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- Eliminated unnecessary and outdated travel limitations.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.