



TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER™
EL PASO



TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER.[™]
EL PASO

CHROMERIVER

Payment Services



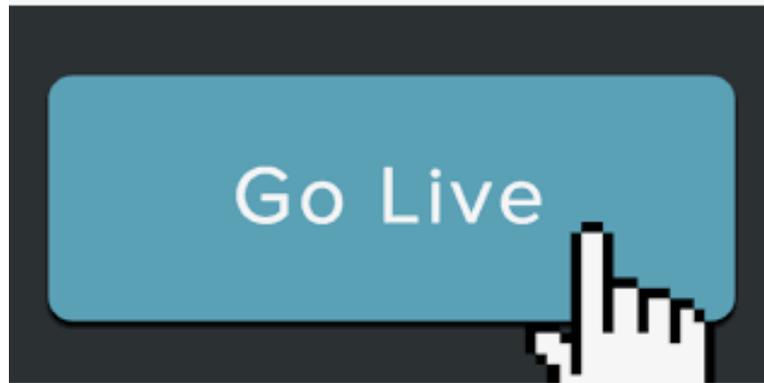
Training Agenda

- What is Chrome River?
- CR Highlights
- Getting Started with CR
 - Navigating
 - Delegate Assignment
 - Expense Tiles
- How to create and submit an Expense Report
- Expense Report Routing and Tracking
- Expense Report Approval



Chrome River-PCard

Chrome River is HSCEP's new expense management system for PCard reconciliation that went live on January 4, 2021. The new system replaces Citibank GCMS and will enhance and simplify the PCard processes. No more Citibank portal!





Chrome River-Pcard Highlights

- Single sign-on
 - All employees with eRaider, can log into Chrome River. No password reset or security questions.
- Paperless
 - No more printing reports and attaching paper receipts.
 - Supporting documentation will be uploaded to the system.
- Electronic routing
 - Reports will be routed for budget check, supervisor approval, and the PCard office for final review.
 - Say good-bye to inter-departmental mail and hello to efficiency.



How will the system work?

- Automatic Citibank transaction feeds (daily)
 - All PCard transactions will automatically feed to the Cardholders Chrome River eWallet for reconciliation, 1-3 days after the posting date.
- Electronic Receipts Uploads
 - All dashboards include a Receipt Gallery for documentation storage and potential mapping to feed credit card transactions.
- Electronic Expense Report
 - New expense reports can be created electronically for transactions pending reconciliation.
 - Expense Report should be submitted weekly.
- Allocations
 - All valid FOP combinations from Banner will be available for use in Chrome River
 - Multiple FOP combinations can be applied to a single transaction.
 - Compliance rules have been created for restricted fund source to ensure the FOP is allowed to be utilized for the allowable expense.
- Electronic Approval Routing
 - PCardholders and delegates can be easily track routing for all expense report submissions.



Getting Started with Chrome River

Category	Count	Status	Timeframe
APPROVALS	1	Expense Reports	
	3	Pre-Approvals	
EXPENSES	7	Draft	
	0	Returned	
	1	Submitted	Last 90 Days
PRE-APPROVAL	3	Draft	
	1	Returned	
	0	Submitted	Last 90 days

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As part of the university's efforts to go green, we are very excited to introduce the new Texas Tech University Health Sciences Center El Paso reconciliation system, Chrome River!

Chrome River benefits include:

- Electronic submittal of PCard expense reports
- Receipts may be scanned to the tool or a picture uploaded from your mobile device (submitted and approved electronically)
- Secure online paperless environment
- Approved expense reports from anywhere using your laptop, tablet, or mobile device
- Monitor the status of the reimbursement process from your computer

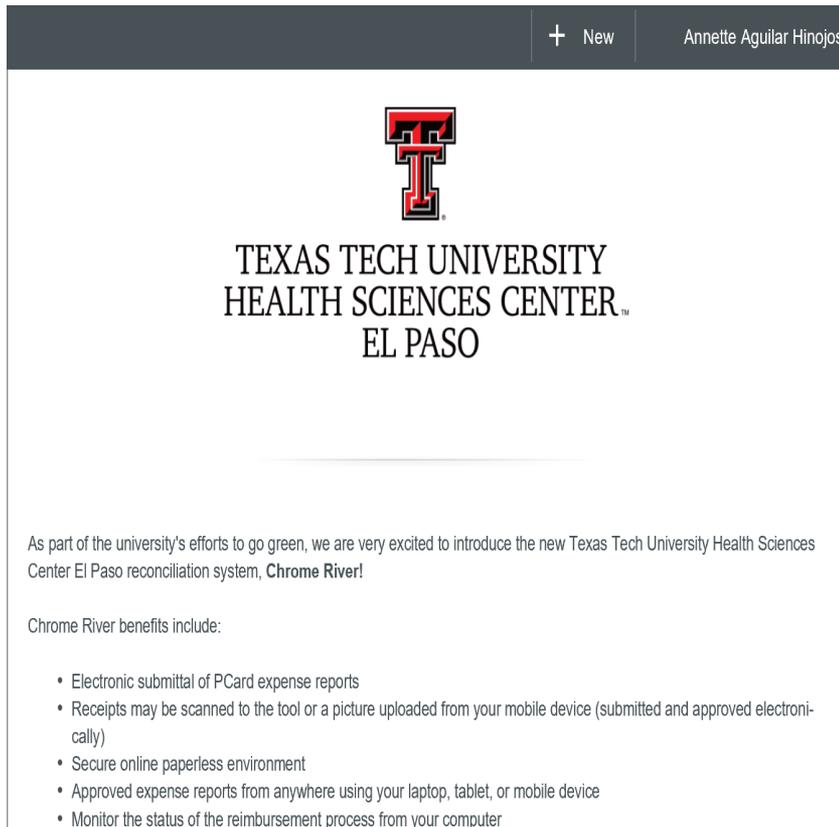
CONTACT INFORMATION

For PCard expense management and processing assistance, please contact:

PCard	Teresa Ruiz-Hurtado	915-215-4948	PCardELP@ttuhsc.edu
PCard	Adriana Vasquez	915-215-4591	PCardELP@ttuhsc.edu



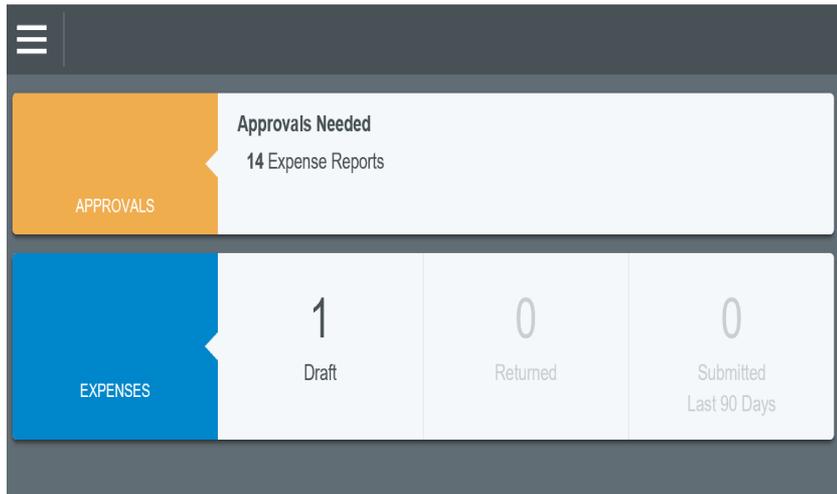
Welcome Page

A screenshot of a web application's welcome page. At the top, there is a dark grey header bar with a '+ New' button and a user icon labeled 'Annette Aguilar Hinojos'. Below the header, the Texas Tech University logo is centered, followed by the text 'TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER™ EL PASO'. A horizontal line separates the header from the main content. The main content area contains a paragraph of text: 'As part of the university's efforts to go green, we are very excited to introduce the new Texas Tech University Health Sciences Center El Paso reconciliation system, Chrome River!'. Below this, it says 'Chrome River benefits include:' followed by a bulleted list of five items: 'Electronic submittal of PCard expense reports', 'Receipts may be scanned to the tool or a picture uploaded from your mobile device (submitted and approved electronically)', 'Secure online paperless environment', 'Approved expense reports from anywhere using your laptop, tablet, or mobile device', and 'Monitor the status of the reimbursement process from your computer'. A blue arrow points from the user icon in the header to the first bullet point in the list on the right.

- User icon provides access to other authorized accounts, Settings, and Help
- Contact Information
- Deadlines
- Upcoming Training
- Special Announcements
- Links to Policies and Forms
- Links to Training Videos



Dashboard



Snapshot of Recent Activity

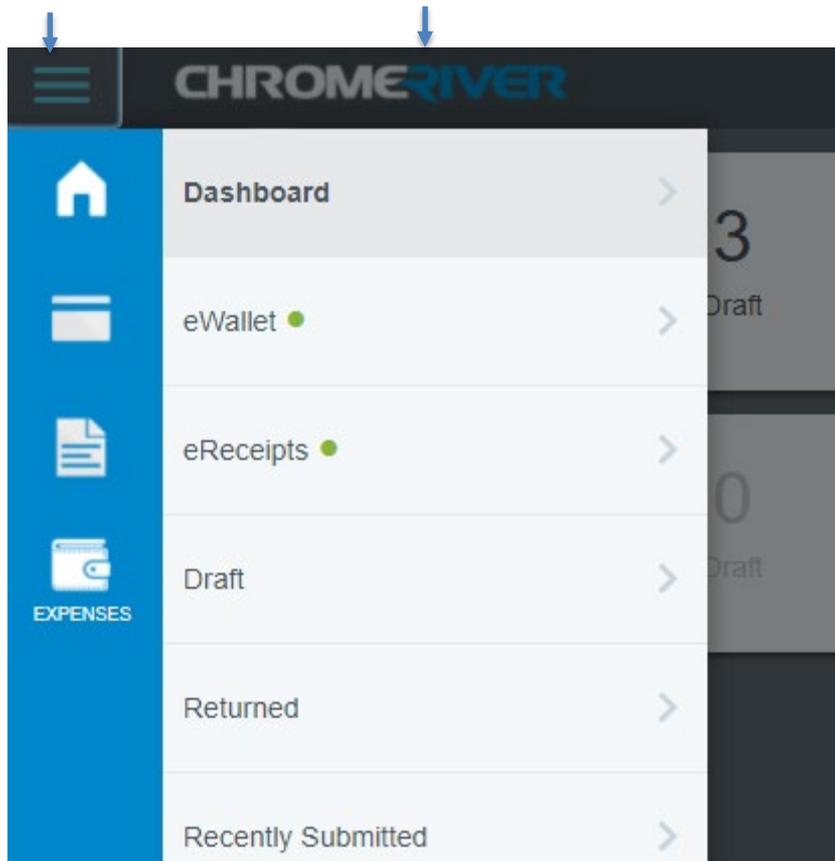
- Approval Bar – Will appear if user has items pending approval
- Expense Report Bar – Drafts, Returned, Submitted last 90 days



Navigating through Chrome River

Menu Button

Chrome River Icon will take you to the home page



- **eWallet** – you will find all your credit card transactions directly feeding from Citibank.
- **eReceipts** – receipts you have saved or downloaded into your profile.
 - Save using dollar amount and vendor, e.g. 250.00Amazon



Delegate Types

Delegate (Reconciler):

- Create PCardholder's expense reports (need access to the profile) on behalf of the PCardholder and access his/her settings menu, home screen and inquiry reports.
- Receive e-mails regarding rejection/adjustment to reports created for the PCardholder.
- Cannot approve expense reports on behalf of the PCardholder.

Approval Delegate:

- As a supervisor/approver you can temporarily grant another user to approve on your behalf.
 - Gives temporary approval rights during a specified period of time (system will require a "Start" and "End" date)
 - Only approve via email
 - No access to account or approval bar



Delegate (Reconciler)

- Pcardholders grant access to Delegate
- Is able to create and submit an expense report on their behalf.
- The PCardholder still retains full responsibility of ensuring that expenses are completed in a timely and accurate manner.
- Expense reports will route to the PCardholder after the delegate submits the report.
- To Assign a Delegate
 - Click on your name (top right corner)
 - Select Settings
 - Select Delegate Settings
 - Click Add New Delegate
 - Type in the name of the person you'd like to act on your behalf.

The screenshot shows the ChromeRiver user interface. At the top right, the user's name 'Guadalupe Alvara' is displayed in a dropdown menu, which is circled in blue. Below the name, there are several options: 'VIEW PROFILE', 'Last login: 11/19/2020 at 11:51 AM', 'Select Another User', 'Settings', 'System Administration', 'Help', 'Launch Walkthrough', and 'Logout'. A blue arrow points from the 'Settings' option to the 'Delegate Settings' section in the main navigation. The main navigation bar includes 'CHROME RIVER' and a list of settings: 'Personal Settings', 'Preferences Settings', 'Delegate Settings' (highlighted in blue), 'Notification Settings', and 'Privacy Policy'. On the right side, there is a 'My Delegates' section with a description: 'A "Delegate" is someone who has full access to your account.' Below this, there are two delegates listed: 'Adriana Vasquez' (Chief Analyst / R11432057 / adriana.vasquez@ttuhsc.edu) and 'Teresa Ruiz Hurtado' (Lead Analyst / R11508461 / teresa.ruiz-hurtado@ttuhsc.edu). At the bottom right, there is a '+ Add New Delegates' button, which is also highlighted with a blue arrow.



Create a New Expense Report

- **+ New**
 - New Expense Report
- **Report Name**
 - Last Name, First Initial, Cycle Month and Year, Start and End Dates (MM/DD/YY) of Transactions
- **Report Type**
 - Procurement Card
- **Start Date/End Date**
 - Time period for submission, should submit weekly and reflect the transaction posting dates (use Monday – Sunday dates)
- **Approver**
 - PCardholder Supervisor or department Fund Manager
- **Cycle Month and Fiscal Year**
- **Save**
 - Top right hand corner

Expenses For Annette Aguilar Hinojos

Report Name: Hinojos, A, Feb 2021, 01/04/21 - 01/10/21

Report Type: Procurement Card

Start Date: 01/04/2021

End Date: 01/10/2021

Chart: E

Approver: R10468133 / Fisher, Jessica / Executive Director / E

Cycle Month: Feb

Fiscal Year: FY21



Adding an Expense

The screenshot shows the CHROMERIVER mobile application interface. At the top, there is a navigation bar with a hamburger menu icon, the CHROMERIVER logo, and a '+ New' button next to the user's name, Annette Aguilar Hinojos. Below the navigation bar, the screen displays 'Expenses For Annette Aguilar Hinojos' and a date range 'Hinojos, A, Sept., 09/04/20-09/11/20'. A blue arrow points to a '+' button in the top right corner of the main content area. On the left side, there is a sidebar menu with options: 'All', 'Trips', 'Online', and 'Credit Card'. The 'Credit Card' option is circled in blue. The main content area shows a list of transactions. The first transaction is 'Chart E - PCard Other' with a date of '08/19/2020' and a value of '850.00 USD'. This transaction is circled in blue. Below the transaction list, there are several expense category tiles: 'FOOD AND ENTERTAINMENT', 'DUES / FEES', 'PROFESSIONAL DEVELOPMENT', 'OPERATING EXPENSES', 'MISCELLANEOUS', and 'ITEMIZATION'.

- Select the + Button to add a new expense
- Click on **Credit Card**
- Select the credit card transaction you want to add to your report
- Select the Expense Tile

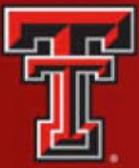


Adding an Expense

After locating the appropriate expense tile, enter the information required.

- Form information requirements can vary by expense type, but all forms will require the following:
 - Date & Spent**—verified by the fed transaction
 - Description**—provide detailed description of transaction and justification/benefit to institution
 - Allocation**—all valid FOP combinations are available for application to the expense; multiple allocations can be added to a single expense by clicking the **Add** allocation button.
 - Receipt**—can be uploaded directly from your computer to the line item or the Receipt Gallery can be utilized.
- When the requirements have been fulfilled, click **Save** and the credit card transaction will be added as a line item to the expense report

The screenshot shows a web form titled "Other Fees". At the top right, there are "Cancel" and "Save" buttons. The form has several sections: a "Date" field with a calendar icon showing "01/23/2021"; a "Spent" field with a numeric input "0.00" and a currency dropdown set to "USD"; a "Description" text area; and an "Allocation" section with a search bar labeled "Search for Fund, Org or Program".



Adding an Expense

- Continue adding transactions to the expense report that fall within time period chosen on the header level.
- When ready to submit the expense report, click the **Submit** button on the bottom of the report.
- Message below will appear. Disregard the Pre-Approval button (travel related).

A screenshot of a web application interface showing a 'Submit Confirmation' dialog box. The dialog has a green header bar with the text 'Submit Confirmation'. Below the header, there is a yellow background area containing the text: 'I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.' At the bottom right of the dialog, there are three buttons: 'Cancel' (white), 'Pre-Approval' (blue), and 'Submit' (green). The top right of the dialog shows a '+ New' button and the user name 'Guadalupe Alvara'.

- Once submitted, the report will route for approvals. It can be located in the Cardholder's dashboard for tracking purposes.



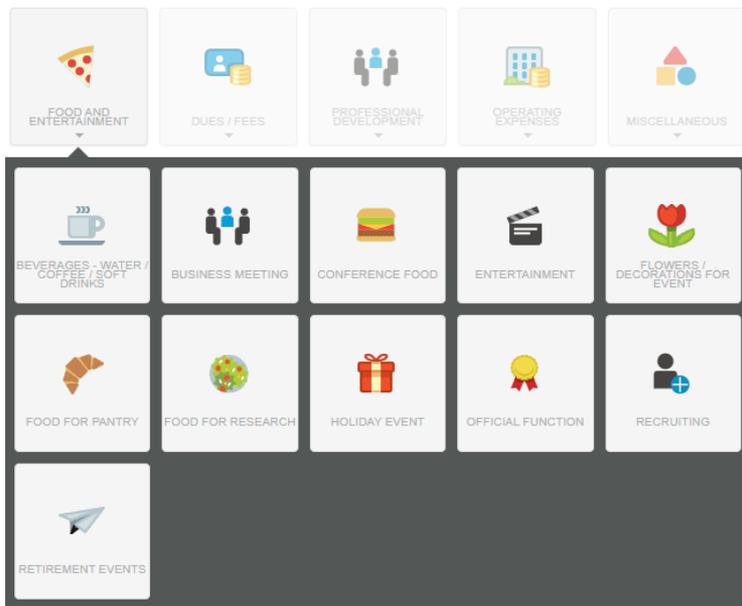
Expense Tiles

- Selecting your category is important.
 - The category determines the account code.
 - Each category contains unique fields and requires specific backup documentation.
 - Compliance rules have been created based on expense type, amount, funding, etc.
 - Example: No food and entertainment on state funds.



Expense Tiles

- Food & Entertainment



- Dues/Fees Dues





Expense Tiles

- Professional Development

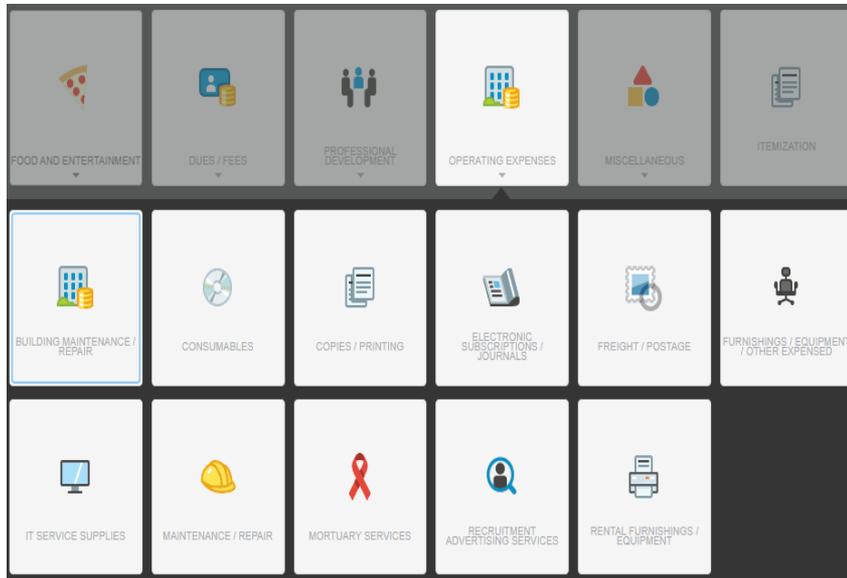
A grid of expense tiles for Professional Development. At the top, five main category tiles are shown: Food and Entertainment, Dues / Fees, Professional Development (selected), Operating Expenses, and Miscellaneous. Below the Professional Development tile, a dark grey panel contains 13 sub-tiles: Books, Certificate Exam Fees, Conference / Seminar, Continuing Education, License Fees, Publications, Reference Materials, Registration Fees, and Training / Education.

- Operating Expenses

A grid of expense tiles for Operating Expenses. At the top, five main category tiles are shown: Food and Entertainment, Dues / Fees, Professional Development, Operating Expenses (selected), and Miscellaneous. Below the Operating Expenses tile, a dark grey panel contains 14 sub-tiles: Building Maintenance / Repair, Consumables, Copies / Printing, Electronic Subscriptions / Journals, Freight / Postage, Furnishings / Equipment / Other Expensed, IT Service Supplies, Maintenance / Repair, Mortuary Services, Recruitment Advertising Services, and Rental Furnishings / Equipment.



Expense Tile - Operating Expenses



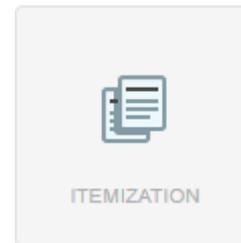
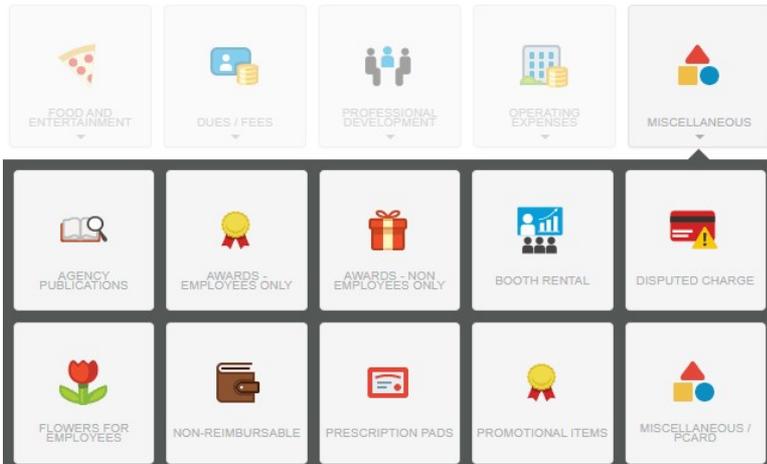
- Most categories under Operating Expenses require a deviation prior to purchase.
- Approved deviation form should be attached.



Expense Tiles

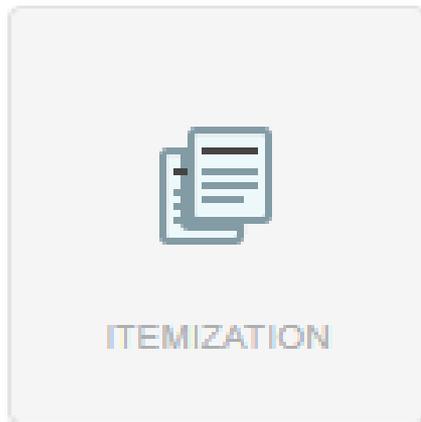
- Miscellaneous

- Itemization





Itemization



- If the credit card transaction requires allocation to multiple account codes, use the Itemization tile.
 - Membership/Registration
 - Amazon, Walmart, etc.



Compliance Rules

Compliance Rules were created to help remind PCardholders and Approvers of Operating Policies. Depending on the fields selected, a compliance rule may trigger upon submitting your report.

Examples of Compliance Rules:

- Coca-Cola products not used
- No outside guest on events
- Prohibited expense

The rule will require you to submit a justification or additional documentation. Follow the instructions per the warning given.

▲ 270E-Coca-Cola Product Not Used #270E

Provide reasonable justification for not purchasing Coca-Cola products or confirm that the appropriate product brand will be purchased in the future.

RESPONSE

Coca Cola does not have this available.

▲ 276E-Ext Guest Not Present / Confirm Pre-Approval Form is Attached #276E

A Pre-Approval Form for Official Functions, Business Meetings, and Entertainment is required. Type "Confirm" to indicate that this form is attached.

RESPONSE

confirm

▲ 288Ef-Prohibited Expense Type - Copies / Printing #288Ef

Copies/Printing are a prohibited PCard expense. Approval from Purchasing is required. Type "Deviation" to indicate the Request for PCard Deviation form is attached. If deviation not obtained, provide justification for not utilizing contracted vendors and advise why prior approval was not obtained.

RESPONSE

Deviation 



Membership Forms

Cancel Save

Membership Dues

Date: 11/20/2019

Spent: 689.00 USD

Description: Yearly membership for J. Fisher and A. Hinojos

Approved Professional Society: Texas Dental Association

Select Employee Name

Guests (2)

Internal Add Guests

Upload CSV

Internal	x	Jessica Fisher Executive Director / R10468133 / jessica.fisher@ttuhsc.edu Texas Tech University	50 %	344.50
Internal	x	Annette Aguilar Hinojos Managing Director / R11341220 / annette.a.hinojos@ttuhsc.edu Texas Tech University	50 %	344.50
			100 %	689.00

Allocation

E-183000-533511-10.FUND: EMS/Simulation Training (LOCAL) ORGN: ACLS Course Emer Med Eip / PROG: Instruction

- Description-be specific
- Approved Professional Society list is available in Chrome River
 - Print screen is no longer required to be attached.
- Select the employee(s)
- Add receipt and backup documentation
- Save



Professional Development Continuing Education

Cancel Save

Continuing Education

Date

Spent USD

Please provide the institutional benefit of this expense.

Description

Enter Travel Preapproval ID if expense is related to business trip.

Travel Pre-Approval ID

Select Employee Name

Guests (1)

Internal

Upload CSV

Internal	x	Richard C Black Academic Dean / R11503907 / richard.black@ttuhsc.edu Texas Tech University	<input type="text" value="100 %"/>	<input type="text" value="689.00"/>
			100 %	689.00

Allocation

- Description
- Travel Pre-Approval ID
 - Optional
- Select the employee(s)
- Enter allocation (FOP)
- Add receipt and backup documentation
- Save



Food & Entertainment

Cancel Save

Business Meeting

Date: 12/06/2019

Spent: 205.75 USD

Describe the business purpose of the event and its benefit to TTUHSCEP.

Description: Payment Service meeting with Chrome River Representative - Rebecca Johnson

Event Date / Location: 12/06/2019-Business Affairs 130 Val Verde

Alcohol Purchased: No Alcohol Purchased

External Guest Attended: Yes

Spouse/Partner/ Family/ Other Attended: No

Number of Attendees: 6

Add up to 10 Internal/External Attendees to the guest picker below. Full attendees list must be uploaded.

Guests (5)

Internal Add Guests

[Upload CSV](#)

- Description
- Event date/location
- Alcohol purchased
 - Section to attach approval letter
- External guest attended
- Spouse/partner/family/other attended
- Number of attendees
 - Select internal guests
 - Upload sign-in sheet of attendees
- Add receipt and documentation

F&E form is no longer required as all the questions are now being asked on this form



How to Edit Your Report

EXPENSES

7 Draft

1 Returned

0 Submitted
Last 90 Days

Draft Expense Reports			
test pcard split 010020283804	01/29/2020	150.00 USD	▲
test meals 010020346052	02/11/2020	0.00	✓
Test 010020479091	03/03/2020	0.00	✓
Test 123 010020630833	05/27/2020	1,324.75 USD	▲
test pcard chart e 06182020 010020917225	06/18/2020	477.00 USD	▲
Test 070820 010021004706	07/08/2020	0.00	✓
Test 10/20/2020 010021483570	10/12/2020	0.00	✓
Hinojos, A, Sept., 09/04/20-09/11/20 010021614402	11/03/2020	0.00	✓

Open Delete PDF

Submit

Hinojos, A, Sept., 09/04/20-09/11/20

Report Owner: Annette Aguilar Hinojos
Managing Director / R11341220 / annette.a.hinojos@ttuhsc.edu

Expense Report ID: 010021614402

- Select the report from either your Drafts or Returned items
- Highlight the Expense report
- Select **Open**
- Make necessary changes
- **SAVE**



Expense Report Routing

DATE	EXPENSE	SPENT	PAY ME
Thu 08/20/2020	Continuing Education SRA INTERNATIONAL	1,055.00 USD	0.00
Mon 08/24/2020	Conference / Seminar NCURA	105.00 USD	0.00
Tue 08/25/2020	Conference / Seminar NCURA	105.00 USD	0.00

Expense Report
010021614402

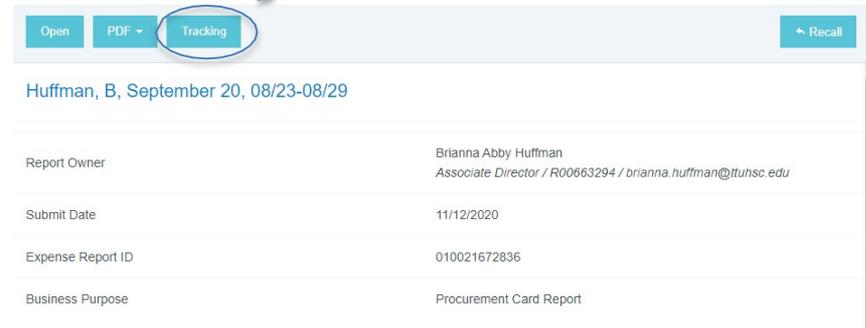
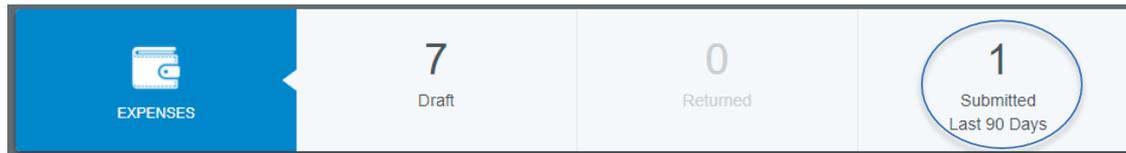
Total Pay Me Amount
0.00 USD

Submit

- Submit your PCard expense report.
- If submitted by delegate, Cardholder approval is required
- Route to Supervisor selected for approval
- Budget check is done. If line has insufficient funds, report will be returned to owner's dashboard
- Route to Pcard Office/Approver
- Once approved, exports to Banner
- Fund Manager will be notified via email of the expense once expense report is approved



Tracking your Expense Report

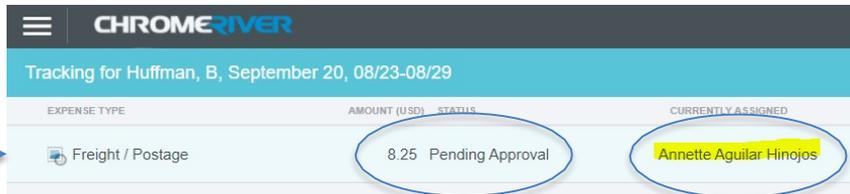


To view the status of a submitted expense report:

- Go to the Cardholder's dashboard and click on the **Submitted** option on the **EXPENSES** bar.
- Select the Expense Report you are tracking
- Click the **Tracking** button to view status

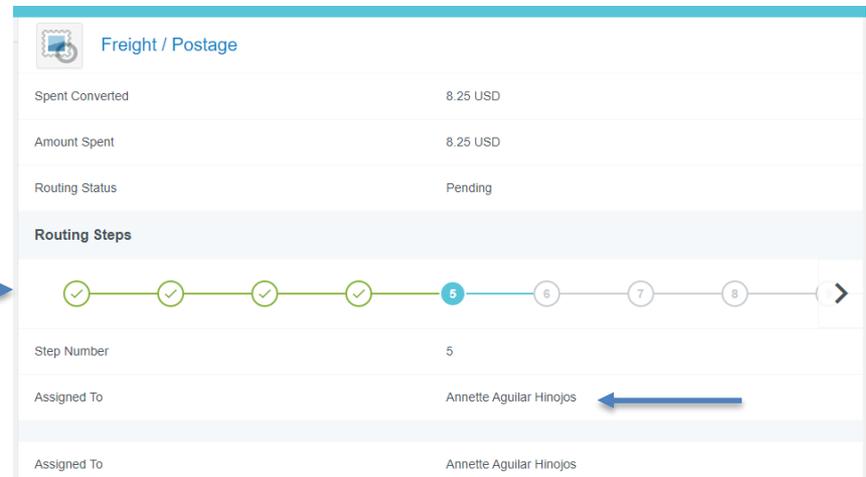


Tracking your Expense Report



Tracking for Huffman, B, September 20, 08/23-08/29

EXPENSE TYPE	AMOUNT (USD)	STATUS	CURRENTLY ASSIGNED
Freight / Postage	8.25	Pending Approval	Annette Aguilar Hinojos



Freight / Postage

Spent Converted	8.25 USD
Amount Spent	8.25 USD
Routing Status	Pending
Routing Steps	
✓ — ✓ — ✓ — ✓ — 5 — 6 — 7 — 8 — >	
Step Number	5
Assigned To	Annette Aguilar Hinojos
Assigned To	Annette Aguilar Hinojos

- Status – Provides the step in the process in which the report is currently on.
 - e.i. Pending Approval
- Currently Assigned – Supervisor/ PCard Coordinator
- Routing Steps – indicates the steps pending
 - Clicking on the number will show additional detail.



Returned Expense Report

Returned Expense Reports

Hinojos, A, Sept., 09/04/20-09/11/20 1,265.00 USD ✓

Open Delete PDF

Submit

Report Owner	Annette Aguilar Hinojos Managing Director / R11341220 / annette.a.hinojos@ttuhsc.edu
Submit Date	11/10/2020
Expense Report ID	010021614402
Business Purpose	Procurement Card Report

Comments (1)

Auto Bot (Budget Checker) 11/10/2020 11:31 AM
Returned- E--183145-203181-720300-60-- 210.00: (E_Conference / Seminar, E_Conference / Seminar) available
E--183145-203181-720100-60-- 1055.00: (E_Continuing Education) **insufficient funds for this budget**

- Select the Returned Expense Report from EXPENSES bar
- Click - **Open**
- Review Comments section for explanation as to why the expense report was returned
- Make any necessary changes
- **Submit**



Expense Report Approval

The dashboard summary bar is divided into two sections. The left section, labeled 'APPROVALS', contains a checkmark icon and the text 'Approvals Needed' with '2 Expense Reports' below it. The right section contains the text '3 Pre-Approvals'.

The screenshot shows a dashboard with a header 'Approvals Needed' and a search icon. Below the header, there are two tabs: 'Expense Reports' (selected) and 'Pre-Approvals'. A list of expense reports is displayed with checkboxes, names, dates, amounts, and status icons. A blue arrow points to the first report in the list.

Expense Reports	Pre-Approvals
<input type="checkbox"/> Hinojos, Annette Aguilar CASCADE User Conference - 2019 - CR 010019325074	07/17/2019 546.24 USD ▲
<input type="checkbox"/> Huffman, Brianna Abby Huffman, B, September 20, 08/23-08/29 010021672836	11/16/2020 128.70 USD ▲

The screenshot shows the details of an expense report. At the top, there are buttons for 'Open', 'PDF', 'Tracking', 'Return', and 'Approve'. The report title is 'Huffman, B, September 20, 08/23-08/29'. The report owner is Brianna Abby Huffman. The submit date is 11/16/2020. The expense report ID is 010021672836. The business purpose is 'Procurement Card Report'. The rule description is 'APPROVER - Route (Individual) - APPROVER - Route (Individual) - send to the Manually Selected Approver on the Report Header Chart E - Should be a Fund/Financial Manager Chart H - Should be a Fund/Financial Manager Chart S & T - Should be Org Mgr/Approver'. Below this is a table of prior approvers.

Prior Approvers	
APPROVER	DATE
Adriana Vasquez	11/16/2020
Auto Bot (Budget Checker)	11/16/2020

- Only Approvers will see **APPROVALS** on their Dashboard
- Select the Expense Report
- Open, PDF, Track, Return, or Approve



Approval - Dashboard

Expenses For
Brianna Abby Huffman

Huffman, B, September 20, 08/23-08/29

3 Comments 7 Attachments

DATE	EXPENSES	SPENT	APPROVED
Mon 08/17/2020	Awards - Non Employees Only CHOCOLAT	100.00 USD	100.00 USD
Tue 08/25/2020	Freight / Postage USPS PO 4829450105	8.25 USD	8.25 USD
Wed 08/26/2020	Freight / Postage USPS PO 4828530093	20.45 USD	20.45 USD

Awards - Non Employees Only ✓ Approve

290E-Gifts / Awards / Prizes #290E

Non-Cash Awards, Prizes, Gifts and Gift Cards Form (HSCEP OP72.03, Attachment B) is required. Gift cards are strictly prohibited and will require an immediate reimbursement. Type "Attached" to indicate form is attached.

RESPONSE
Attached.

Date: 08/17/2020

Spent: 100.00 USD

Approved: 100.00 USD

Description: Donor gifts: 1)Richard Aguilar birthday, 2) Frank Aguillo, congratulations, 3) Doriss Gurs, birthday; Brianna Huffman

Non-Employee Recipient Type: Donor

Guests (3)

External **Richard Aguilar** President ABC Corp 33.34

External **Frank Aguillo** Assistant President 33.33

Allocation

E-183099-103101-60 **FUND: Office of Development - Opr Elp (LOCAL)**
ORGN: IA Development Elp / PROG: Institutional Support

References

[Employee Non-Cash Awards, Prizes and Gifts Form](#)

Comments (0)

Add Comment Post

Attachments (5)

- Select Expense
- Expense Category
- Transaction Date
- Dollar Amount
- Description
- Guest/Employees
- Allocation-FOP
- Reference-Documentation to be included and uploaded
- Comments
- Attachments-receipt and backup documentation
- Select Next Expense



Approving by Email

ACTION REQUIRED Chrome River

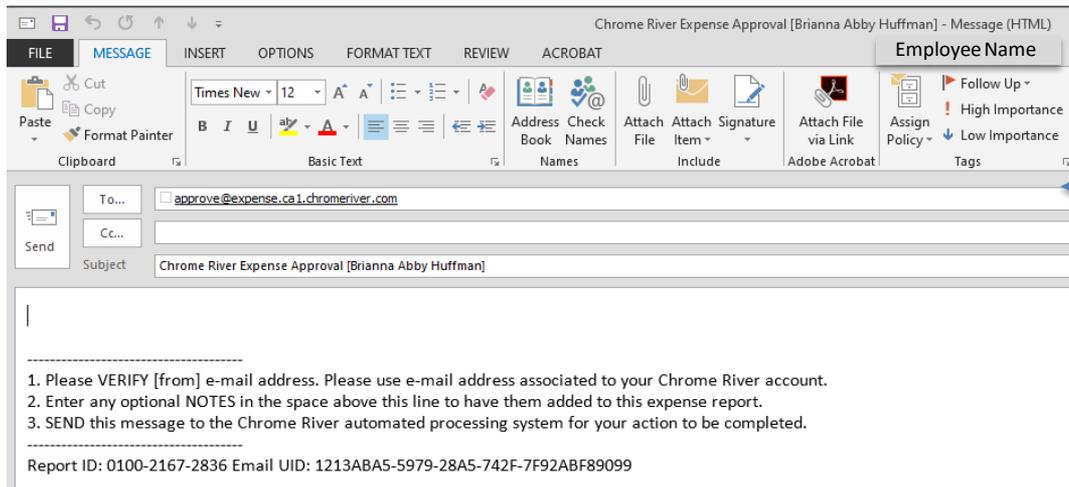
→ **ACCEPT** **RETURN**

Expense Report for	Employee Name	[Associate Director / R Number]
Created By	Adriana Vasquez	Reconciler
Report Name	Huffman, B, September 20, 08/23-08/29	
Submit Date	11/16/2020	
Expense Dates	08/17/2020 - 08/26/2020	
Total Expenses	128.70 USD	
Prior Approvers	Auto Bot (Budget Checker) [11/16/2020 GMT] Adriana Vasquez [11/16/2020 GMT]	
Start Date	08/23/2020	
End Date	08/29/2020	
APPROVER	Hinojos, Annette Aguilar / Managing Director / Payment Services Elp	
Business Purpose	Procurement Card Report	
Chart	E	
Ethos Invoice	N	
Expense Owner	R00663294	
Fiscal Year	FY21	

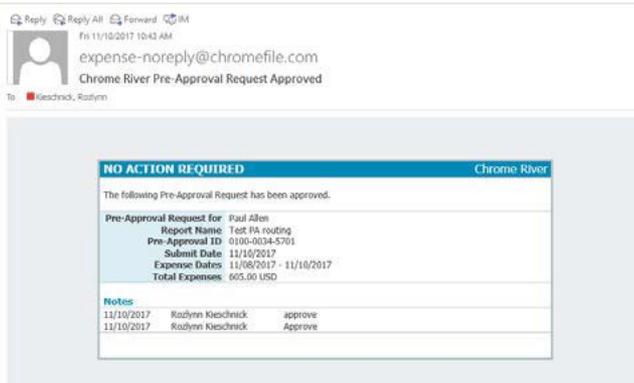
- Cardholders and Approvers in workflow will receive an Email from: **Expens-noreply@chromefile.com** when an expense report has been assigned for their approval .
- Verify expense report information such as expenses, allocation, receipts and documentation
- A link to view uploaded receipts/documentation is provided in the email.
- After reviewing, the Approver can select **“ACCEPT”** or **“RETURN”** to provide an action via email.



Approving by Email



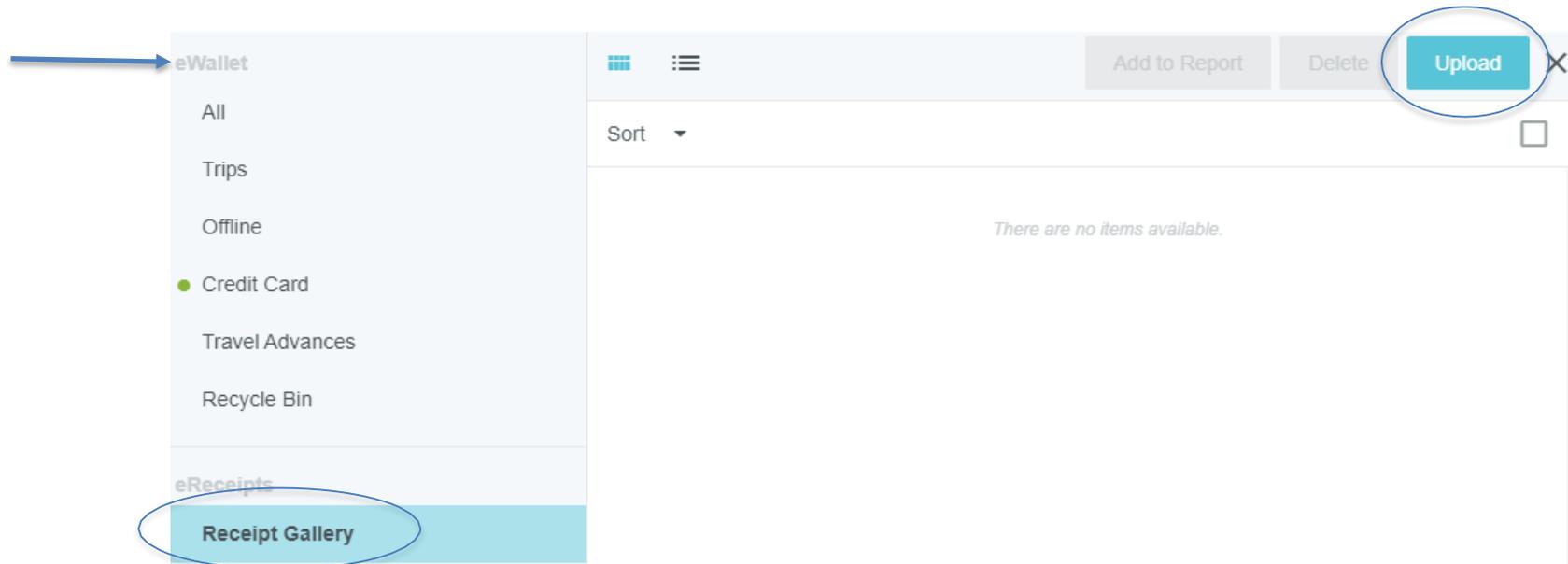
- An additional email will generate once approver has accepted or returned the report
- Comment is not required in the email. Simply select **Send**.



A final notification email is sent to the PCardholder, Delegate/Reconciler and Fund Manager when all approvals are complete.



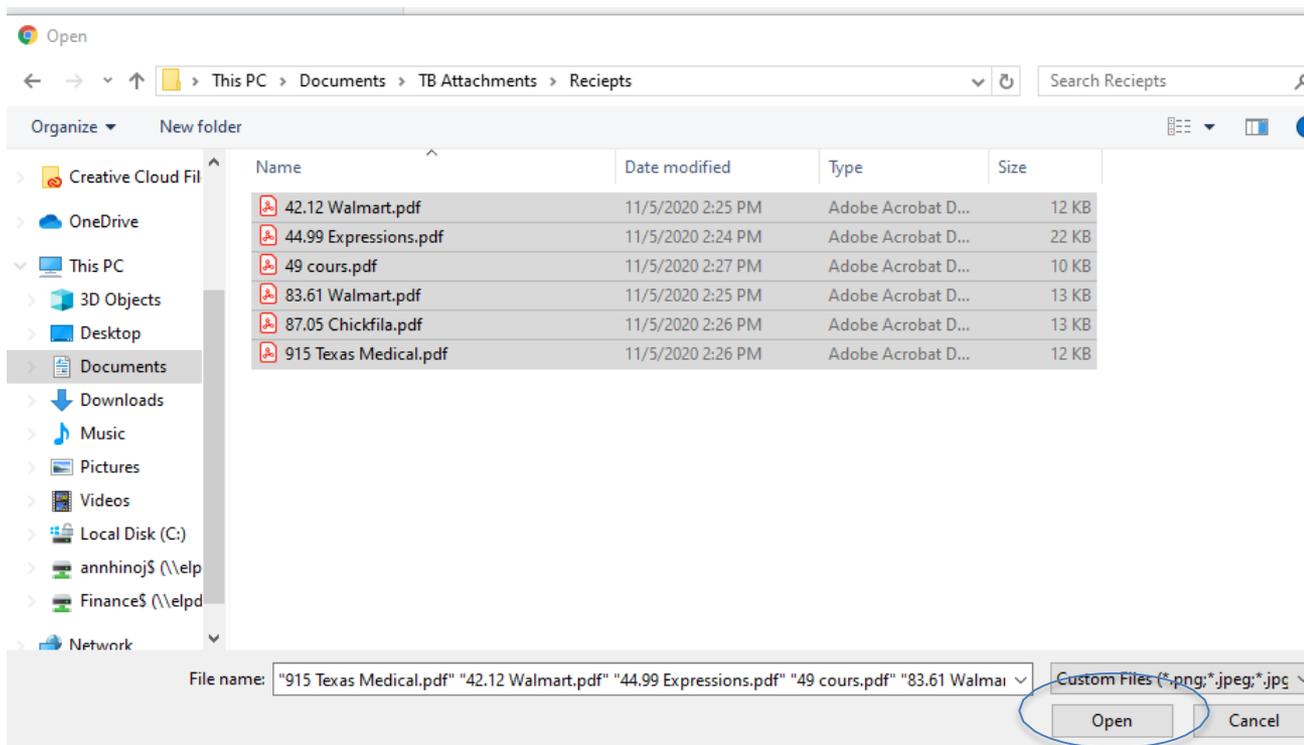
Upload Receipts from Desktop



- Select the Main Menu button → **eWallet** → **Receipt Gallery**
- Select **Upload**



Upload Receipts from Desktop



- Select the Receipts to upoad– more than one receipt can be selected.



Upload Receipts by Email

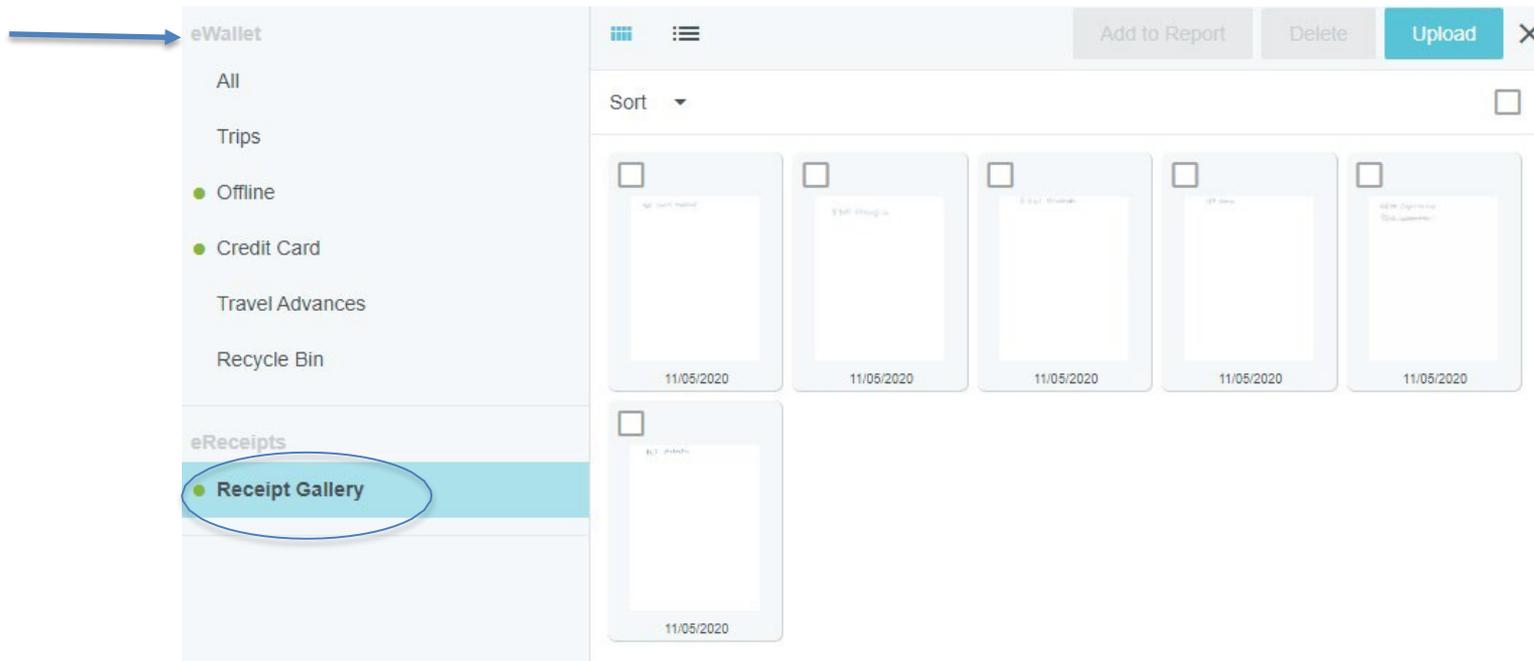
Send	From ▾	lupe.alvara@ttuhsc.edu
	To...	<input type="text" value="receipt@ca1.chromeriver.com"/>
	Cc...	<input type="text"/>
	Subject	12.50Walmart
	Attached	Receipt.pdf (227 KB)

Chrome River Walmart Receipt 12.50Walmart

- Cardholder can upload receipts by email
- Images or PDFs can be emailed to receipt@ca1.chromeriver.com
- Document will upload to the Gallery of the sender
- Email should contain:
 - From:** email associated with user's CR account
 - To:** receipt@ca1.chromeriver.com
 - Subject:** xx.xxVendor
 - Body:** Purpose of expense (optional)



Receipt Gallery



- Receipts will appear in your Receipt Gallery. Save by vendor and amount or amount and vendor, ie. 12.95Walmart or Walmart12.95.



Help Tools - Training Videos



Mobile Device access

Chrome River is a web application which means there is no need to download an app from the app store to your smart phone or tablet. Simply use your mobile browser to log in to app.ca1.chromeriver.com as you do on your desktop. Use the "Add to Home Screen" option to add Chrome River icon to your mobile device for easy access

Emailing Receipts to Your Account

Use the 'Snap and Send' feature to quickly load receipt images to your account. Simply take a photo of one or more receipts and email them to receipt@ca1.chromeriver.com. The receipts will then be available within your Receipt Gallery. Be sure to send the email from an email account that is registered with Chrome River. Your company email address is already registered and you can easily add other addresses via the Preferences menu.

Full HELP is available throughout the application in the Chrome River Help Center.


Getting Started
Help Guide


Creating a New Expense Report
Quick Start


Add Receipt Images
Quick Start


Approve Expenses
Quick Start


Create a Home Screen Shortcut
How To



Chrome River Help Center

+ New Annette Aguilar Hinojos

Annette Aguilar Hinojos
[VIEW PROFILE](#)
Last login:
12/03/2020 at 10:24 AM

Select Another User

Settings

System Administration

Help

Launch Walkthrough

Logout

Welcome to the Chrome River Help Center

Information, Tutorials, FAQs and More

Delegatel

Getting Started Create A Report Email Receipts

Your search for "Delegate" returned 30 result(s).

Delegates

Chrome River offers three types of delegation to allow users with appropriate permissions to create and You will ...

[A_Getting_Started/Delegates.htm](#)

Delegates Feed Refresh

How to Refresh Delegates Feed Data in QA To update your Delegates records, simply load a data file i data is intended ...

[G_Admin/Manage_QA/Delegates_Refresh.htm](#)



WebRaider – HSC Finance El Paso

- Link available in Payment Services section
- Additional tools available in Reference Material section

[Payment Services Home](#)

[Contacts](#)

[Forms](#)

[Helpful Links](#)

- [Citi Website - PCard](#)
- [Professional Societies List](#)
- [Swift Prepaid](#)
- [TechBuy System - DirectPay](#)
- [Travel System](#)
- [Vendor Payments](#)
- [Chrome River Expense Management Application](#)

Purchasing Card

- [Citibank Billing Cycle Dates 2021](#)
- [Purchasing Card System User Guide](#)
- [Purchasing Card Policy Training](#)
- [Chrome River Training](#)
- [Chrome River-Adding a Delegate](#)
- [Chrome River-Naming Your Report](#)
- [Chrome River-Account Code Reference Sheet](#)



Transition from GCMS to Chrome River

- The cycle ending on January 3, 2021 will be the final Citibank statement reconciled in Global Card Management System.
 - Deadlines will be sent out and the last paper documentation will be sent to Payment Services.
- Beginning January 4th, all PCard transactions started feeding into the PCardholders' profile in Chrome River.
- You can begin to allocate your expenses as they are posted to your profile.



February 2021 Cycle Expense Reports

- This month's expense reports should have the following start and end dates.
 - 01/04/21 - 01/10/21 = Week 1**
 - 01/11/21 - 01/17/21 = Week 2**
 - 01/18/21 - 01/24/21 = Week 3**
 - 01/25/21 - 01/31/21 = Week 4**
 - 02/01/21 - 02/03/21 = Week 5**
- Submit weekly reports. If you had no expenses posted to your account during a specific week, no expense report is required for that week.
- Transactions for the week will be fully available in Chrome River by the following Monday.
- A calendar for the remaining of the fiscal year will be posted in the Payment Services website.
- No reporting or a delay in reporting will result in suspension of the PCard



Questions?





TEXAS TECH UNIVERSITY
HEALTH SCIENCES CENTER,
ELPASO

