Updated by Alexa S. Lambert 1-30-20

This Quick Reference Guide is for use after initial viewing of BPCC's Chrome River Self Study Pre-Approvals PowerPoint (on All-Campus e-mail or request from travel@bpcc.edu) and the Chrome River Blanket Travel Pre-Approvals pdf (on the Finance web page). Type 'Finance Forms' in the search bar on the BPCC home page, scroll down to 'Travel Forms' section.

PRE-APPROVAL HEADER:

Log on to LoLA and then scroll down to 'Other System Links' section for the 'Chrome River Expense' link.

Click New in Header and choose 'New Pre-Approval'

Enter a Report Name using Conference or Training Name, date of travel, & City, State (Ex: EDGAR Training, 3/28/20, Baton Rouge, LA)

Enter Start and End dates of travel--If entering multiple locations, the first start and end dates listed should include entire trip, or you will get an error message. The start and end date of the second location should reflect the start and end at that location.

Number of Days of travel is auto calculated

Payment made will default to US Dollars

Business Purpose is required. Enter enough information so that your supervisor and other approvers are likely to approve the professional development requested.

Location-- drop down has two choices: In-State or Out-of-State. Choose as appropriate.

Travel Type–choose from drop down list (if you are unsure which category to choose, contact Finance, as these choices drive the account code used on the expense report)

Official Domicile = City and State of campus where traveler works

Destination = City and State to which travel is taken

May add multiple Destinations

Allocation- begin typing the fund in the cell to the right. An auto-list of all the possible Fund/Org combinations will pop up. Choose the appropriate Fund/Org

The 2nd Allocation box is for Activity codes; if no Activity code needed, choose the 1-NA. NOTE: THIS MUST BE ENTERED TO AVOID AN ERROR MESSAGE WHEN ENTERING THE RELATED EXPENSE REPORT.

There is an option to add another Allocation for split coding of your travel expense. Use the '+Add Allocation' button to enter info for a second Fund/Org allocation. You must also enter a percentage to split the two allocations. The percentages need to add up to 100%.

Review your header information, then click Save to proceed.

Enter info for each expense category requiring payment by the college or reimbursement to the traveler. If no categories within a link are required, no info should be entered. Within each expense category the preparer must choose whether the expense will be paid by the college or reimbursed to the traveler in the 'How will this expense be paid?' drop down.

Review PPM49 for each category of expense anticipated. PPM49 can be downloaded from the Finance department (Finance Forms) page by clicking the 'Travel Guide' link on the left side of the page, which opens the State of LA -Division of Administration page with links to PPM49, SHORTS, Hotel Planner, and much more. Also review the addendums to current year PPM49 for any changes.

ADDING LINE ITEMS:

'**Air Travel**' -- There is a separate link for each of the following categories. Only enter info for applicable categories. The others may be by-passed with no info entered.

- Airfare--SHORTS estimates are required, as well as uploaded supporting documentation of the estimates.
- Baggage fees--the first checked bag only each way is reimbursable. If an additional bag is necessary for bringing any presentation material, please use the description box to explain.
- Change ticket fees--requires an explanation in the description box
- Airfare Baggage tips (see PPM49 for allowed tips)
- Note that 'Parking and Tolls' is under a separate category and link. No Parking expense should be entered under 'Air Travel'.

Save each link in which you input information.

The **'Ground Transportation'** link includes Car Rental, Car Rental Fuel, Bus/Subway/Rail, Shuttle/Limo/Taxi, Personal Vehicle Mileage, and State Car categories.

The Personal Vehicle Mileage requires use of the Calculator and then the input of a deduction for the 99-mile limitation per round trip.

The **'Hotel'** link includes Lodging and Other (Taxes, Tips, Parking, etc) categories.

Lodging --Use only the base nightly rate in calculating the Lodging expense. Traveler must use the Calculator to establish the PPM49 allowed amount, and then enter the Estimated Amount based on the conference rate or quoted information available. If entering a conference rate, be sure to check the 'Conference hotel' box on this page. If not a conference, the hotel actual cost must not exceed the allowed rates per PPM49. **Add a note in description box (see Power Point-Hotel section for more details) for Finance to know if traveler or CBA Travel Arranger will make the hotel reservation.

Other (Taxes,Tips,Parking,etc.)—use for estimated hotel taxes (should not include LA state sales tax, but do include all other taxes), Hotel tips in and out, Hotel Parking. Enter enough detail to itemize each.

*If hotel taxes will be on CBA (paid by College) and the tips and parking paid by traveler and reimbursed, then the taxes would need to be on a separate entry from the tips and parking.

The **'Meals'** link includes Per Diem Wizard, Business Meals(Special Meals), Group Meals, and Meal(for Actuals) categories. Only the Per Diem Wizard should be used by BPCC travelers.

When using the meals wizard, it is the traveler's responsibility to deduct the meals covered by the conference registration.

Enter the Start date and time of departure and End date and time of arrival for the entire trip on the first entry requested. Days field auto-calculates. Enter description (if conference provides lunch, this is a good place to note it. This description will also populate each of the sub-entries that will be created with the allowed amounts per PPM49. Each will need editing to remove any meals provided by conference.

Enter Location. The GL_ACCT and CC will default from the header page of the pre-approval form.

Look for the 'Add Entries' button at the bottom left. Click on it to create the daily meals records (sub-entries mentioned above).

NOTE: If you don't see the 'Add Entries' button, you may be in 'full screen' mode. Change to a minimized screen setting and you should see it.

Edit each of the daily meal records, as needed, by clicking on the name (not on the X-which will delete the record) and then clicking in the box next to meals to be deducted because they are provided by conference. Once these boxes are checked, click on the 'Add to Report' button at bottom right of screen.

The **'Conference and Seminar Fees'** link only has the one expense category, so it opens to a form. Enter the Estimated Registration Fee amount, a Description (ex: Conference Name -Reg Fee) and answer the 'How will this expense be paid' question (College Directly, if it will be charged to the College's CBA account or Traveler, if you are paying and will be reimbursed). Click the 'Save' button when complete.

You will need to have a scan of the agenda, published conference fact sheet showing registration fee, any membership information needed to register, any preconference selections that need to be made. You will be asked to attach these documents after you click the 'SUBMIT' button.

The **'Miscellaneous Travel'** link includes Passport/Visa Fee, Telecom, and Miscellaneous Other categories. This link should only be used upon advisement from Finance.

To **SUBMIT** the Pre-Approval form

Review Ken Roush's training video in the BPCC Chrome River Self Study Pre-Approvals PowerPoint. Ken will explain not only how to submit, but also share a few errors you might incur and how to fix them.

After a thorough review of the information input in the pre-approval form, you will click the 'SUBMIT' button.

A screen will pop up with an acknowledgement statement, to which you must agree before clicking the 'SUBMIT' button a second time. Before you click Submit a second time, scroll down to the bottom and click the 'Upload Attachments' button to add your backup documents, if you have not already done so.

Once you agree and Submit, you will get a message if there are any errors. These will need to be resolved before you can proceed. If no errors, the pre-approval document will disappear from the list on current screen and move from the 'Draft' folder to the 'Submitted' folder on the Pre-Approval line.

You can track the status of your Pre-Approval by clicking on the 'Submitted' area on the pre-approval line and then click on the Pre-Approval in question. A screen will pull up to the right. Click on the 'Tracking' button to view where the document is in the approval process. You may also use the 'PDF' button to choose to print either the Pre-Approval document alone (Full Report) or the Pre-Approval with all receipts (Full Report with Receipts).

If you find that you have made an error on a portion of your report, you may also use the 'Recall' button to stop the approval process and put the document back in the Draft status, so you can edit it.

Once an approver has approved, the only way to recall it is to have another approver disapprove it. If it goes through the entire approval process and needs editing, you may have to start all over by using the 'Duplicate' button and then use the 'Expire' button to make the old incorrect document ineligible for applying expense to it later.

NOTE: If your screen times out or you want to complete a pre-approval that you started earlier, click on the word 'CHROMERIVER' in the title bar, then click on the 'Draft' on the pre-approval line, choose the pre-approval you want to continue or edit, click the 'OPEN' button on the screen to the right. If the header needs editing, click 'Edit' to proceed. Remember to click 'Save' on each page that is edited. Click on any Expense item on the left that needs editing and repeat the process. If you need to add, click on the big PLUS + sign on the top right of the left screen and choose which link and expense category you need to add.

NOTE: If you have trouble finding the place to add attachments, one option is to click on the small 'attachments' icon on the left side of screen just under the Pre-Approval Report name. The screen on the right will likely change. Scroll down to bottom right to see the 'Upload Attachments' button.