SDSU | Research Foundation

Chrome River
Expense Module

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Training Agenda

- Chrome River: What is it and Module Timeline
- Chrome River User Accounts and Fund Allocations
- Stuff we want you to know
- Questions before moving to demo
- Demo! Let's log in and take a look
- Questions
- Training resources

Chrome River – What is it?

➢Phase 1 - implemented Fall 2023
  ➢Replaced US Bank Access Online for Pcard charge allocation

➢Phase 2 – Live for soft launch May 2024
  ➢Miscellaneous advances/reimbursements and travel advances/claims

➢Phase 3 – Coming early 2025
➢Payments to SDSU/SDSURF affiliated individuals for non-reimbursements
  ➢Miscellaneous income, stipends…
➢Payments to non SDSU/SDSURF affiliated individuals and those without a Chrome River account
➢Payments to Vendors

Chrome River – What it isn't

PaymentWorks onboarding is still necessary for anyone receiving payment. Ensures all paperwork is submitted properly before check is issued.

Chrome River does not replace back up documentation. All back up that was previously required for a disbursement requests in MyRF Document Processing is still needed.

Phase 2 Chrome River is Live!

➢ MyRF Document Processing available until Phase 3 completion
    ➢ *All new advances must be requested and cleared in Chrome River*
    ➢ Can submit reimbursement requests in either doc processing or Chrome River – not both – until Phase 3 launch.
    ➢ Best to be familiar with Chrome River before cut off!

Chrome River Accounts

MyRF user accounts provision/deprovision Chrome River accounts.

Chrome River uses SSO with SDSU log in credentials

Chrome River Account
Set up

Chrome River account set up: MyRF -> Fund Management -> User Security

· Chrome River Account – Provides user with a Chrome River account and provides access to allocate reimbursements and invoices to the orgs specified. Approval by PI/Fund Manager is required. User will be available the next day in Chrome River.

· Does NOT provide access to financial data in MyRF Fund Management

Chrome River Allocations

What funds are available in my dropdown selection?

➤ Any fund that a user has access to in MyRF
➤ Funds where a user is a PI or has signature authority
➤ Access to charge on Pcard
➤ Employee on fund
➤ Chrome River only account

Automatic Routing

➢ Expense reports are automatically routed based on fund(s) used.

➢ Approvers are emailed when a report has been submitted and is ready approve
  ➢ Can approve via email or can log in to Chrome River for review/approval

➢ Routing progress can be tracked in Chrome River

➢ User reporting – Inquiry report available
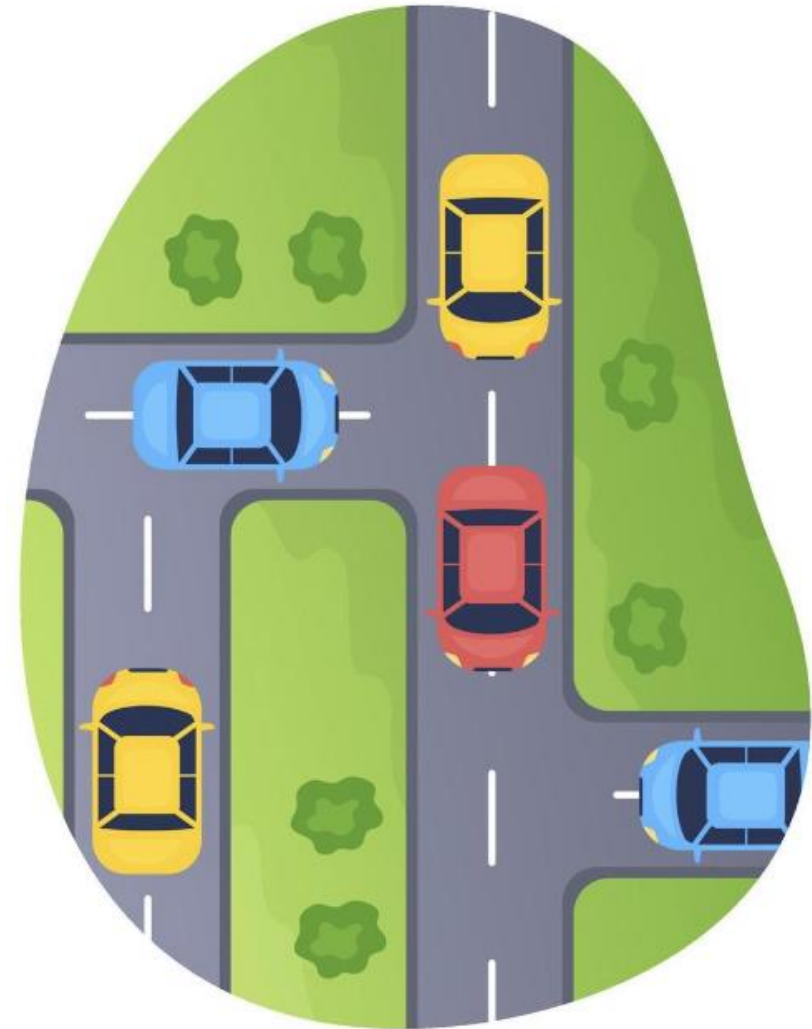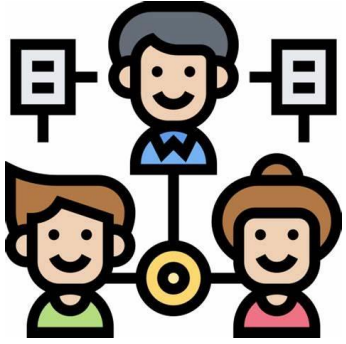
Delegates

➤ Delegates can prepare expense reports/preapprovals and submit to expense owner for approval

➤ Users can set up their own delegates in Chrome River account settings

➤ **When creating a report as a delegate the funds available for allocation are based on the person receiving the payment NOT the delegate.**

➤ Delegates cannot approve on behalf of the expense owner

➤ Delegates must have a Chrome River account

Electronic Receipt Management

➢Multiple ways to send receipts to CR
  ➢Snap and Send via Chrome River SNAP app
    ➢Download available in App stores
  ➢Email forward directly to account
  ➢Drag and Drop!
➢No need to keep paper receipts
➢Expense reports available in MyRF

Chrome River Resources

➢Foundation.sdsu.edu -> Departments -> AP -> Chrome River
  ➢General information
  ➢Links to written and video training materials

➢Email questions to sdsurfchromeriver@sdsu.edu

The Moment You've Been Waiting For!