



University Process Improvement Chrome River Travel/Expense Implementation

Project Scope:

With continued efforts toward reducing administrative costs and providing more efficient tools for students, faculty and staff, the University has contracted with **Chrome River Technologies** for its Travel and Expense module. Upon implementation, there will be a paperless, streamlined travel and expense process that is user-friendly and will decrease the turnaround time for reimbursements. Chrome River Travel & Expense system will also allow improved enforcement of travel policies.

Travel Policy Updates:

- Eliminated unnecessary and outdated travel limitations.

Travel POs:

- Pre-approvals replaced the need for departments to request the creation of Travel Pos.
- Removed accounting from the approval process.

Empowerment of Traveler:

- Paperless process.
- Ease of creating pre-approval and expense reports.
- Standardized process for travel requests via pre-approvals.
- Travel Cards were established, allowing the traveler to pay for travel expenses, except for meals.
- Travel Advances allowed for 80% of the per-diem amount via travel card ATM withdrawal.
- Chrome River fully functional mobile app.
- Ease of uploading receipts via the app or to the expense report.
- Travel card transactions systematically load to the traveler's eWallet.
- Selection of correct approver via index.
- Mileage calculates via google maps.
- Meals per-diem calculates based on travel location.

Systematic Processes Eliminating Manual Processes via Load to Banner:

- Encumbrances and liquidations.
- Expense Invoices.
- JV travel card charges.

Process Improvements:

- Eliminated the need to walk through paper forms for approval.
- Eliminated manual creation for Travel Pos.
- Removed Accounting approval for travel pre-approvals (encumbrances).
- Electronic approval process via email.
- Eliminated creation of invoices.
- All travel reimbursements are paid via direct deposit.



- Centralized travel with the Shared Services Department.
- Non-travel reimbursements are processed via Chrome River.
- Travel policy compliance rules and Conus rates are established in Chrome River.
- Eliminated direct billing for Travelennium and Car Rentals, as employees can use their UofM travel card.
- Upon final approvals, reimbursements can be processed within 2 weeks or less.
- Encumbrances systematically expire/liquidate 90 days after the travel end date, reducing the need for manually liquidating.
- Reduction in reporting information and data entry errors.
- Eliminated the manual process and management of future year encumbrances.
- Created a process to systematically generate an AP address for all employees, eliminating errors when invoices are loaded for processing.
- Chrome River user guides created.
- Accounts Payable reports are created to identify issues, so corrections are made prior to processing.

Metrics on Staff Savings:

- Savings Shared Services staff no longer creates Travel POs for faculty and staff.
- Paper cost savings, as it is a paperless process.
- Accounting staff no longer approve travel POs.
- Accounts Payable staff no longer create and maintain external records for future year encumbrances.