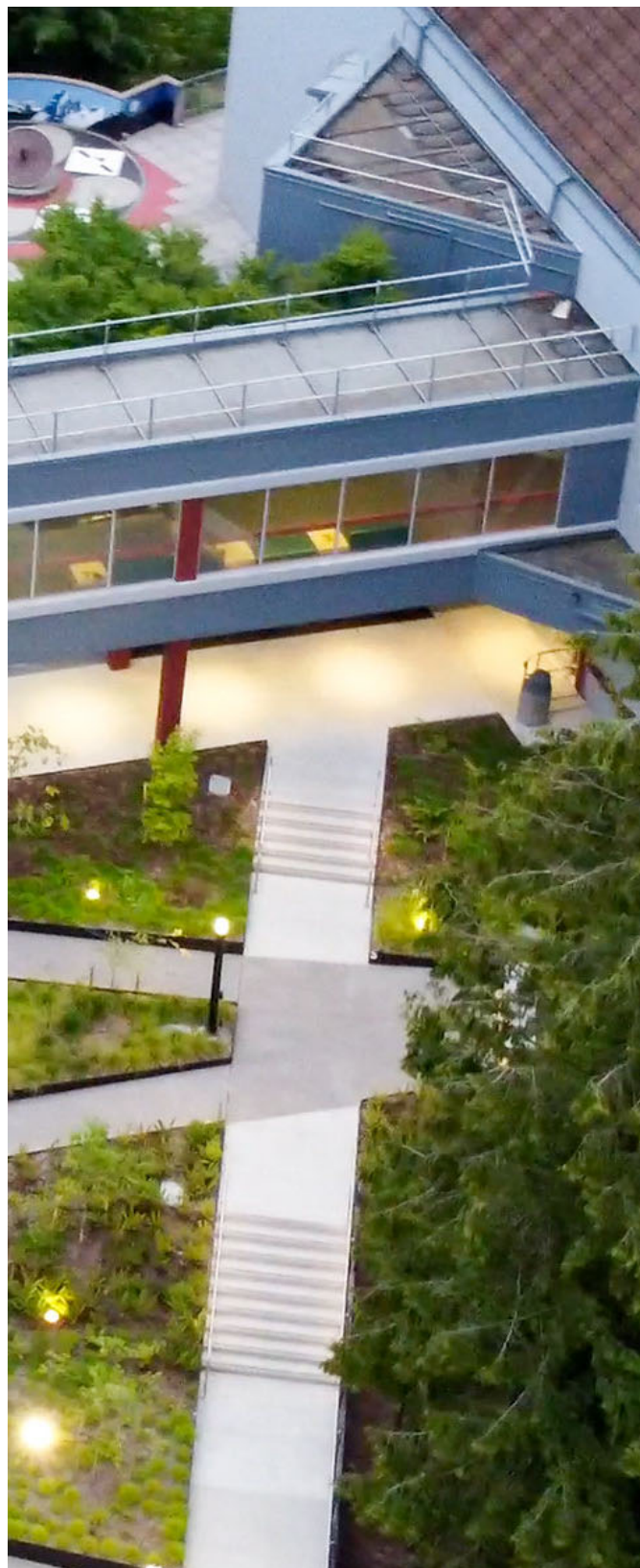


# Expense Management System

USER GUIDE

Version 1.3



UNIVERSITY  
OF THE FRASER VALLEY

# Document Change Control

Version	Date	By	Changes Made
0.1	27-Apr-2024	Soud Almudhaf	Document Created
1.0	11-May-2024	Soud Almudhaf	Version 1.0
1.1	15-May-2024	Deanna Stelting	Version 1.1
1.2	24-May-2024	Soud Almudhaf	Consolidated changes
1.3	29-May-2024	Soud Almudhaf	PD/DTA Changes

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# Introduction to Chrome River

Chrome River is an expense management system that streamlines the expense submission process by allowing submissions of expense reports from anywhere, via website or iOS / Android apps. Chrome River provides automatic approval routing, claim tracking, online receipt storage, OCR-based receipt reading, spend tracking, compliance controls, faster processing, the ability to save unsubmitted expense reports as drafts and the ability to submit a claim at any time.

## Definitions

Here are some commonly used terms in the Chrome River application, and throughout this guide:

**Expense Report** – A self-contained request for reimbursement of expenses, equivalent to an expense claim. This includes the claim name, expense type and the fiscal year which the expense applies to. PD expense reports also include the PD number that has been assigned once a PDF PD application has been reviewed and approved in Human Resources.

**eWallet** – Where uploaded receipts and issued advances reside before they are applied to a claim.

**Expense Tile** – A visual representation of a type of expense that can be added to an expense report. For example, “Airfare” and “Hotel”.

**Allocation** – This is the term used in Chrome River to mean index or budget code. This is the budget code that the expense will be applied against. This field is especially important, and expenses will be returned if it is filled in incorrectly. Please always ensure expenses are coded to the correct budget code.

## Deadlines

Expense reports must be submitted within 30 days of when the expense was incurred. Expense reports may take up to 2 weeks to process after being received in Financial Services though errors on submitted expense reports may delay processing. PD Applications must be submitted and approved before any expenses are incurred on PD activities. PD Expense reports for events must be submitted within 10 days of activity completion, and PD Expense reports for tuition must be submitted within 10 days of payment receipt.

DTA applications will no longer be required. The DTA expense report will replace the application form – simply submit an expense to use available DTA funds through Chrome River and it will be processed entirely in Chrome River.

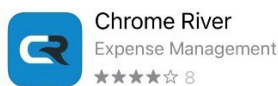
# Accessing Chrome River

Chrome River can be accessed through MyUFV ([my.ufv.ca](http://my.ufv.ca)) or by using the following URL:

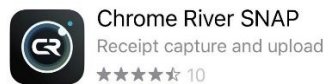
- [Chrome River SSO](#)

For authentication, Chrome River uses Single Sign-On (SSO). If you have already logged into SSO for another application such as MyUFV, or the UFV network, you will not be required to sign in. If you are not logged in to SSO, you will be asked to log in using your UFV email address and computer password.

On mobile devices, you can use the *Chrome River* app which contains the same functionality as the website, and the *Chrome River SNAP* app to digitally capture receipts and automatically upload them to your Chrome River account.



OPEN



OPEN

Visit the [Chrome River help](#) page for more information on how to setup the Chrome River apps on mobile devices.

You can also send your receipts as attachments by e-mail to [receipt@ca1.chromeriver.com](mailto:receipt@ca1.chromeriver.com) from your UFV email address. Once Chrome River has processed the receipt, you will be able see it in your eWallet and your Receipt Gallery.

Chrome River is compatible with Windows and Mac, using either Chrome, Firefox, or Safari. Chrome River is also iOS and Android compatible, preferably using the apps listed above but also through Chrome and Firefox on mobile.

*Note: The maximum file size for individual images uploaded via the app is 10 MB, and JPG, PDF, PNG, OFD, and TIFF files are accepted.*

## Quick-Start Video

The video from Chrome River below will help you get up and running quickly:

<http://fast.wistia.com/embed/iframe/54b5sxfj2u>

# Expense Reimbursement

## Navigating the Chrome River Dashboard

Your Chrome River Dashboard has four main sections on the left-hand side:

- **eWallet** – lists any imported receipts that have not yet been added to an expense report.
- **Approvals** – lists expense reports awaiting approval. This section is only visible to those employees with Spending Authority.
- **Expense** – where you can create, save, edit, submit and track your expense reports.
- **Pre-Approval** – where you can create, save, edit, submit and track your pre-approvals.

The settings menu can be found by clicking on your name in the upper right-hand corner of the screen. Within the settings are various Notifications that can be managed along with the Delegate settings. See [Setting up Delegates in Chrome River](#) for more information.

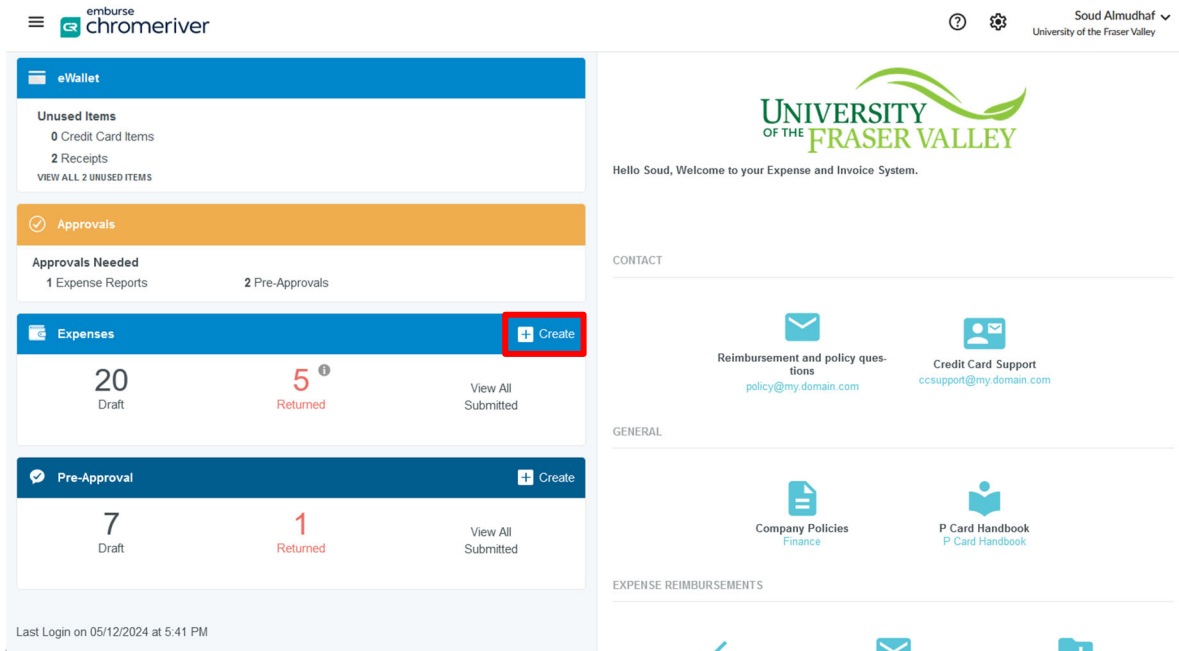
The section on the right of the dashboard links to Financial Services policies and procedures, support e-mail addresses, help guides, and app downloads can be found.

The screenshot displays the Chrome River dashboard interface. At the top left, the 'emburse chromeriver' logo is visible. The top right corner shows the user's name 'Soud Almudhaf' and the organization 'University of the Fraser Valley'. The dashboard is divided into two main columns. The left column contains four primary sections: 'eWallet' with 0 Credit Card Items and 2 Receipts; 'Approvals' with 1 Expense Report and 2 Pre-Approvals; 'Expenses' showing 20 Drafts and 5 Returned items; and 'Pre-Approval' with 0 Drafts and 0 Returned items. The right column features the University of the Fraser Valley logo and a welcome message. Below this, there are sections for 'CONTACT' (Reimbursement and policy questions, Credit Card Support) and 'GENERAL' (Company Policies, P Card Handbook). At the bottom, there is an 'EXPENSE REIMBURSEMENTS' section with three icons.

# Creating an Expense Report

An expense report can be created for a single expense, or a grouping of expenses related to an event. Multiple events can also be combined into a single expense report.

1. To begin, on the Dashboard click **+CREATE** in the Expenses section.




2. The Expense Header section stores the basic information for an expense report that applies to every expense listed in the report. In the header, these fields must be completed:
  - *Report Name*: a unique name assigned to the report that can be used for tracking the report throughout Chrome River – i.e. “Ellucian Conference April 2024”
  - *Expense Report Type*: select the most appropriate type of report; for most expense reports this will be “Expense Claim”. If you are creating a PD Expense Report, make sure you have the PD number assigned by HR available to be entered.
  - *Fiscal Year*: select the appropriate fiscal year for the activity being claimed. Leave default fiscal year unless you are applying for an expense in the prior year. Guidance will be provided by Accounts Payable on when this can be done.

Once the required fields have been filled in, click SAVE.

Cancel Save

---

 **Expenses For Soud Almudhaf**

---

Import from Pre-Approval <small>Optional</small>	<span>IMPORT PRE-APPROVAL</span>
Report Name	<input type="text"/>
Expense Report Type	<span>Expense Claim</span> ▼
Fiscal Year	<span>FY25</span> ▼

## Adding Expenses

If the 'Add Expense' screen is not already displayed, click the + button or the **+ADD EXPENSE** button in the line-item list to add your first expense to the report. Line items can be added by selecting receipts that have been imported into Chrome River or by choosing an expense tile.

### **Add Expenses From the eWallet or Receipt Gallery**

When images are uploaded to Chrome River, either using the website or the apps, they will be scanner using OCR and a determination of the expense type will be applied. The expense type can be adjusted once an image is applied to an expense report. If there are outstanding receipts available to expense, then:

1. Select the applicable receipt(s) from the eWallet or the Receipt Gallery by clicking the checkbox above the amount. You may select multiple receipts.
2. Click the Add button.
3. Select whether you wish to add them to an existing draft report or create a new report.



Add to Expense Report
✕

Select an existing draft expense report or create a new expense report.

+
Create a New Expense Report

<b>Expenses on 01/18/2018 9:21 AM</b>	01/18/2018	10.00 USD	✓
<b>Expenses on 01/18/2018 9:25 AM</b>	01/18/2018	1.00 USD	✓

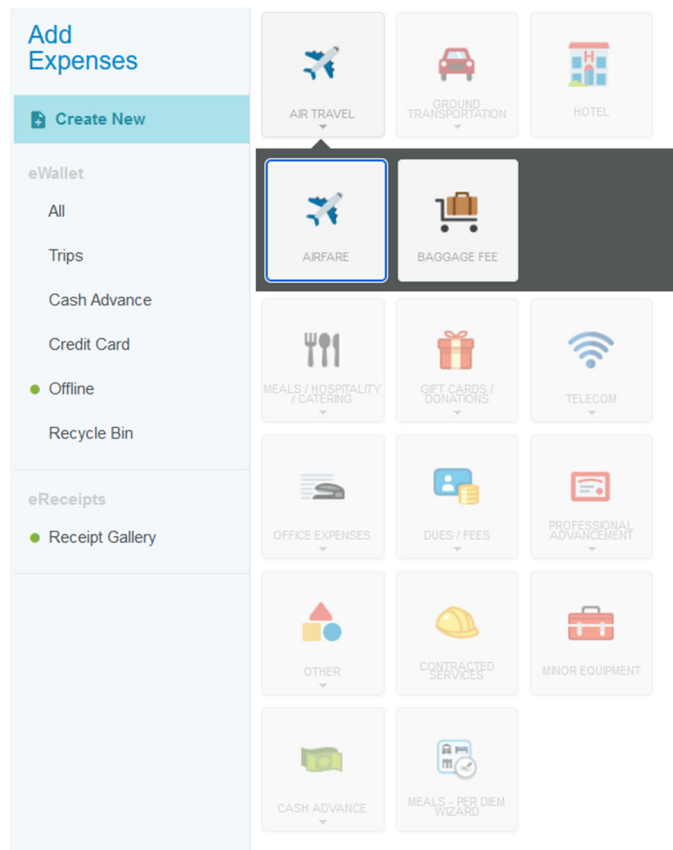
**Note:** Once a receipt has been used on an expense report, it will disappear from the Receipt Gallery to prevent it from accidentally being used on multiple expense reports. However, if the expense report or line-item to which it is attached is deleted, or if the receipt is deleted from the report, images originally uploaded to the Receipt Gallery will reappear in the Receipt Gallery.

Images that were attached directly to the report rather than uploaded to the Receipt Gallery first will be removed from Chrome River when the expense report or line-item is deleted. To prevent this, use the paperclip button in the upper-left corner of the Image Viewer to detach the receipt before you delete the line item or the expense report. This will send it to the Receipt Gallery

### Creating New Expenses

This allows manual entry of expenses before adding receipts to the expense report, if required. If a down arrow exists on the tile, there are subcategories below that can be selected. The benefit of using Chrome River is that the expense budget account number, applicable to that type of expense and used in Banner, is tied to the expense tile.

Select the expense tile for the desired expense type. If the expense type needs to be changed, while viewing the details of the expense line, click on the expense type at the top of the page to select a new expense tile.



## Expense Details

There are many standard details required on the different expense types.

Airfare

---

Date

05/13/2024

Spent

0.00

CAD

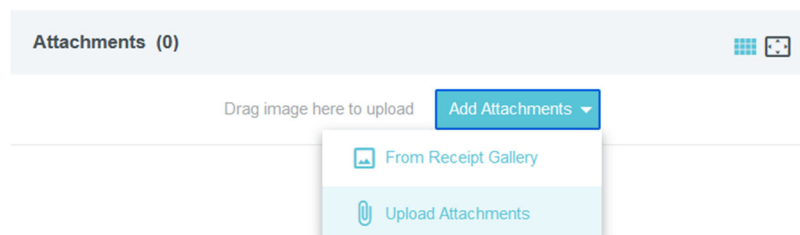
Location

Business Purpose

Description

- *Date*: This is the date the expense was made. It will autofill to today's date.
- *Spent*: This is the amount that was spent. Clicking on the currency box next to the field will allow you to input spend in another currency. All transactions will be automatically converted to CAD.

- **Location:** Location should always be set to where the expense was made. For example, when buying airline tickets to the United States, the location should be set as ‘Canada-British Columbia’ if the tickets were purchased in British Columbia. This field determines how taxes are applied. For any transaction outside of Canada, please use ‘Canada – Other’.
- **Summary:** This field should contain the purpose of the expense – for example “Teacher’s Conference”. This field is used to differentiate between multiple expenses for different events, such as when expensing airfare for two events. This summary information is passed to Banner and is what shows within FAST.
- **Description:** This field should contain a detailed description of the expense. For example, the dates of the event, location of the event, or further details of what was purchased.
- **Merchant:** This is the name of the business / lodging / establishment that the expense was incurred at.
- **Tip Amount:** This field is optional and is used to define any tips provided at the time of purchases. Tips are added to the Spent amount.
- **Tip Percentage:** This field is not editable. It will calculate the percentage of the total that the amount inserted into the Tip Amount field is. If the tip percentage exceeds the amount defined in the Business and Travel Expense Procedures, the line item will be flagged, the amount will not be accepted by Accounts Payable, and the expense report will be returned for correction.
- **Allocation:** This section is split into 3 fields – index (or budget) code, activity code and location. These fields determine how the expense will be coded in Banner. These fields are especially important, and expenses will be returned if they are filled in incorrectly. Please always ensure expenses are coded to the correct budget code. In Activity, include the name of the person who is benefitting from the activity if it corresponds to SOFI rules, otherwise input the activity code if it is used in your department. The location code should be “\*NA Not Applicable” unless location codes are regularly used in your department. The ‘Add Allocation’ button allows an allocation to be split across multiple budget codes / indexes at the specified amount or percentage split. Split allocations will need to be approved by the designated spending authority of each budget code/index applied. More information on how to set Allocations can be found in the How to Set Allocations section below.
- **Attachments:** If the expense type has not been created from a pre-uploaded receipt, this section will be used to upload supporting receipts and documentation. Most expense types will require a detailed receipt to be uploaded and will require justification if one is missing. Multiple receipts can be attached to a single line-item if needed. See the Business & Travel Expense Procedures for more details.


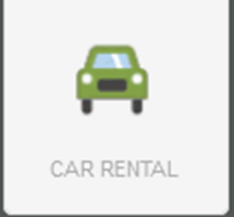






- **Guests:** Some expense types, for example airfare, also require the guests to be listed, including when it has been purchased for yourself. There are two types of guests, Internal and External.
  - Internal – internal guests are employees of UFV. Select Internal from the drop-down menu, then type the name of the guest, or your name in the text box. Select the appropriate name from the menu that is populated based on what you have typed in.
  - External – an external guest is anyone outside of UFV. For example, if you paid for a business meeting which included an external guest, choose External from the drop down. If there are no external guests listed when you type in a name in the textbox, click on Add New External Guest from the drop down and fill in the appropriate information. This external guest will be saved and can be selected again in the future.

By default, the amount spent on the expense will be split evenly between the guests. This can be changed by updating the percentage or amount next to each guest. Guest lists may be uploaded into a line item using a CSV file. For more information on how to do this, plus a template you can use, please visit this link [https://help.chromeriver.com/hc/en-us/articles/15295572183437-Add-Guest-Expenses-to-a-Report#h\\_01HKB9EG4DRBVTZ7JRZCG44F39](https://help.chromeriver.com/hc/en-us/articles/15295572183437-Add-Guest-Expenses-to-a-Report#h_01HKB9EG4DRBVTZ7JRZCG44F39).

**Note:** Per Diems can be combined with individual Breakfast / Lunch / Dinner expense line-items as long as they do not occur on the same days.

The below table details the unique fields that can be found on certain expense types:

Airfare		<p><b>Airline:</b> Select the most appropriate selection based on the airline that was booked. If the airline is not listed, select “Other”.</p> <p><b>Class:</b> UFV policy requires all flights to be on the lower tier available. For tiers other than “Economy/Coach” a valid reason will be required.</p> <p><b>Guests:</b> This is a mandatory field. More information on how to add Guests can be found above.</p>
Car Rental		<p><b>Rental Agency:</b> Select the rental agency used. If the agency is not listed, use “Other”.</p> <p><b>Class:</b> UFV has restrictions on the type of class that can be rented. See the Business &amp; Travel Expense Procedures for more details</p>
Mileage		<p><b>Rate:</b> The rate is determined based on the date that the mileage is being claimed for and cannot be changed.</p> <p><b>Kilometers:</b> The ‘Calculate Mileage’ wizard must be used, or the expense cannot be submitted. The mileage wizard uses Google maps and will require a start and end point be entered. It will then calculate the distance traveled and automatically enter a snapshot of the route as an attachment to the expense type. Additional destinations can easily be added within the wizard.</p>

		<p><b>Deduction:</b> If a distance or an amount needs to be deducted from the total, this field can be used. Select 'Distance' or 'Amount' from the box next to the field and enter the deduction amount.</p>
<p><b>Hotel</b></p>		<p><b>Check In Date:</b> This is the date that the hotel was checked in to.</p> <p><b>Check Out Date:</b> This is the date that the hotel was checked out from.</p> <p><b>Guests:</b> This is a mandatory field. If booking lodging for yourself, ensure you add yourself to this list. The percentage/amount fields allow the lodging cost to be split among two or more guests. See above for more details on Guests. Red text below this field prior to it being filled is a known issue.</p>
<p><b>Meals – Per Diem Wizard</b></p>		<p><b>Start Date:</b> The start date of the event for which Per Diems apply.</p> <p><b>End Date:</b> The end date of the event for which Per Diems apply.</p> <p><b>Days:</b> This field cannot be edited. It calculates the number of days between the start and end dates defined above.</p> <p><b>Location:</b> The location where the Per Diems applied. For meals in multiple countries or cities, use the individual “Breakfast”, “Lunch”, etc. meal tiles. For meals within Canada, enter the province rather than a city.</p> <p><b>Add to Preview Button:</b> When all the fields have been completed, click the Add to Preview button to have the wizard generate meals for each day as per UFV policy. The meals will be listed in the section on the right. Mark any meals that have been provided at the event, or not being claimed for, as ‘Deductible’ and then click Apply.</p>
<p><b>Supplies</b></p>		<p><b>Type of Supplies:</b> Select the best match to the type of supplies from the drop-down.</p>

## How to Set Allocations

The term 'Allocation' is used by Chrome River to specify the index or budget code that the expense will be charged to. Along with the index code, the Activity Code and Location Code must also be specified in Chrome River. If one or both of these codes are not applicable to the expense report, a default of 'NA' or 'Not Applicable' should be entered.

Allocation	
821B Financial Services Financial Services	
NA-Not Applicable	1
Not Applicable	2

+ Add Allocation   Presets   CREATE PRESET

1. *Activity Code* – there are two situations when an Activity Code would be entered. The first is when a department has made a request to Financial Services to setup an Activity Code and the code is applicable to the expense being claimed. These codes can be searched by entering the Activity Code sent to the department by Financial Services in the second box in Chrome River. The second situation is when the expense reimbursement is related to a business expense incurred by the employee, related to performing their job duties. This includes, but is not limited to:
  - Mileage
  - Per Diems
  - Meals
  - Conferences
  - Travel
  - Professional Development
  - Memberships

For these expenses, type in the name of the employee that benefited from the expense (the majority of the time, this will be the claimant). If neither of these situations apply, type 'Not Applicable'.

2. *Location Code* – Location Codes are only used by certain departments. If you are unsure if you a Location Code should be used, select Not Applicable, otherwise type in the appropriate Location Code.

## Printing an Expense Report

Chrome River allows you to retrieve a PDF copy of your expense report in a variety of styles at any time.

1. To begin, navigate to the expense report you wish to print a copy of.
2. Open the expense report so that you can see the expense line-item screen.

The screenshot displays the Chrome River interface for an expense report. The left pane shows a table with one expense line item:

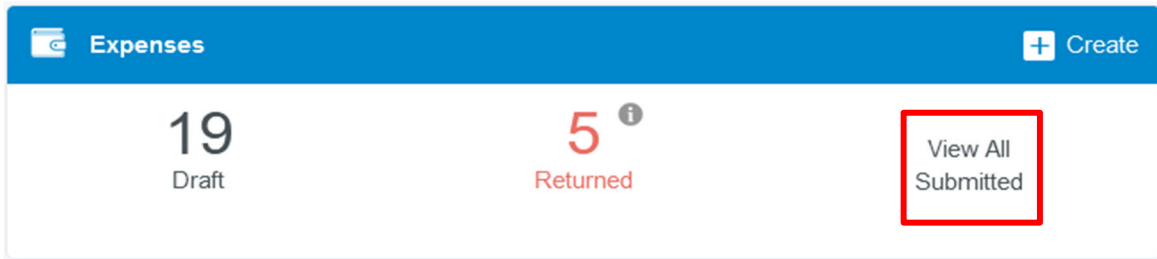
DATE	EXPENSE	SPENT	PAY ME
Fri 05/24/2024	Tuition - PD	200.00 CAD	200.00

The right pane shows the report summary for 'Higher Education Conference' with details like 'PD Expense Claim' and 'FY25'. A red box highlights the 'PDF' button in the top right of the right pane.

3. Click on the header of the expense report.
4. On the upper left-hand side of the summary screen, click on 'PDF'.
  - a. Select 'Cover Page' to get summary report of the expense report.
  - b. Select 'Full Report' to get a report containing both the summary page, as well as a page with detailed information about each line item.
  - c. Select 'Full Report with Notes and Receipts' to get all the above along with any comments and receipts attached to the expense report.
  - d. Select 'Full Report with Receipts' to get the full report mentioned above plus attached receipts, foregoing any comments.

## Tracking an Expense Report

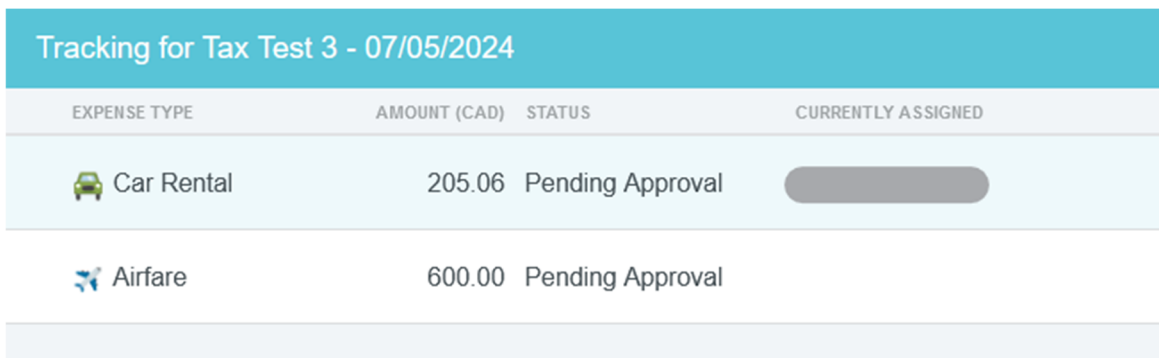
1. To track an expense report, first click on “View All Submitted” in the Expenses section. This will show you all the expense reports that have been submitted for approval by the Spending Authority.





From the list of expenses shown, select the expense report you wish to track.

2. In the upper left corner of the section on the right, click the 'Tracking' button. If you do not see a tracking button there, zoom out of the page using the zoom functionality of your browser or click the 3-dot menu icon.

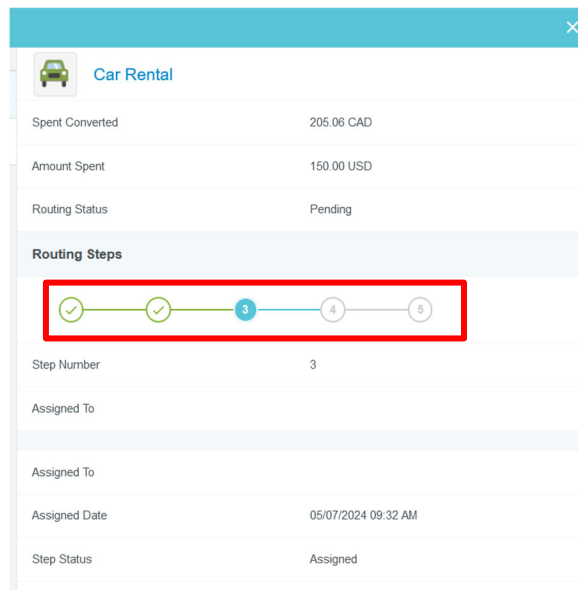
On the tracking screen, click the individual line item which you would like to see tracking for.



The screenshot shows the 'Tracking for Tax Test 3 - 07/05/2024' screen. It features a table with the following columns: 'EXPENSE TYPE', 'AMOUNT (CAD)', 'STATUS', and 'CURRENTLY ASSIGNED'. There are two rows of data:

EXPENSE TYPE	AMOUNT (CAD)	STATUS	CURRENTLY ASSIGNED
 Car Rental	205.06	Pending Approval	<input type="checkbox"/>
 Airfare	600.00	Pending Approval	<input type="checkbox"/>

3. Use the tracking menu on the right to see information about each stage of the tracking, including who it has been sent to for approval.

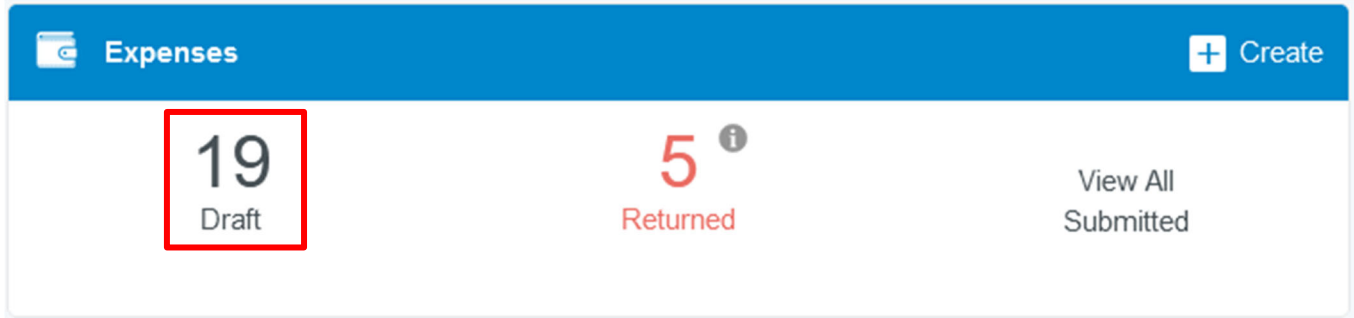




Once a claim has a tracking status of 'APReview', the claim is now in the queue for Accounts Payable to review. If there are any errors or clarification required, it may be sent back to you.

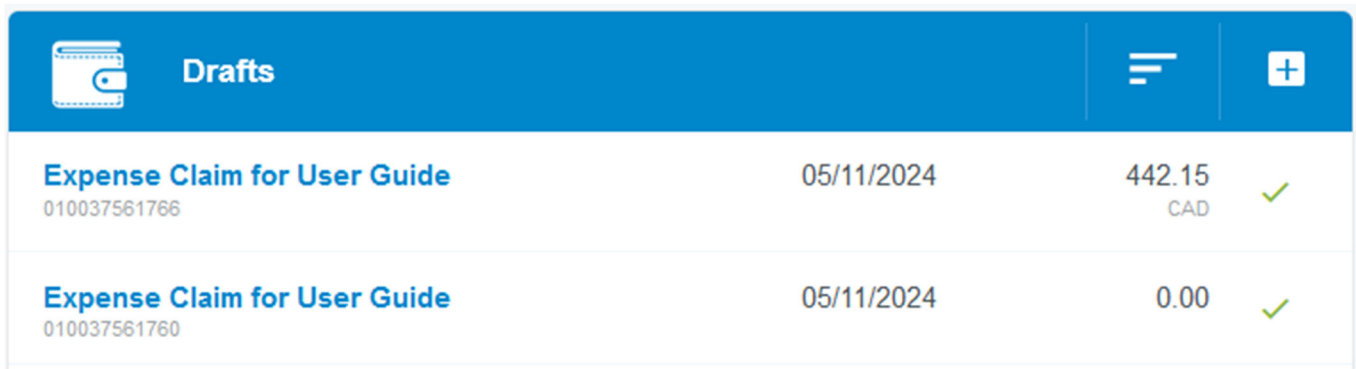
## Continuing a Draft Expense Report

1. On the Chrome River dashboard, click the 'Draft' link to be taken to a list of all your draft expense reports.



The screenshot shows the 'Expenses' dashboard. The top navigation bar is blue and contains the word 'Expenses' on the left and a '+ Create' button on the right. Below this bar, the dashboard is divided into three main sections. The first section on the left shows the number '19' in a large font, with the word 'Draft' underneath it; this entire section is enclosed in a red rectangular box. The middle section shows the number '5' in a large red font, with the word 'Returned' underneath it and a small information icon to the right. The third section on the right shows the text 'View All Submitted'.

2. From the draft list, select the expense report you wish to continue.



The screenshot shows the 'Drafts' list. The top navigation bar is blue and contains the word 'Drafts' on the left, a menu icon in the center, and a '+ Create' button on the right. Below this bar, there is a table with two rows of draft expense reports. Each row contains the following information: the title 'Expense Claim for User Guide', a unique identifier (010037561766 and 010037561760), the date '05/11/2024', the amount (442.15 CAD and 0.00), and a green checkmark indicating the status.

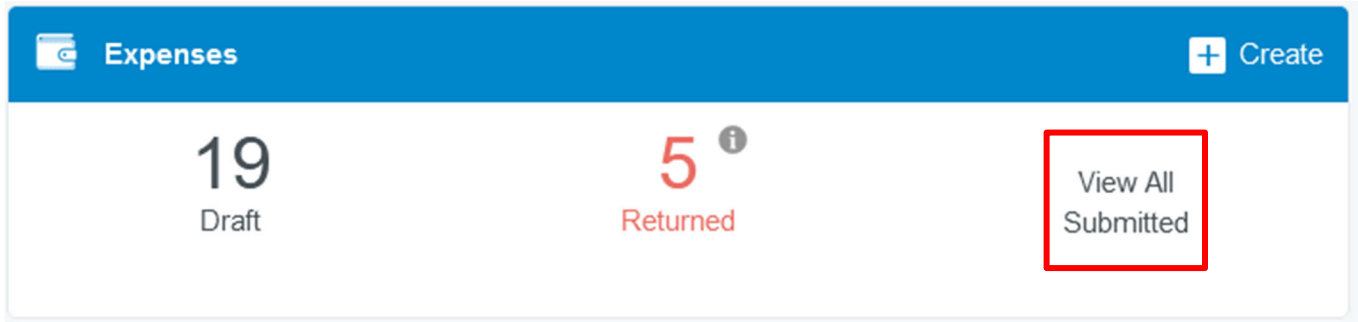
Expense Claim for User Guide	05/11/2024	442.15 CAD	✓
010037561766			
Expense Claim for User Guide	05/11/2024	0.00	✓
010037561760			

3. The selected expense report will be displayed in the section on the right. To edit the contents of the draft, click on 'Open' in the upper left-hand corner or click 'Submit' to submit it without editing.

## Recalling an Expense Report

Recalling an expense report returns it to draft status and allows it to be edited again. This is useful if changes need to be made after a report has been submitted. However, reports cannot be recalled if they have already been approved by an AP Reviewer and entered into Banner.

1. To recall an expense report, first click on “View All Submitted” in the Expenses section. This will show you all the expense reports that have already been submitted.



2. Select the expense report to be recalled by clicking on it.

Open Delete PDF Submit

### Expense Claim for User Guide

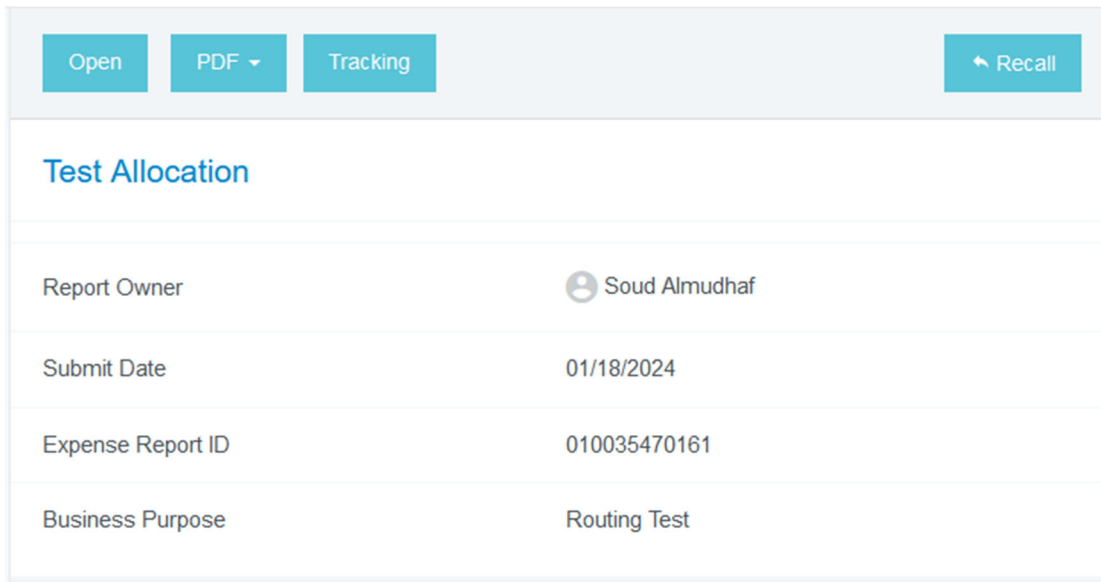
Report Owner: Soud Almudhaf

Expense Report ID: 010037561766

Business Purpose: Test

Financial Summary		
	AMOUNT (CAD)	APPROVED (CAD)
Total Expense Reported	442.15	0.00
Amount Due Employee	442.15	0.00

3. Click the 'Recall' button on the top-right side of the page.



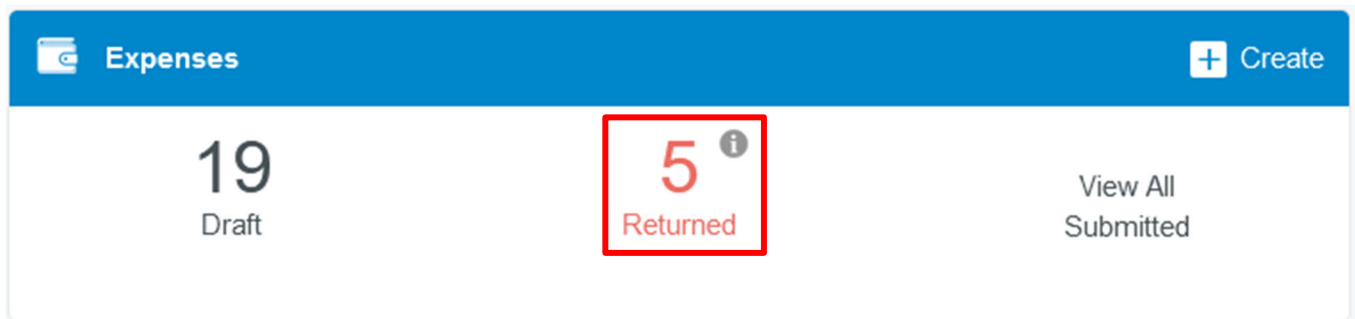
The screenshot shows a form titled "Test Allocation" with a header bar containing buttons for "Open", "PDF", "Tracking", and "Recall". The form fields are as follows:

Report Owner	Soud Almudhaf
Submit Date	01/18/2024
Expense Report ID	010035470161
Business Purpose	Routing Test

4. The expense report will be moved to your draft list. Follow the steps in the section above to edit and re-submit the expense report.

## Amending a Returned Expense Report

1. On the dashboard, click on the 'Returned' section under the Expenses heading.



The screenshot shows the "Expenses" dashboard with a blue header bar containing a "Create" button. Below the header, there are three main sections: "19 Draft", "5 Returned" (highlighted with a red box), and "View All Submitted".

2. Select the expense report you wish to amend and click 'Open'.
3. On the summary page on the right of the screen there will be a comment under the 'Comments' section.
4. Make the changes needed, based on the comment the report was returned with, and then re-submit the report.

## Notifications

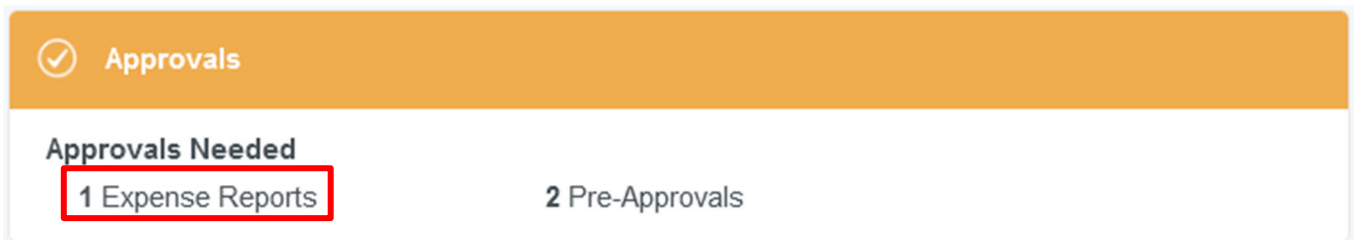
The table below shows common notification triggers in Chrome River:

Role	Will Receive	When
Submitters	E-mail Notifications	On approval of expense report On return of expense report On processing error
Approvers	E-mail Notifications	On receipt of a new claim On recalled expense report On processing error (post approval)

## Approving an Expense Report

Approvers will receive email notifications when expense reports have been submitted for their approval.

1. On the dashboard, in the approvals section, click on 'Expense Reports' to see the list of expense reports awaiting approval.



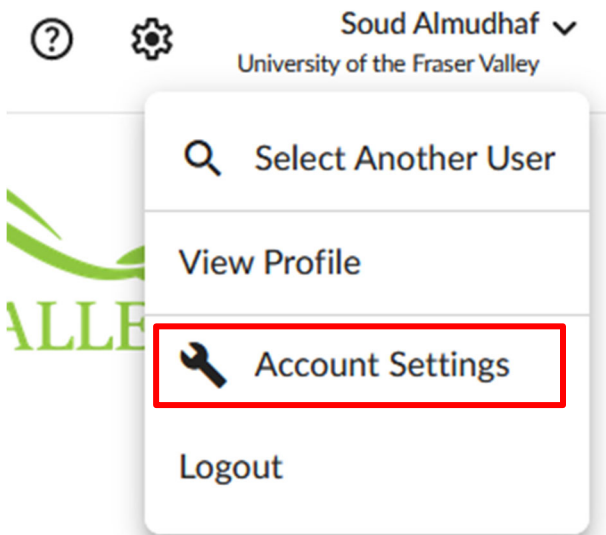
2. Select the expense report you wish to approve from the list.
3. To view details about each expense line item, click 'Open'. You will be able to approve from the line-item view as well.
4. If everything looks good, click on 'Approve'. If the expense report has errors that need correcting, either return the expense report to the submitter by clicking 'Return' or click on the line item requiring correction and then click 'Adjust'. In either case, a comment is mandatory for these actions.
5. The reconcile button allows you to mark line items as reviewed, to help keep track in expense reports with many line items.

**Note:** When performing adjustments amounts cannot be increased, only decreased. If an amount needs to be increased, the expense report must be returned to allow the employee to update the amount being claimed.

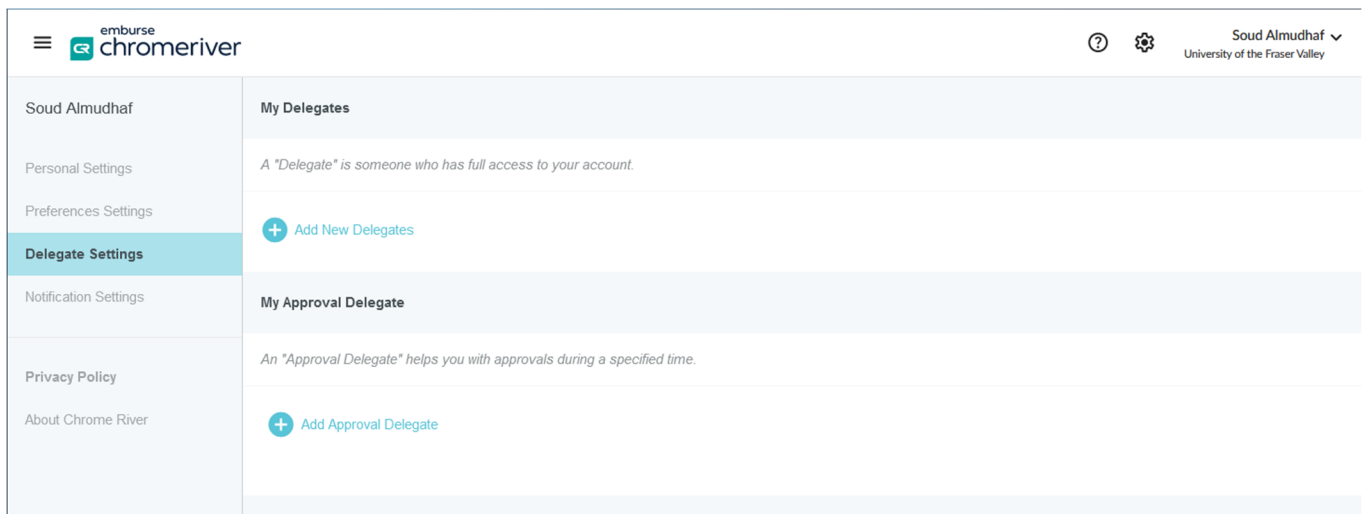
## Setting up Delegates in Chrome River

Delegates are users that can be assigned to perform actions in Chrome River on your behalf. This is useful for when you are unavailable to submit or approve reports. There are two types of delegates – standard Delegates, which can submit expense reports on your behalf and Approval Delegates, which can approve on your behalf if you are an approver. Any reports submitted on your behalf by delegates will automatically route to you for approval first.

1. To set up a delegate, click on your username in the topmost right corner of the screen. In the menu that unfurls, select 'Account Settings'.



2. On the menu on the left, select 'Delegate Settings'.



3. Click the 'Add New Delegate' or 'Add Approval Delegate' button in either 'My Delegates' for standard delegates, or 'My Approval Delegates' for approval delegates.

4. Search Chrome River for a user to set as a delegate.

**Note:** Approval Delegates must be given a start and end date. After the end date they will be automatically removed from being a delegate. You can only have one approval delegate set up at a time.

5. To remove a delegate, navigate back to the delegate setup screen and click the 'X' button next to the name of the delegate you wish to remove.

## Acting as a Delegate in Chrome River

Depending on the delegate role you were given, to act as a delegate for another user:

6. Login to Chrome River and click on your username in the top-most right hand corner of the screen.
7. From the menu that unfurls, select the name of the user that you want to act as a delegate for. Only names of users that have set you as their delegate will appear in the menu.
8. Your screen will change to that of the selected user.
9. Submit, approve, return or adjust expense reports as per your delegate role.
10. When you want to switch back to your own account, open the username menu and select your own name. Your screen will change back to your own account.

## PD / DTA Expenses

The process for applying for Professional Development (PD) funds will remain the same. Applications are to be submitted to your supervisor via PDF for approval and then forwarded to the in-service PD e-mail address ([in-service\\_pd@ufv.ca](mailto:in-service_pd@ufv.ca)). The submission of expenses reports for approved PD activities will now be through Chrome River, following a similar process as general Expense Reports. On receipt of the PD number from an approved application, expenses can be entered into Chrome River.

DTA will transition in full to Chrome River - the DTA expense report will replace the application form. To request use of your DTA funds, simply submit an expense report through Chrome River.

**Note:** Advances are to be requested using the current process of filling in an Advance Request Form and attaching it to your PD application.

There will be no change to PD and DTA balances / allocations – PD and DTA allocation amounts are determined by the Collective Bargaining Agreement. Please refer to <https://www.ufv.ca/media/assets/human-resources/publications/UFV-collective-agreement.pdf> for further details on how this is calculated.

**Note:** More information - <https://www.ufv.ca/hr/learning-and-development/professional-development-fund/>. For questions regarding remaining balances, please contact [in-service\\_pd@ufv.ca](mailto:in-service_pd@ufv.ca).

PD and DTA expense reports are to be entered into Chrome River as described in the guide below:

To create a Professional Development expense claim:

1. Follow the process shown above in the Creating an Expense Report section to log into Chrome River and create a new expense report.
2. On the expense header, enter the name provided on your approved PD application as the report name. If you have requested to use both PD and DTA funds for an activity, use 'PD Expense Claim'.



### Expenses For Soud Almudhaf

Import from Pre-Approval  
Optional

IMPORT PRE-APPROVAL

Report Name

Higher Education Conference

Expense Report Type

PD Expense Claim

PD Approval Number

25-1-1234

Fiscal Year

FY25

3. Enter your PD Approval Number correctly in the PD Approval Number field. If you have requested funds from future fiscal years and were given two PD numbers, ensure you enter them both, separated by a comma.
4. Once the header is complete, follow the steps above to add expenses to your expense report.
5. For the fields 'Location'
6. Once all expenses have been added to the report, click Submit to submit it for approval.
7. For conferences, workshops, courses, and trainings, after the expense report has been submitted, e-mail your post-PD report to [in-service\\_pd@ufv.ca](mailto:in-service_pd@ufv.ca) within 10 days of the event.

**Note:** PD Funds utilized will be updated on MyUFV once the expense reports are approved.

**Note:** The approval flow for PD and DTA expenses is as follows – the Spending Authority of the Allocation selected for the line item, the PD Reviewer, the PD Approver and finally an AP Approver.

To create a Development and Training Allowance expense claim:

1. Follow the process shown above in the Creating an Expense Report section to log into Chrome River and then create a new expense report.
2. On the expense header, enter a name for the expense report and select DTA Claim.

The screenshot shows a web form titled "Expenses For Soud Almudhaf". It has four main sections:

- Import from Pre-Approval** (Optional): A button labeled "IMPORT PRE-APPROVAL".
- Report Name**: A text input field containing "Internet Expenses".
- Expense Report Type**: A dropdown menu with "DTA Claim" selected.
- Fiscal Year**: A dropdown menu with "FY25" selected.


**Note:** Do not use the DTA Expense type for PD Expenses utilizing all or a portion of DTA funds. This expense type is for DTA activities only.

3. Once the header is complete, follow the steps above to add expenses to your expense report.
4. For Research Expenses, a letter of approval from the Research Office is required to be attached to the expense report.
5. Once all expenses have been added to the report, click Submit to submit it for approval.

**Note:** If you are expensing a computer purchase, note that the expense will be rejected if less than 3 years have passed since the previous computer expense was submitted.



The table below details the unique fields that can be found on certain PD and DTA expense tiles:

<p>Miscellaneous - PD</p>	 The image shows a square tile icon with a white background and a dark border. At the top center, there is a logo consisting of a red triangle pointing upwards, a yellow square to its left, and a blue circle to its right. Below the logo, the text "MISCELLANEOUS - PD" is written in a light gray, sans-serif font.	<p><b>Misc Expense:</b> Select 'Miscellaneous Other' for this field.</p>
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