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.
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.

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.
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.

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.

**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.

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 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 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.