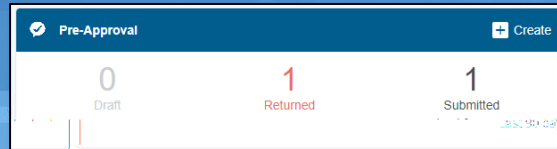
- Overnight Trips with Students
 - o There will be one preapproval report done under the faculty member's name and a separate report done under the "SU Student..." profile
 - o The hotel name and address must be included on the hotel expense line item
 - o Any changes or

Adding



Submitted Reports

- Tracking your pre-approval
 - From your dashboard, click on your submitted pre-approval reports
 - From the submitted reports grid, click on the desired report to preview it. Then click on TRACKING in the preview.
- Returned reports - you and your delegates will receive an email if your report is returned
 - o Email will include why it is being returned – this will post as a comment on the report header
 - o Login and access the returned report from your dashboard



- Open the report, address the issues

PcardUse& TravelTips

- All individual Pcards are open with a \$5,000 credit limit/single transaction limit of \$3,500.
- Always [check your available Pcard balance](#) prior to traveling.
- We are sales tax exempt in New Jersey, Florida, and Massachusetts. Please provide vendors with the appropriate documentation, located on the [Tax Compliance webpage](#).
- International Travel - To prevent issues with the use of your Pcard and international trips, please call Bank of America at 866-8262 prior to your travel to notify them of your dates of travel and destination.
- Itemized receipts are required to reconcile transactions.
 - Hotel folios
 - a

Resource & Contact Information

- Visit our [Pcard](#) and [Travel](#) webpages
- Pcard requests or questions: Pcard@stockton.edu
- Travel or ChromeRiver questions: Travel@stockton.edu