



Employee and Student Out of Pocket Reimbursement

Chrome River is used to reimburse employees, and sometimes students, for purchases made on behalf IU using personal funds. Whenever possible, follow a preferred procurement method, such as a Purchase Order or using a departmental Procurement Card (P-Card) to make business related purchases. Reimbursement is the least preferred method and should only be used in emergency situations or as a last resort.

Contact pocket@iu.edu with any questions related to employee or student reimbursements in Chrome River.

Note: The Chrome River application works best using the Google Chrome browser.

Navigate to Chrome River via the [task tile in One.IU](#), or access Chrome River directly by visiting <https://chrome.iu.edu>. If you haven't already, you will be prompted to enter your IU login information and DUO authenticate.

Once logged in, click **+ New** next to your name in the upper right-hand corner to start a new expense report.

If you are submitting a reimbursement on behalf of another user, click your name in the upper right-hand corner, select them from the user list, then click **+ New**.

If you do not see the user in this list you are not established as a Delegate for that user.

The screenshot displays the Chrome River application interface. At the top, the 'CHROME RIVER' logo is visible on the left, and the user's name 'Sarah Chavez' and a '+ New' button are on the right. The main dashboard shows a summary of expenses: 0 Draft, 0 Returned, and 2 Submitted (Last 90 Days). Below this, there is a 'GETTING STARTED' section with a list of instructions:

- + New** button: Use the + New button at the top right to create a new trip or p-card report.
- +** button: Use the blue round (+) plus button to add expenses to your trip or report.
- Att Attachments** button: Upload associated receipts or email to receipt@chromefile.com, and attach to the expense. Sensitive data (card numbers, home address, etc.) in attachments must be redacted prior to uploading. Information on properly redacting sensitive data is available [here](#).
- Submit** button: Submit reports and trips with the green Submit button.



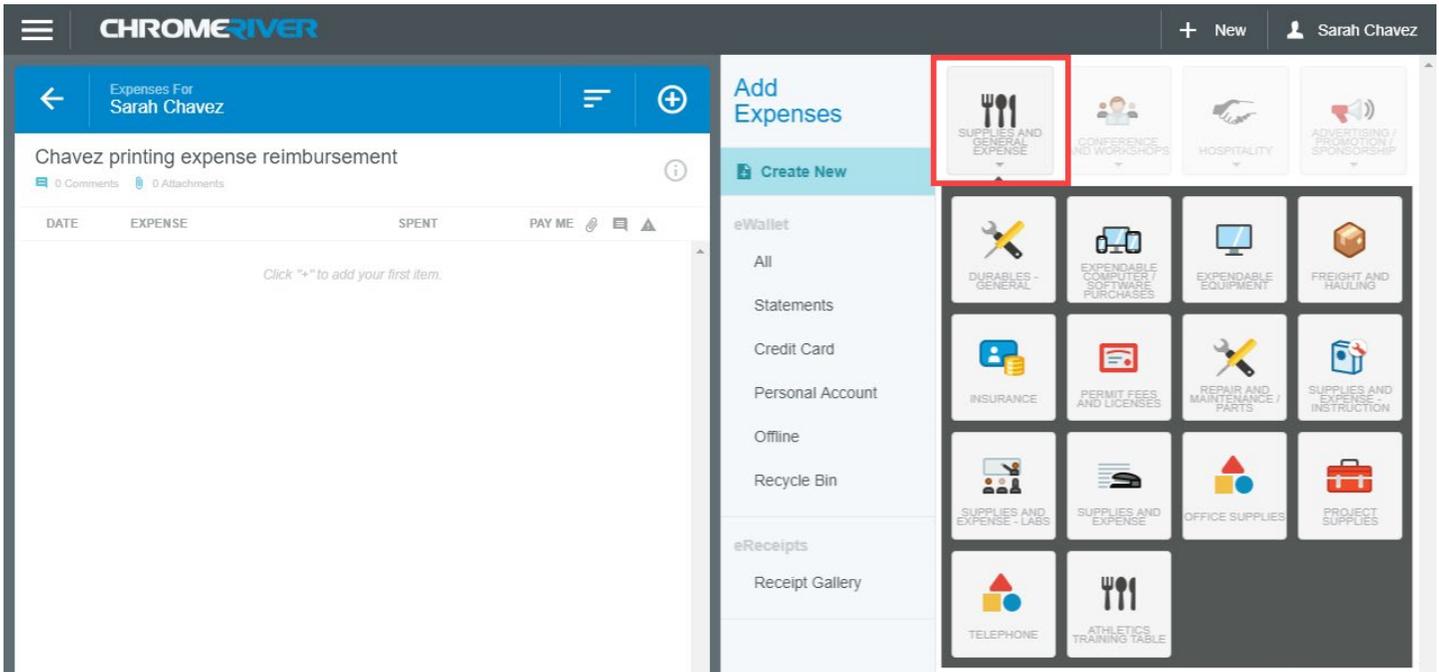
In the **Report Name** field, enter the payee’s last name and a short description of expense being reimbursed, then select Out-of-Pocket Reimbursement in the **Report Type** drop down menu.

A **Business Purpose** field will appear. In this field, describe the IU business need of the purchase. Text entered in this field will be used to support the reimbursement during an audit. Enter as many details as possible - Two thousand characters are available.

Once you’ve completed the **Business Purpose** field, click **Save** in the upper right-hand corner.

Chrome River displays a series of mosaic tiles. Choose a tile that describes the category to which the reimbursement belongs.

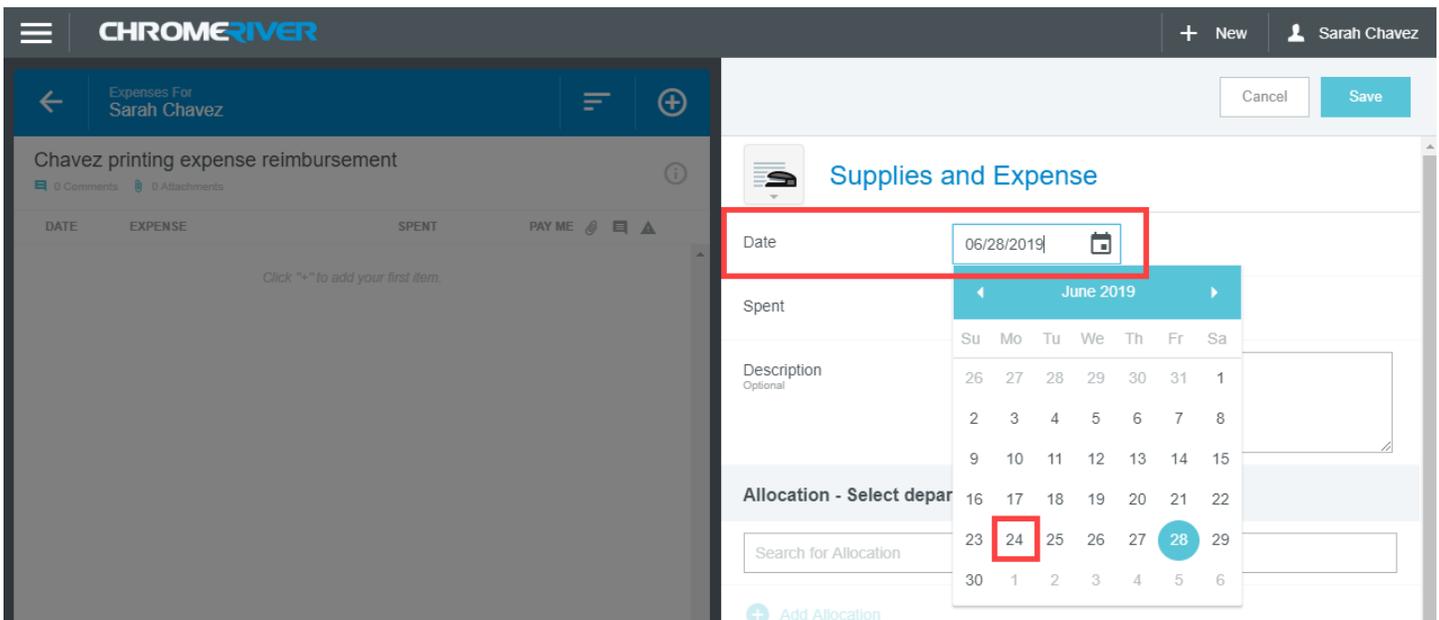
In this example, we are reimbursing printing expenses, so we’ll select the **Supplies and General Expense** mosaic tile. Selecting a mosaic tile generates additional options.



These more specific options, referred to as drawers, are mapped to KFS object codes. You may review a list of drawers mapped to object codes on Purchasing’s website. Always talk to your Fiscal Officer or other individuals in your group if you are unsure of which object code to use.

In this example, we’ll select **Supplies and Expense**. Click on the drawer and Chrome River generates new fields which allow you to enter the details of the reimbursement.

Enter the date of the purchase in the **Date** field. You may manually type in the date or use the calendar widget to select it.





Enter the amount to be reimbursed in the **Spent** field.

Tax paid on purchases is reimbursed at the discretion of your department.
Talk to your Fiscal Officer or other individuals in your department for guidance.

The screenshot shows the 'Supplies and Expense' form in the CHROME RIVER system. The 'Spent' field is highlighted with a red box and contains the value '33.59 USD'. The 'Date' field is '06/28/2019'. The 'Description' field is empty.

Next, enter additional details related to the purchase in the **Description** field. This field is optional in most cases.

When entering a reimbursement using the **Membership Fees and Dues** mosaic tile, the **Description** field is required and must identify the name of the membership organization to which fees/dues were paid.

The screenshot shows the 'Supplies and Expense' form in the CHROME RIVER system. The 'Description' field is highlighted with a red box and contains the text: 'Copies were made at Office Max since that was the only store that was open at the time. Was not able to go to Staples.'



Now move to the Allocation section of the report.

Click in the **Allocation** field and Chrome River populates accounts you have used recently. You may also search for an account by typing it in the search field. Click the account, and subaccount if appropriate, to select it.

Expenses For Sarah Chavez

Chavez printing expense reimbursement

DATE EXPENSE SPENT PAY ME

Click "+" to add your first item.

Supplies and Expense

Date: 06/28/2019

Spent: 33.59 USD

Description: Copies were made at Office Max since that was the only store that was open at the time. Was not able to go to Staples.

Allocation - Select department account

1915030|

- 1915030-AREA1 UA-PUR PURCHASING DEPARTMENT
- 1915030-AREA2 UA-PUR PURCHASING DEPARTMENT
- 1915030-AREA3 UA-PUR PURCHASING DEPARTMENT
- 1915030-AREA4 UA-PUR PURCHASING DEPARTMENT
- 1915030 UA-PUR PURCHASING DEPARTMENT

You may add another account by clicking the **+ Add Allocation** option. Search for another account, then designate how the reimbursement should be split using the fields next to the account numbers. You may split the reimbursement by percent or by amount.

Allocation - Select department account

1915030-AREA1 UA-PUR PURCHASING DEPARTMENT

+ Add Allocation

Project Code (Optional): -- Select --

Organization Document Number (Optional):

Project Codes and **Organization Document Numbers** are optional and used at the discretion of your department. Contact your Fiscal Officer or other staff in your organization to determine what should be entered in these fields.



Finally, supporting documentation must be added in the Attachments section of the report to substantiate the reimbursement.

The screenshot displays the Chrome River mobile application interface. On the left, a list of expense reports for Sarah Chavez is shown, with 'Chavez printing expense reimbursement' selected. The right pane shows the form for this report, including fields for Date (06/28/2019), Spent (33.59 USD), and Description. The Attachments section is highlighted with a red box, showing 'Attachments (0)' and an 'Add Attachments' button.

This usually consists of receipts or other documents which include: the items purchased, date of purchase, proof of payment, and the vendor's name. When reimbursing a payment made with cash, a statement of attestation that cash was used is considered proof of payment.

IMPORTANT! Ensure all critical data is redacted from the document prior to upload.

Examples of critical data include complete credit card numbers or bank account numbers, among others. [Review proper redaction techniques in the Knowledge Base](#) and learn more about what constitutes critical data on the [Data Management Team's website](#).

You may attach documentation in multiple ways:

- Drag a PDF, PNG, or JPEG version of the documentation into the report window from your desktop.
- Click **Add Attachments**, then **From Receipt Gallery** to search for a receipt in your Receipt Gallery. [Click here for more information about the Receipt Gallery in Chrome River.](#)
- Click **Add Attachments**, then **Upload Attachments** to search for a document on your machine.



Once all attachments are uploaded, click **Save** in the upper right-hand corner.

The screenshot displays the Chrome River interface for an expense reimbursement. On the left, a sidebar shows the expense report for Sarah Chavez, titled 'Chavez printing expense reimbursement'. It includes a table with the following data:

DATE	EXPENSE	SPENT	PAY ME
Fri 08/28/2019	Supplies and Expense	33.59 USD	33.59

At the bottom of the sidebar, it shows 'Expense Report QA0033711483' and 'Total Pay Me Amount 33.59 USD' with a 'Submit' button. The main interface on the right shows the 'Save' button highlighted in a red box. Other visible elements include a 'Cancel' button, a text input field containing 'Staples.', an 'Allocation - Select department account' section with a dropdown menu showing '1915030-AREA1 UA-PUR PURCHASING DEPARTMENT', an 'Add Allocation' button, a 'Project Code' dropdown menu, an 'Organization Document Number' input field, a 'Comments (0)' section with an 'Add Comment' input field and a 'Post' button, and an 'Attachments (1)' section with a 'Drag image here to upload' area and an 'Add Attachments' button. A single attachment is visible below the upload area.

The reimbursement is added to the expense report, located in the left-hand side of the screen.

Repeat the steps outlined above as many times as necessary to reimburse expenses, using the mosaic tiles and drawers to itemize the reimbursements as appropriate.



Once all reimbursements are added, click the **Submit** button in the lower-middle section of the screen.

CHROME RIVER + New Sarah Chavez

Expenses For Sarah Chavez

Chavez printing expense reimbursement

DATE	EXPENSE	SPENT	PAY ME
Fri 09/28/2019	Supplies and Expense	33.59 USD	33.59

Expense Report QA0033711483 Total Pay Me Amount **33.59 USD** **Submit**

Allocation - Select department account

1915030-AREA1 UA-PUR PURCHASING DEPARTMENT

Project Code

Organization Document Number

Comments (0)

Attachments (1)

1 of 1

Chrome River will prompt you to attest that the expenses being submitted are true, correct, and for legitimate business purposes. Review the expenses one final time and click **Submit** to confirm and submit the report.

CHROME RIVER + New Sarah Chavez

Expenses For Sarah Chavez

Chavez printing expense reimbursement

Submit Confirmation

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

Cancel **Submit**

Chavez printing expense reimbursement

Report Owner Sarah Chavez

Expense Report ID QA0033711483

Financial Summary

	AMOUNT (USD)	APPROVED (USD)
Total Expense Reported	33.59	0.00