



Creating and Submitting a Standing Pre-Approval

Step 1: Complete the Standing Pre-Approval Header

Click **+Create**, in the top right-hand corner of the Pre-Approval ribbon.

Complete the **Pre-Approval Header**.

Report Name

Enter your last name, travel item (e.g., Car Rental/Fuel or Mileage), and either Spring 20xx or Fall 20xx. No punctuation. Maximum of 45 characters allowed, including spaces.

Start Date and End Date

Fall: July 1 – December 31

- Fall Standing Pre-Approvals are to be created (this includes creating drafts) on or after July 1. Fall Standing Pre-Approvals created and/or submitted prior to July 1 will be returned.

Spring: January 1 – June 15*

- Spring Standing Pre-Approvals should be created on or after January 1.
- The Spring 20xx Standing Pre-Approval end date must match the closing date of the May-June credit card billing cycle. Typically, the closing date is the 15th. However, if the 15th falls on a weekend day, then the closing date will differ. [Contact](#) Travel Procurement with questions about trip end dates for Standing Pre-Approvals.

Business Purpose

Provide details that answer what and why travel is being supported by the university:

Request Type

Select Employee Travel or Student Travel.

Travel Type

Select the option that best fits your travel type.

- If you will have both in-state and out-of-state travel items, then create separate Standing Pre-Approvals, one for each (e.g., Doe Mileage In-State Fall 2021 and Doe Mileage Out-of-State Fall 2021).

Primary Reason for Travel

This statement will appear for several travel types but not all. When applicable, choose the most relevant option available. When Other is selected, enter a detailed response in the text box provided.

This trip needs an activity code

If an activity code is needed for the trip expenses, then check the box and select the applicable code from the Activity Code drop-down list.



CHROME RIVER QUICK STEPS

Is there personal time included in this trip?

Select **Yes** or **No**.

Are you being compensated/reimbursed for any part of this trip from outside of a USI fund/org?

Select **Yes** or **No**.

- If Yes, then enter in the text box labeled **Outside Fund Details**, the source and amount of funding or enter the source and list the expenses being covered.

Allocations

Select the funding source for the trip.

Important: Review **ALL** the information on the Pre-Approval Header:

Although changes may be made to most areas of the Pre-Approval Header, after it has been saved, a change **cannot** be made to the Request or Travel Types. If an error has been saved for either the Request or Travel Types, then a new Pre-Approval will need to be created, and the incorrect one will need to be deleted.

After confirming the information is correct, click **Save**.

Step 2: Add Expense Estimates to the Standing Pre-Approval

A screen will appear after the Standing Pre-Approval Header has been populated and saved. This is called the Pre-Approval Report.

For most of the Standing Pre-Approvals, the most used Pre-Approval types will be found under the **Ground Transportation** mosaic (e.g., Car Rental, Fuel, Mileage, and Parking). To add one of these Pre-Approval types, click the respective sub-mosaic tile and enter the required information.

Delete or Edit a Pre-Approval Type

Click the **Pre-Approval Type** needing to be deleted or edited, from the left-hand side.

Delete will remove the Pre-Approval type and **Edit** will allow changes to the Pre-Approval type.

- View the guide [Deleting a Pre-Approval](#), if a whole Pre-Approval needs to be deleted.

Step 3: Add Comments and Attachments

To add Comments and Attachments, click the **Report Description** on the left-hand side. Click **Edit**.

Scroll down inside the Pre-Approval Report until the **Comments** and **Attachments** sections are in view.

