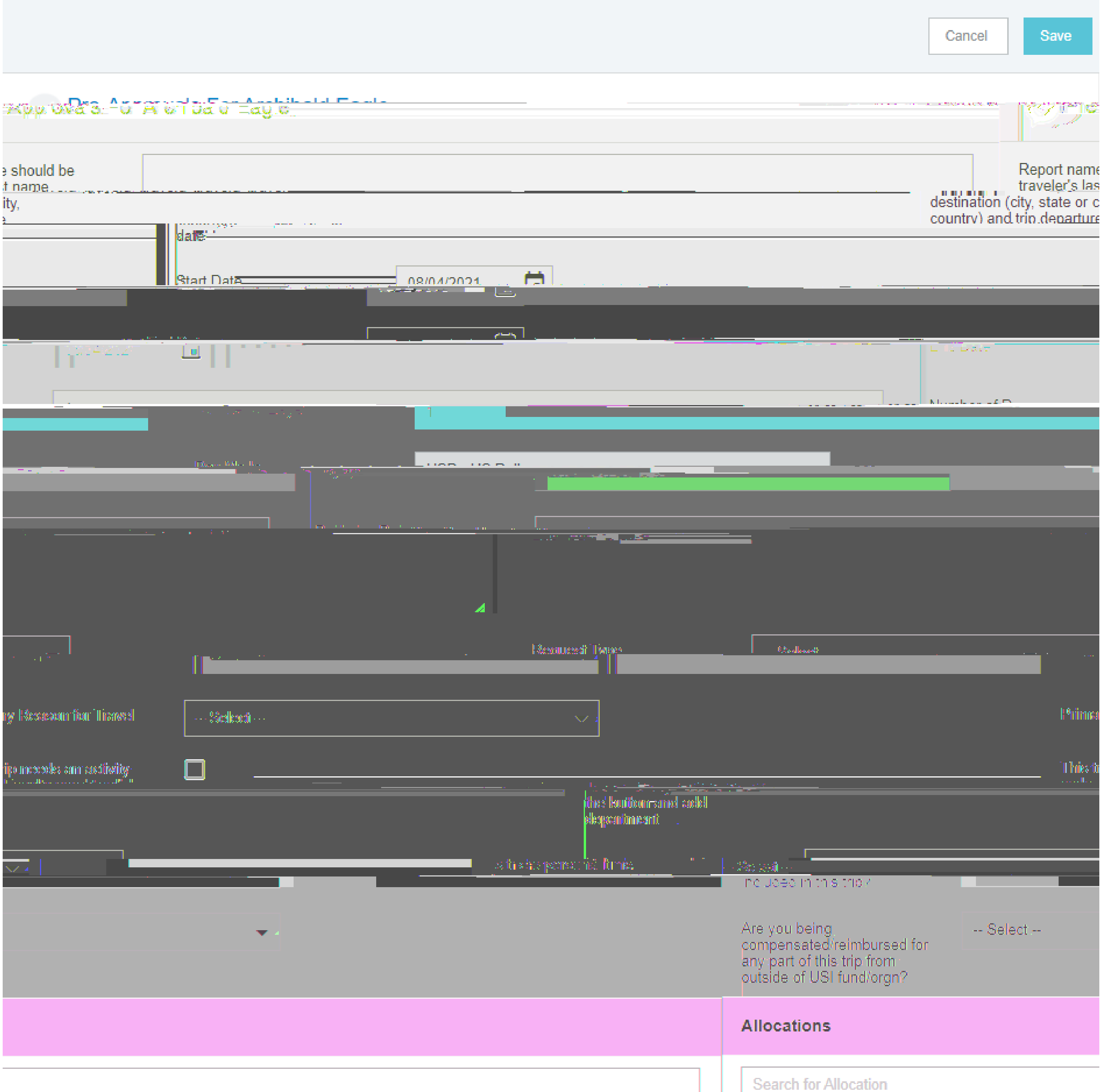
Complete the Pre-Approval Header.



Cancel
Save

Report name should be traveler's last name, destination (city, state or country) and trip departure date

Start Date 08/04/2021

Request Type -- Select --

Primary Reason for Travel -- Select --

This trip needs an activity ☐

Are you being compensated/reimbursed for any part of this trip from outside of USI fund/orgn? -- Select --

Allocations
Search for Allocation

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.

Faculty need to check this box and select their department from the drop-down list. If your department is not listed, then select the department in which your Chair resides.

Is there personal time included in this trip?

Select Yes or No.

If Yes, then enter the dates in the text box labeled Please list the dates of personal time.

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

Select Yes or No.

If l a b e a b e a b i r 0 T

u i) - 1 (c) - 2 e (x) - 2 f o p a) - 3 (r) - 1 (t h e) - 2 t r l

Delete or Edit a Pre-Approval Type

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

Deletewill remwoilvlegthe()Pre(e)-1 J 0 g /TTTw ( )Tj 0.001 0 9ll rJ 0 g /1.81d ( )Tj EMC 0 Td [(ne)-2(nd s)1 (/TT2

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

Comments

Use this area to:

- Communicate information to financial manager(s), or others, in the approval routing, if applicable.
- Provide other information that may be helpful.

Important:

- Comments are visible to ALL who have access to the Pre-Approval report and will appear on the approval email notifications. Also, comments are permanent, and once posted, they cannot be deleted

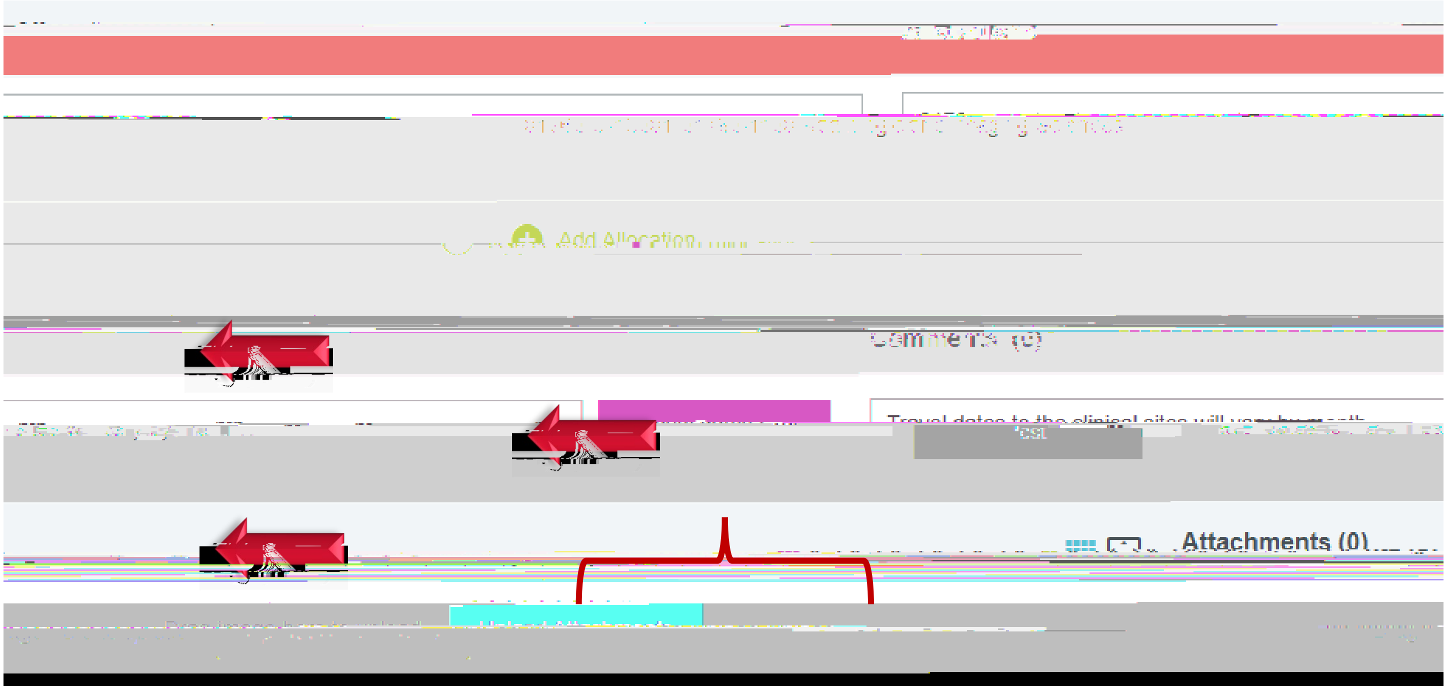
Attachments

Use this area to upload:

- Meeting schedules, letter of invitation, etc.
- Documents for internal communication such as class coverage schedule.
  - Tip: A document, with information about the purpose and dates of the event/trip, must be uploaded. If no document is uploaded, then Travel Procurement may return the Pre-Approval to you so one can be uploaded to it.

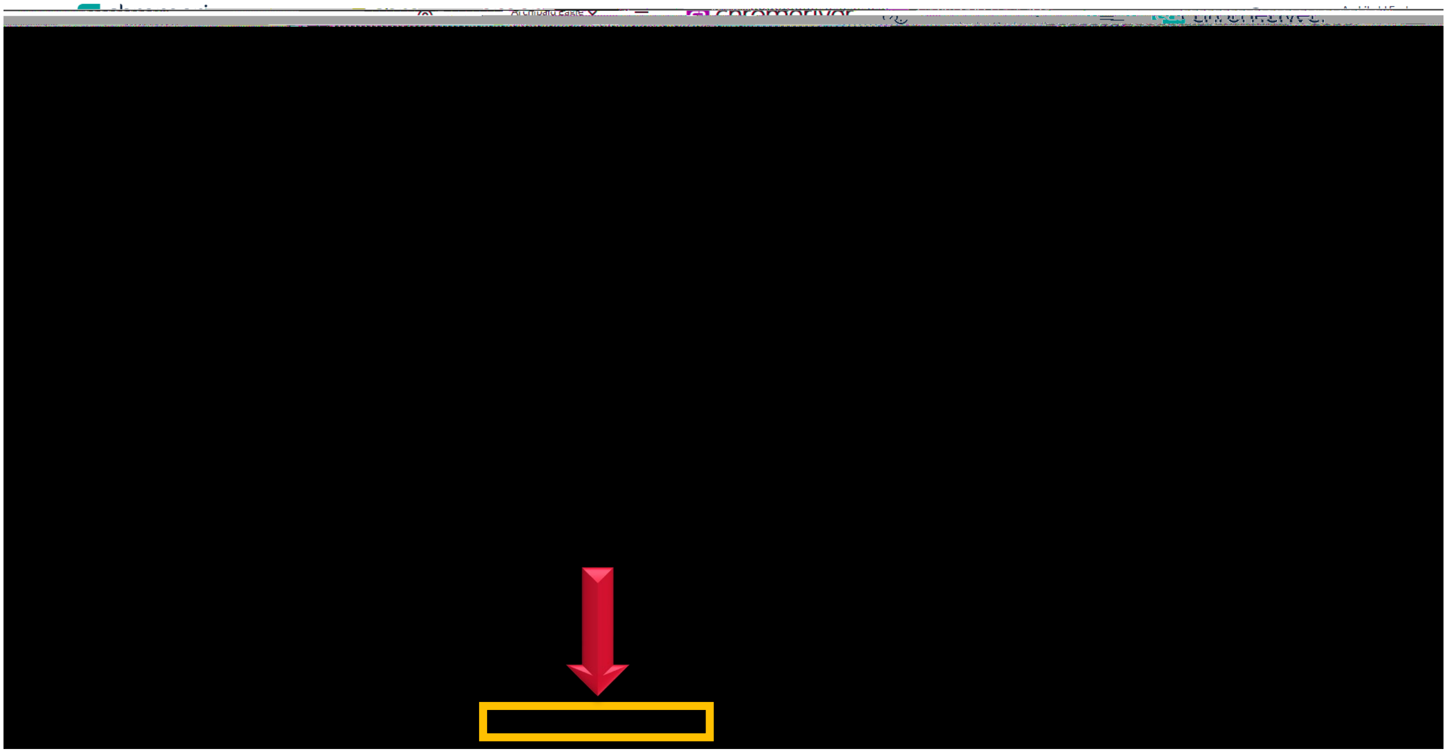
Note:

- Chrome River can only attach documents of the following formats: PDF, PNG, and JPEG.
- Documents can be dragged to the elected area or added via the Upload Attachments button.
- Attachments may only be removed if deleted BEFORE the Pre-Approval report is submitted.
  - Tip: To remove an attachment, click the file in the Attachments section. A window will appear on the left showing the document. Find and click the red trashcan in the upper left-hand corner to delete it.



Step 5: Submit the Pre-Approval

Click Submit.



An opportunity will be given to perform a final review of all the Pre-Approval trip information.

After the final review, click Submit.

Submit Preapproval

The message below will briefly appear, at the top of the screen, if the report was submitted successfully. View the guide Tracking a Pre-Approval to view the Standing Pre-Approval's current approval status.

Report submitted