BEFORE TRAVEL
A. At least 2 weeks before your trip, complete the travel authorization form found here:
https://college.webhost.iu.edu/travel/travel_req.cfm
Please complete all fields unless otherwise noted below.

TRIP DETAILS
1. Do not use acronyms for conferences – spell out the full conference name
2. If the purpose is research, please be specific as to the type of research and why it necessitates the travel
3. If you will request per diem but will not have lodging receipts (e.g. you are staying with a friend), please note that in the “Trip details” field.

EMERGENCY CONTACT INFO

ESTIMATED BUDGET
4. When you look up per diem rates, use the M&IE rate (Meals & Incidental Expenses), not the full per diem rate. The full rate includes lodging, which IU treats separately. You might have to scroll down on the Per Diem page to see the M&IE rates.
5. Per diem is calculated at 75% for the first and late date of travel, at 100% for all other days (excluding personal days).
6. If you don’t know the exact amount for any given expense, an estimate is allowed.
7. For the first 3 items under “Estimated Budget,” be sure to select YES if the item is going to be charged directly to your account, or NO if you will pay yourself and be reimbursed. The default is YES, but that may not be accurate.
8. You only need to enter budget lines for items you plan to use IU funds to pay (in advance or as a reimbursement)

TRIP FUNDING
9. Be sure enter your account number in the “Trip Funding” section. Most of you will not use a sub-account, in which case you can leave the Subaccount field alone. If you don’t know which account number to use, check with Isabel.
10. In the “Trip Funding” section be sure to complete the Amount Charged column with the total from the “Estimated Budget” section above, or some portion thereof.
11. In the “Trip Funding” section, add notes if you plan to apply for departmental or other campus funding for your trip, but that funding has not yet been verified.

TRIP APPROVAL
12. Enter your IU username as “preparer.”
13. Choose Isabel Piedmont-Smith’s name as Fiscal Officer, so that she will get the email to record the information and check your account for available funds
14. Do not proceed with travel arrangements until you have received an email from Isabel replying to your form submission!

B. To prepay travel expenses directly with an IU account:
1. For lodging and airfare, use Egencia. If you have never used the IU Egencia website before, first email travelbl@indiana.edu to request access. They will need your full legal name, IU email address, and IUID number. Within Egencia, you will be asked for a department code. It is FRIT.
2. For car rental originating in Bloomington, book through Enterprise Campus Rental.
3. For airport limo service, book through Classic Touch
4. If you prefer the old-fashioned way, you can still use an IU-designated travel agent to charge airfare and/or lodging directly to your account.
5. ALL PREPAID TRAVEL will require you to provide your IUID number so that the expenses can be linked to you in Chrome River.

C. Prepaid expenses will show up directly in your eWallet in Chrome River. Lisa Huffman and Isabel will have access to your eWallet to retrieve these. However, you still need to keep any emailed or printed receipts for verification.

DURING TRAVEL
1. Save your receipts (except for food, which is covered by the per diem rate)
2. If you like, you can snap a photo of each receipt and email it to receipt@chromefile.com. Still keep the paper receipt for 120 days.
   NOTE: If the email address from which you send the receipt is NOT your IU email address, then you’ll need to go into Chrome River, click your name in the upper right corner and go to Settings > Personal Settings > Email addresses to add the other email address.

AFTER TRAVEL
Staff-assisted process:
   Good news! Lisa and Isabel can access your accounts in Chrome River.
   • Bring or email your receipts to Lisa, including receipts for prepaid travel
     o Please keep each receipt separate, as they must be scanned a certain way
   • Lisa will create an expense report in Chrome River for your trip
   • Isabel will check the expense report before it is routed to Travel for approval

Do-it-yourself process:
   • If you would like to tackle the Chrome River travel expense report yourself, please see instructions below.
   • Lisa and Isabel are available to help
   • The expense report will still route to Isabel for approval

RULES TO REMEMBER
1. Travel expenses cannot be reimbursed more than 60 days after the last date of travel. You will no longer get a warning message telling you of the approaching deadline, so PLEASE KEEP TRACK.
2. Travel expenses less than $75 do not require documentation, but they do require an expense report. In other words, if an expense less than $75 is your ONLY expense for travel, you still have to fill out the authorization form and then let Lisa know when the trip is done.
3. If you have any expenses less than $75, those will be reimbursed to you separately from the expenses that are more than $75, since the routing for approval is different and more quick.
4. Per diem rates for the first day and last day of travel are automatically calculated in Chrome River at 75% the set government rate. It is assumed that you will spend only 75% of the day traveling.
5. Car rental is only allowed for the following classes of cars: compact, economy, and intermediate.

If you have any questions, please let Isabel and/or Lisa know!
If you want to tackle the Chrome River system yourself:

Expense Reports in Chrome River
1. Log into Chrome River via https://one.iu.edu (search for Chrome River, then click the app)
2. Chrome River works best using Chrome or Firefox web browsers
3. Create a new expense report
   - Click the “+ New” button in the upper right corner of the screen, next to your name
   - Name your report following this convention: “Trip to X – Month Year” (e.g. Trip to Chicago – August 2018)
   - Fill in the details of your trip
   - Check the box “Does trip include personal time?” only if you did have personal time on your trip
   - Click Save in upper right
4. Add expenses to your expense report by clicking the + sign in the blue header bar of the report.
5. After you choose your expense type and fill out the top of the form, you will be asked to provide an “Allocation,” meaning an IU account number.
6. Then you will need to link receipts to this expense:
   - If you had prepaid expenses, these will be in the “Credit Card” area
   - If you did “snap and send” (took a photo of a receipt and sent it via email), this will be in the “Offline” area
   - If you have paper receipts, you can scan them and upload them into Chrome River
   - Expenses must be fully itemized – A credit card receipt alone will not be sufficient

For more information, see https://www.indiana.edu/~travel/index.shtml.