

# Approval Guidelines in Chrome River

Reports submitted via Chrome River require approval at multiple levels. The first level of approval is applied by Chrome River. Chrome River applies built-in system checks based on University and federal compliance rules and flags expenses requiring resolution. Approvers are expected to review specific information on the report prior to approving. This job aid is based on the “Guidelines for Approvals and Routing of Financial Transactions” procedure in the Policy Library ([policy.umn.edu](http://policy.umn.edu)).

## APPROVER’S CHECKLIST

Approvers are responsible for approving, denying, or returning reports after verifying the following:

Chrome River System checks built into Chrome River based on policies.	Supervisor	Approver’s DeptID and Certified Approver*
<input checked="" type="checkbox"/> Rate Compliance (per diem meals/per diem lodging) <input checked="" type="checkbox"/> Duplicate Expenses <input checked="" type="checkbox"/> Missing Amounts <input checked="" type="checkbox"/> Missing Attachments <input checked="" type="checkbox"/> Exchange Rates <input checked="" type="checkbox"/> Meal and Hospitality Rules <input checked="" type="checkbox"/> Alcohol Allocation <input checked="" type="checkbox"/> Pre-Approval required	<input type="checkbox"/> Dates <input type="checkbox"/> Destination <input type="checkbox"/> Is the trip okay to take, does the purpose of the trip fit the person’s position, responsibilities, etc.? <input type="checkbox"/> Amounts reasonable	<input type="checkbox"/> Dates and Locations (against per diem meal/per diem lodging) <input type="checkbox"/> Compliance Violations <input type="checkbox"/> Appropriate and within policy <input type="checkbox"/> Are expenses allowable for the type of activity? Can money be spent on this? <input type="checkbox"/> Allocation/ChartField string + Allocations are accurate + Expense types and account codes are accurate <input type="checkbox"/> Attachments are detailed and accurate (receipts/documentation) <input type="checkbox"/> Amounts are accurate <input type="checkbox"/> Funding available <input type="checkbox"/> Allowable per Notice of Grant Award (NOGA) *CA reviews allocations for sponsored transactions.

## APPROVAL MATRIX

Approver(s)	Criteria for Routing
Supervisor	+ Pre-Approval Reports + Expense Reports
DeptID Approver(s)*	+ Expense Reports + Non-Sponsored Transaction Types
DeptID Certified Approver	+ Expense Reports + Sponsored and Cost Share Transaction Types
Chief Financial Manager	+ Expense Reports with Policy Violations
Controller’s Office	+ Hospitality Policy Violations

\*Routing to the DeptID approver(s) follows the DeptID value in the allocation(s). If an individual fills multiple approval roles in Chrome River, the report will only route once for review.