FM Chrome River Approval Process

 The FM will receive an email from <u>expense-noreply-c5-prod@ca1.chromeriver.com</u> that the OSP review staff has reassigned a report for approval. Email View:

	2. Report ID: 0100-2631-5920		
ACTION REQUIRED	Chrome River		
Expense Report for	Leann Koon [Research Professional]		
Report Name	WTI WSF Speaker Travel Support Knickerbocker		
Submit Date	05/03/2022		
Expense Dates	04/15/2022 - 04/15/2022		
Total Expenses	1,150.20 USD		
Prior Approvers	Robert Eichenberger [05/16/2022 GMT]		
	Jamie DuHoux [05/10/2022 GMT]		
	Carolyn Marx [05/04/2022 GMT]		

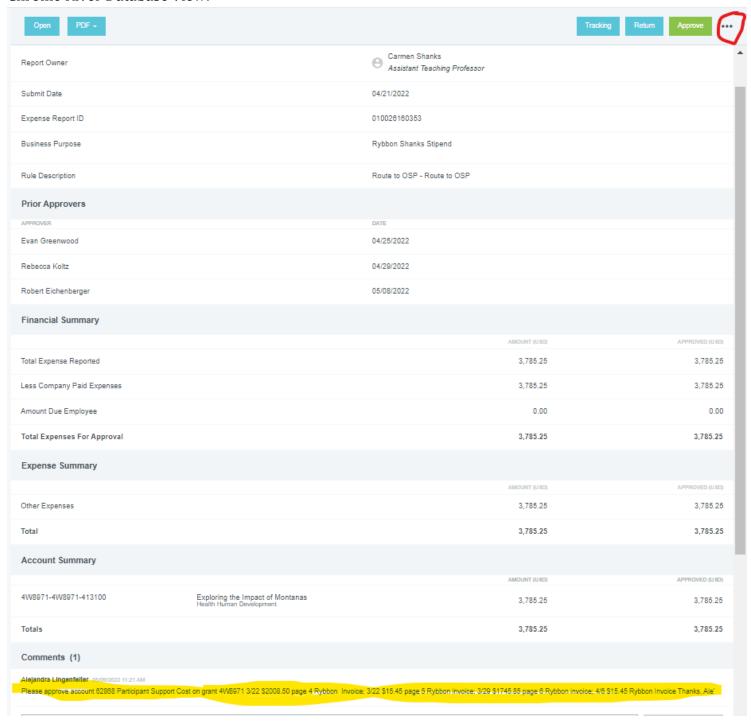
Report Notes

05/19/2022		Please approve account 62868T- Participant
		Support Travel on grant 4W9095 4/15
		\$1105.20 page 3-4 Travel Cafe invoice. Thank
		you, Ale'

Account Summary	,		Amount (USD)
4W9095-4W9095-	WSRTC Meeting Coordination	Western Transportation	1,150.20
421470	Western	Institute	

- 2. Notice the highlighted text above with the needed approval details
- 3. The OSP review staff has already reviewed the entire report for compliance, your approval is the final step
 - a. If this is enough info to make your decision- click Approve" at the bottom of the email. (<u>Do not reassign back to the OSP accounting staff</u>) this finalizes the transaction and posts to Banner.
 - b. If you need additional details, you may click on "View" within the email text to see the specific receipts within Chrome River. Click "Approve" in the upper right-hand corner of the Chrome River screen. Again, <u>do not reassign back to the OSP accounting staff</u> this finalizes the transaction and posts to Banner.

Chrome River Database View:



4. You can make comments within Chrome River and save them. This is only informational and *does not* route the report or approve it. It will remain in your queue.

5. <u>If revisions need to be requested</u>:

- a. Discuss issues outside of Chrome River with your departmental accountant or FSS contact.
 - i. If you don't know whom to contact, FSS is listed in the Prior Approvals section of the report
- b. If it is determined a change is needed before you can approve the report:
 - i. In the comments section of the Chrome River report, note the changes you are requesting to be made and add the <u>REQUIRED</u> text: <u>Please Reassign to OSP for Final Approval</u>
 - ii. Click on the three dots to "Reassign" in the upper right-hand corner of the screen
 - iii. Enter the name of the individual you are reassigning the report to.
 - iv. Please do not RETURN or REASSIGN the report to the "expense/report owner"
 - 1. We have worked with FSS to assure them that we would reassign the reports to them so they can coordinate with report owners and resubmit both timely and appropriately.
 - v. Note: OSP review team cannot make changes to the Chrome River reports this needs to be done by FSS.

Questions can be directed to any of the OSP review team members