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Approval Actions in Chrome River

RECALL, RETURN, ADJUST

Submitted Expense Reports may require edits if the information is inaccurate. Depending on the nature of the correction, Chrome River allows different actions for different roles. This job aid describes each action, the role associated with the action, and what can be edited with each action.

Recall	Return	Adjust*
Role: Expense Owner	**Role: Approver**	**Role: Approver**
An expense owner can recall expenses at any time until fully approved in the system. When an Expense Report is recalled, it deletes approvals and will reroute for approvals.	An approver can return Expense Reports. When an Expense Report is returned, modified, and resubmitted, it will route directly back to the approver who returned the Expense Report. All other approvals for the Expense Report will be retained and will not have to be approved again.	An approver can adjust an Expense Report without having to return it to the expense owner for correction.
Edits allowable in this mode: • Edit *Report Name*. • Edit *Business Purpose*. • Edit, delete, or add expense lines.	**Edits allowable for expense owner after Expense Report is returned by approver in this mode:** • Edit *Report Name*. • Edit *Business Purpose*. • Edit dollar amounts. • Delete expense lines. • Edit *Allocation* for existing expenses. • Change the expense types. (Exception: Itemized expense types cannot be changed to non-itemized expense types and vice versa.) **Unavailable edits:** • Cannot add expenses. Approvers can use the *Return Comment* field to communicate to the expense owner the reason the report is being returned. *Return Comment* is limited to 245 characters.	**Edits allowable in this mode:** • Decrease out-of-pocket dollar amount. • Edit allocation. • Edit account code (limited by the expense tile; see Step 6c below for more details). • Edit attachments. **Unallowable Amounts and Approver Adjust Best Practice** **Entire Amount Unallowable:** UMN Paid (Travel Card) • Approver returns, expense owner marks as unallowable. Out-of-Pocket • Approver returns, expense owner deletes the expense line. **Partial Amount Unallowable:** UMN Paid (Travel Card) • Approver returns, expense owner marks portion as unallowable. Out-of-Pocket • Approver decreases spent to be the appropriate amount.

Approval Actions in Chrome River (cont.)

*Adjust is not available to all approvers. Only units opting to turn on the Adjust feature have access to this option.

STEPS FOR USING ADJUST

Log in to MyU (myu.umn.edu). Navigate to: **Key Links > U Travel > Chrome River Login.**

Note: Approver must navigate to Chrome River as this feature is not available via email approval.

1. In the Approvals bar, click the <Expense Reports> link.
2. Double-click a report to open it for editing.
3. Select the line that requires adjusting.
4. Click <Adjust>.
5. Enter the justification for the adjustment in *Approver Note Required* (field is not limited).
6. Adjust the fields requiring edits.
    a. *Approved* (amount)
    b. *Allocation*
    c. *Allocation Account Code* (If an expense account code is outside the expense tile used, only the expense owner can change. The Expense Report would need to be returned to the expense owner. Note: See the "Expense Types in Chrome River" job aid for more information.)
    d. *Attachments*
7. Click <Save> to record the changes.
8. Click <Submit> to advance to the **Submit Confirmation** page.
9. Click <Submit> on the **Submit Confirmation** page to validate the approval and route to the next step or approval.

The expense owner will automatically be notified via email of the changes to the Expense Report.