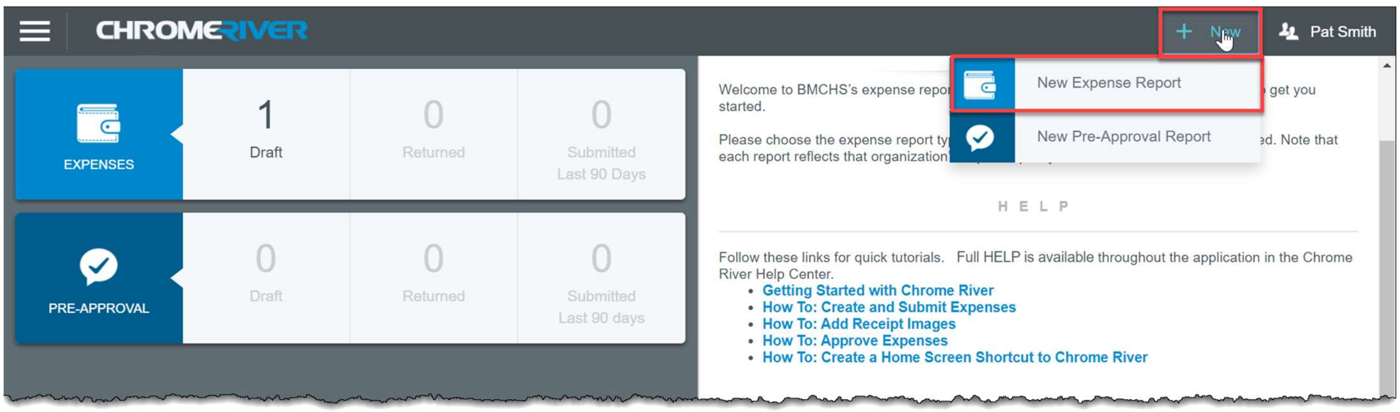
Boston Medical Center
HEALTH SYSTEM

CHROMERIVER by emburse

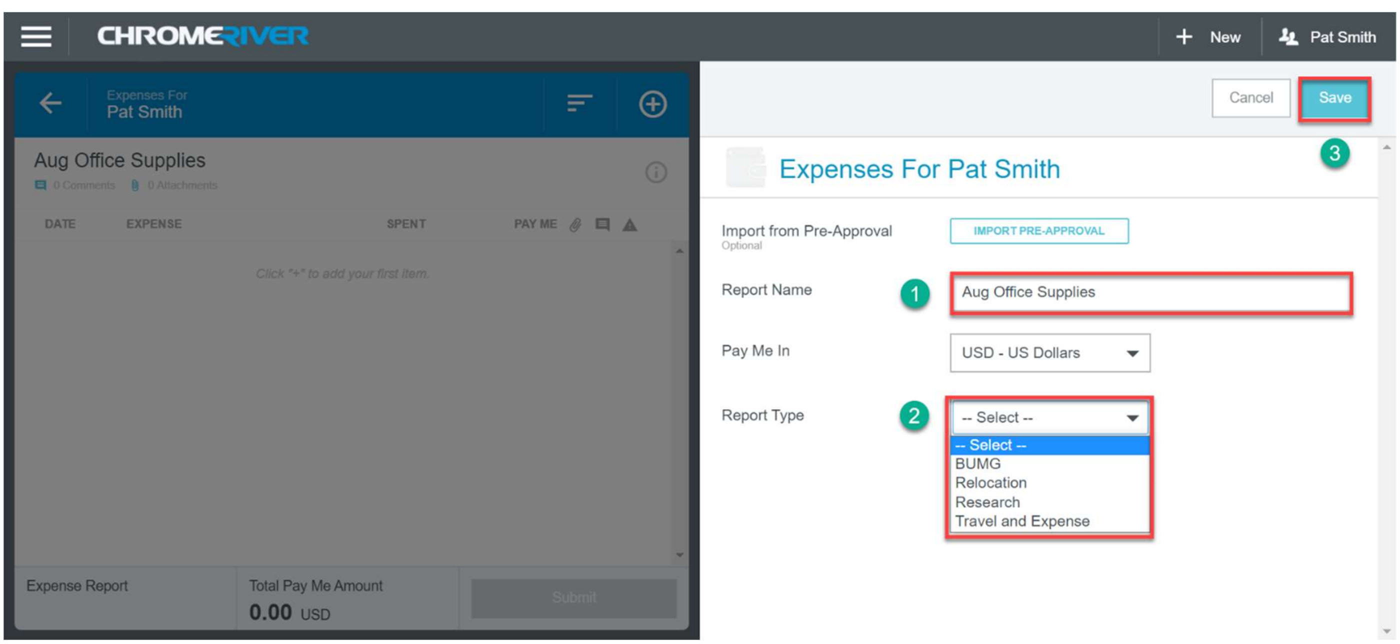
TIP SHEET: CREATE AN EXPENSE REPORT

1. Use Single Sign On (your email and usual password) to log in to Chrome River from the link on Accounts Payables' page: https://internal.bmc.org/departments/finance/accounts-payable/expense-reimbursements-and-travel. We have had issues when people type the link in so best option is to click the link in the first paragraph.
   The main screen is called the **Dashboard**.

2. On the Dashboard, click **+New > New Expense Report.**



3. Fill in the **Report Name**, select a **Report Type** and click **Save.** The report type should apply to the expenses you are submitting, e.g., select Research if submitting expenses for a grant. Relocation will be available on a limited basis. The name you give your expense report is what will show up in financial reports for your cost center or grant.



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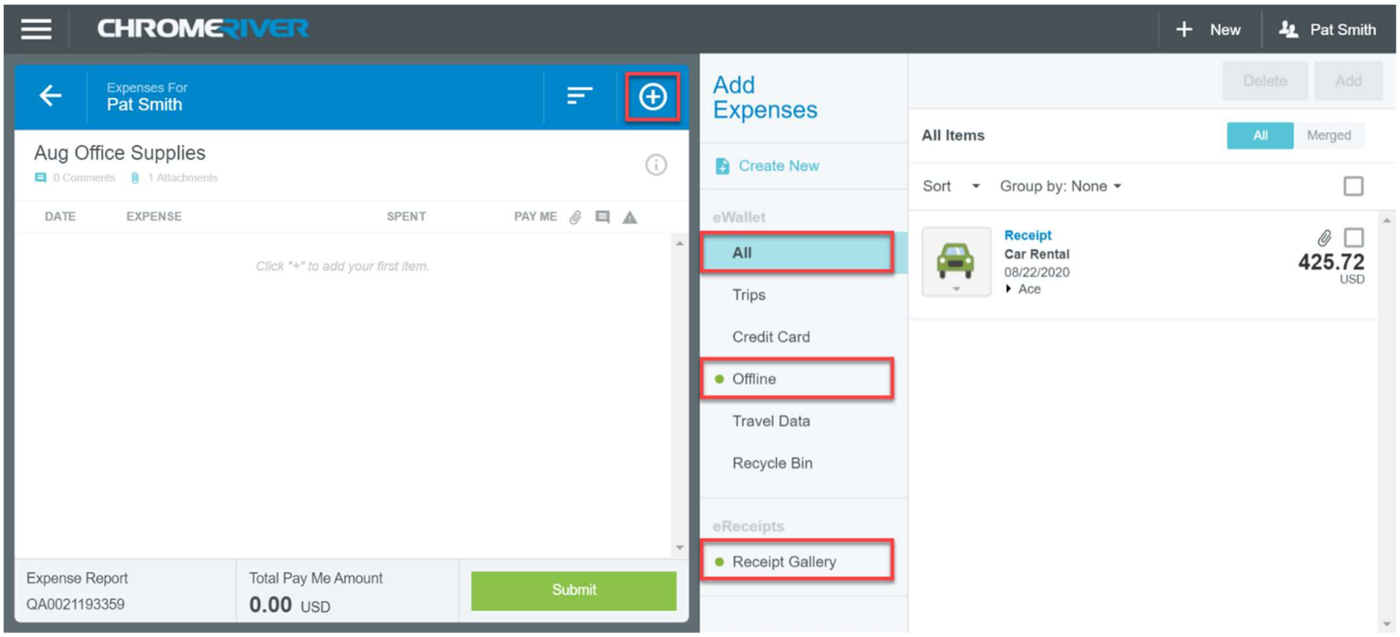
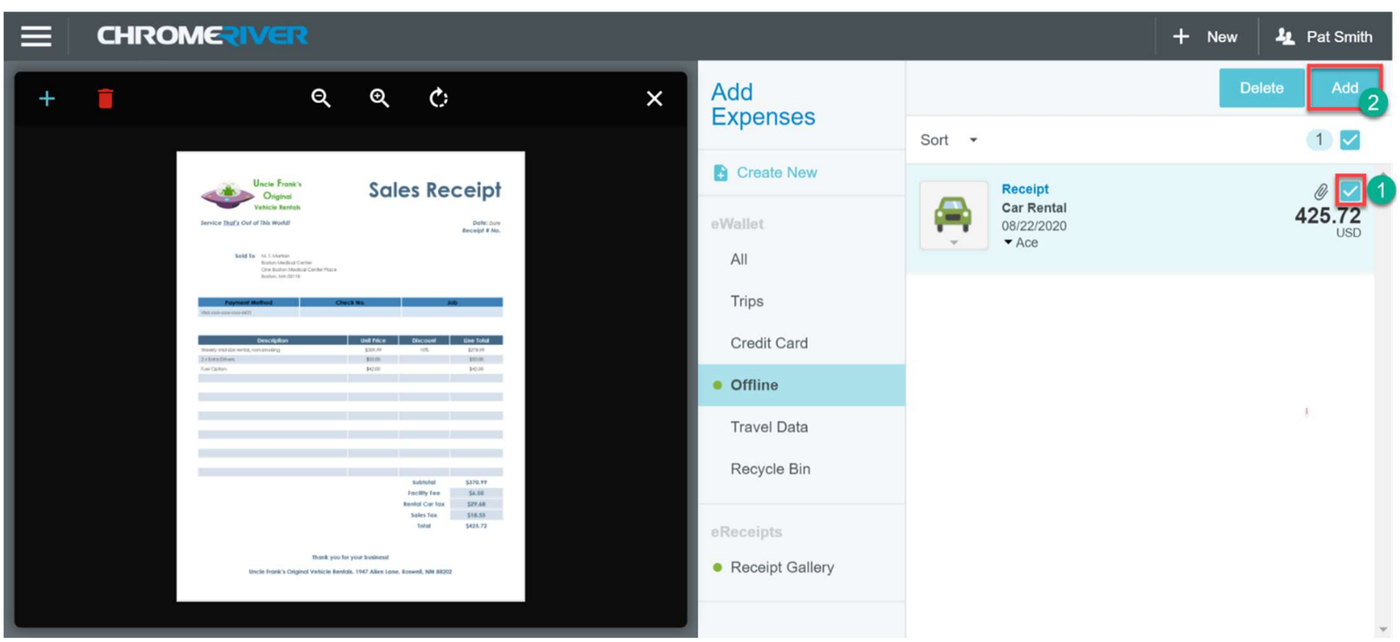
4. Add an expense. There are two ways to add an expense, depending on whether or not you have already uploaded a receipt. To add more than one expense to this report, repeat this step for each expense.

METHOD 1: RECEIPT ALREADY UPLOADED

Uploaded receipts will appear in the All and Offline tabs, and some will appear in the Receipt Gallery. (Note: If the "Add Expense" section is not shown, click on the ⊕ to bring it up.)

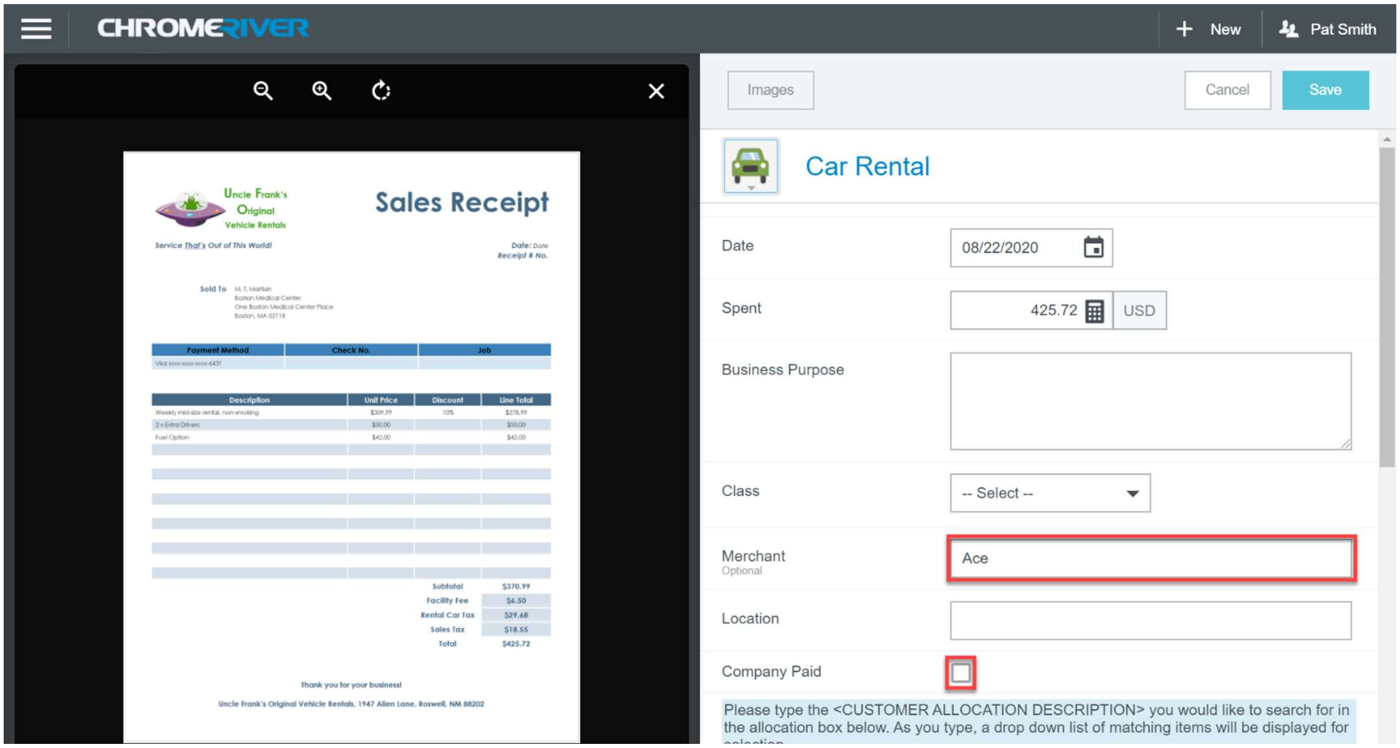


a. Find the desired receipt and click the **checkbox**, then click **Add. Receipts are required for all expenses over $35, according to policy.**

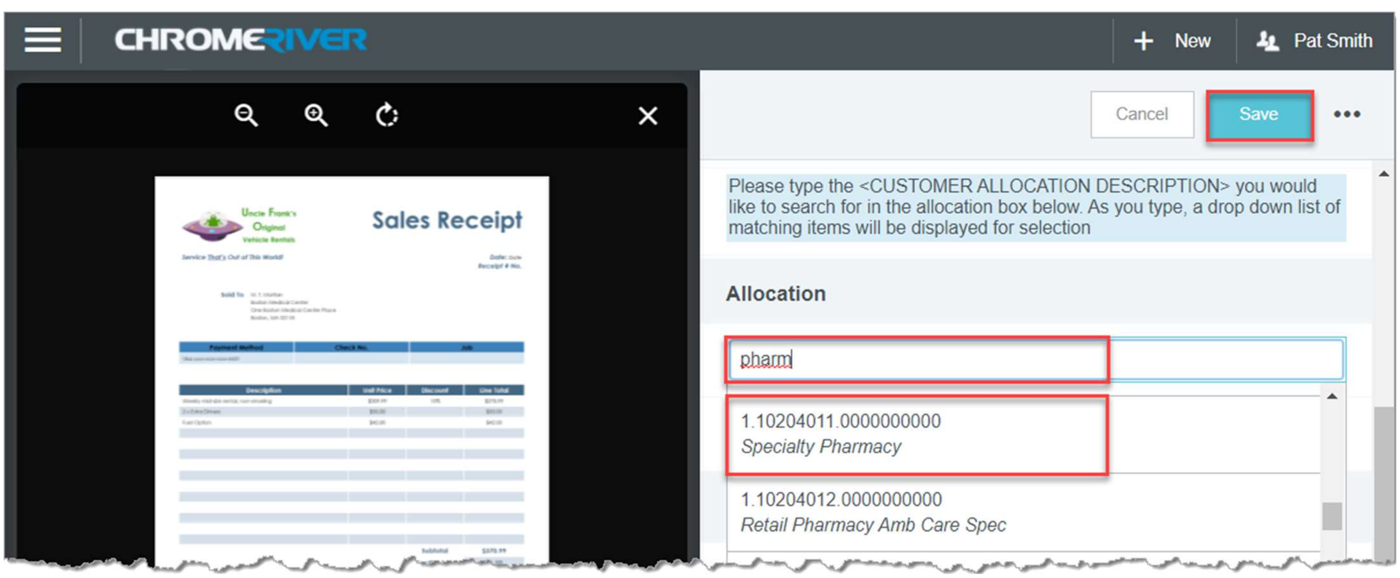


b. Complete and/or correct the expense informaton. Be sure to review information filled in by the system's OCR system. In this example, the Merchant name was read incorrectly.

Date (Use the date of the expense, not today's date)
Amount Spent
Business Purpose (Be specific about WHY, not just WHAT.)
Merchant (Optional)
Company Paid (Check this box if the company paid for this, not you, i.e., you do not need to be reimbursed.)



c. In the **Allocation** box, type part of the name of the cost center (department that will pay for this expense). A list of matching choices will appear. Click on the desired cost center.



d. Click **Save** when finished.

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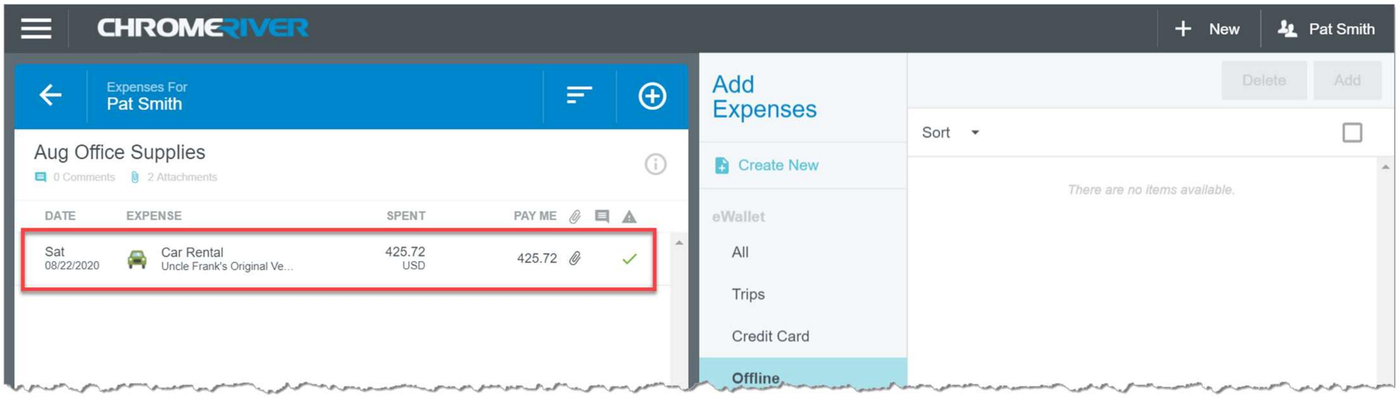
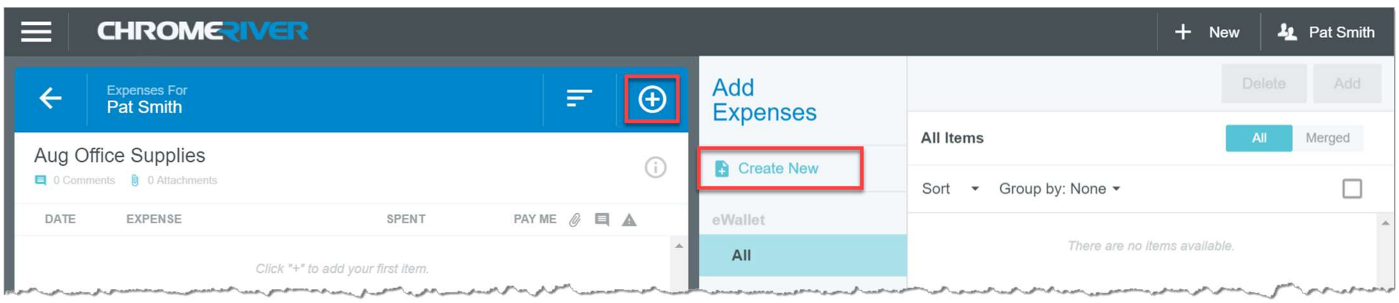
The completed expense item will appear on the expense report.



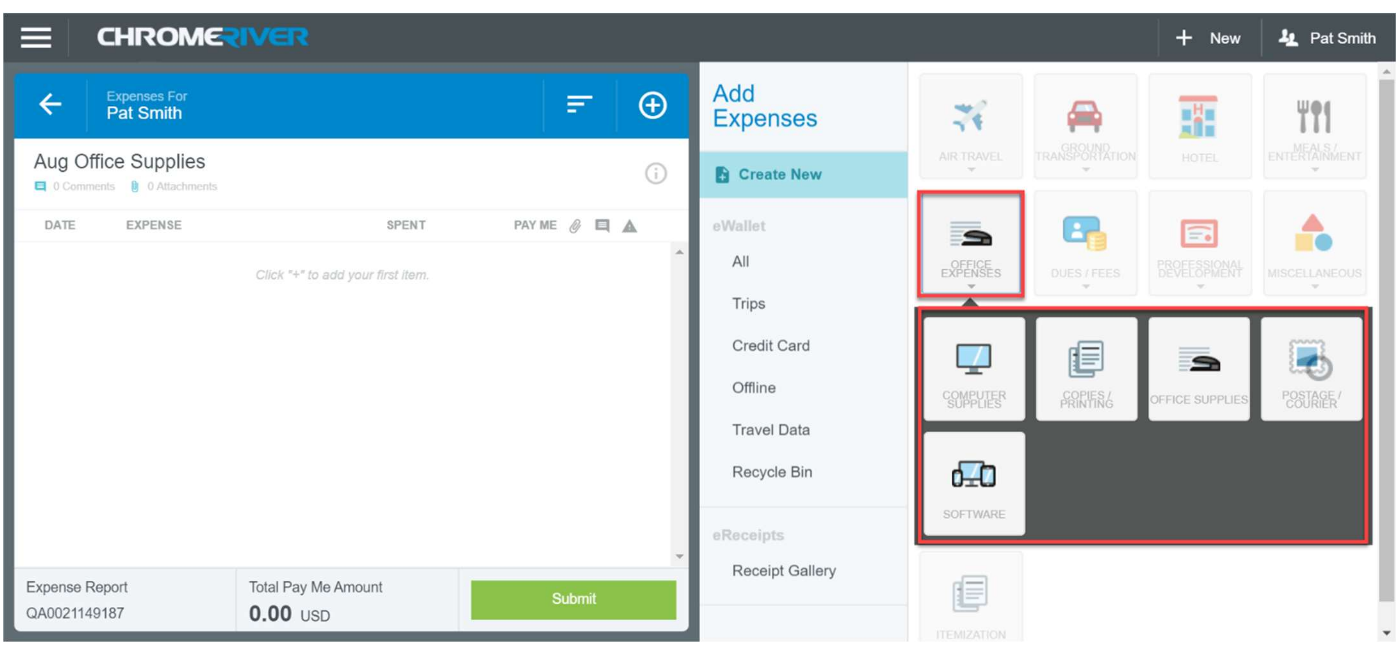
If you also need to add receipts that have not yet been uploaded, follow the steps below. Otherwise skip to step 5.

METHOD 2: RECEIPT NOT UPLOADED

a. Click **Create New**. (Note: If the “Add Expense” section is not shown, click on the ⊕ to bring it up.)



b. Click on the desired expense category and, if needed, subcategory. In this example, we clicked on **Office Expenses > Office Supplies**.



e. Fill in the following:

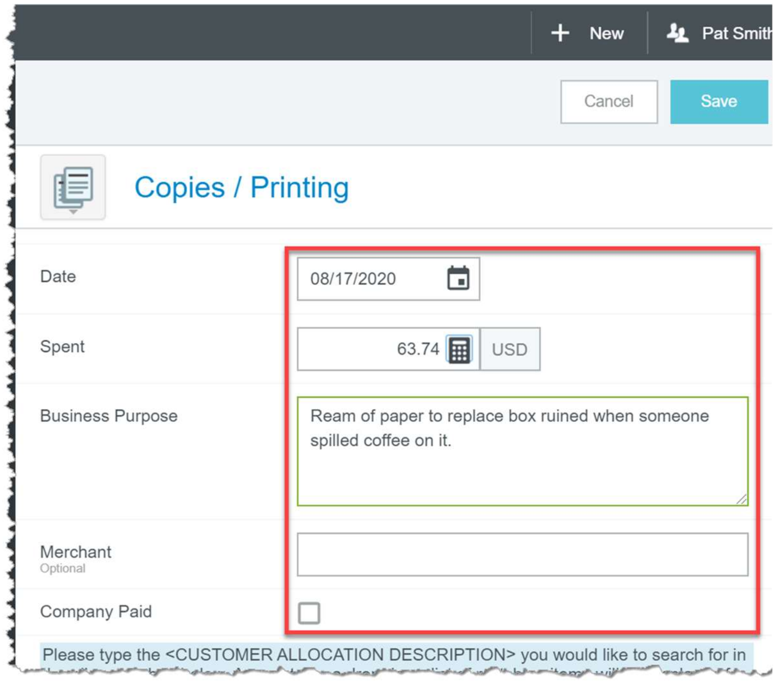
Date (Use the date of the expense, not today's date)

Amount Spent

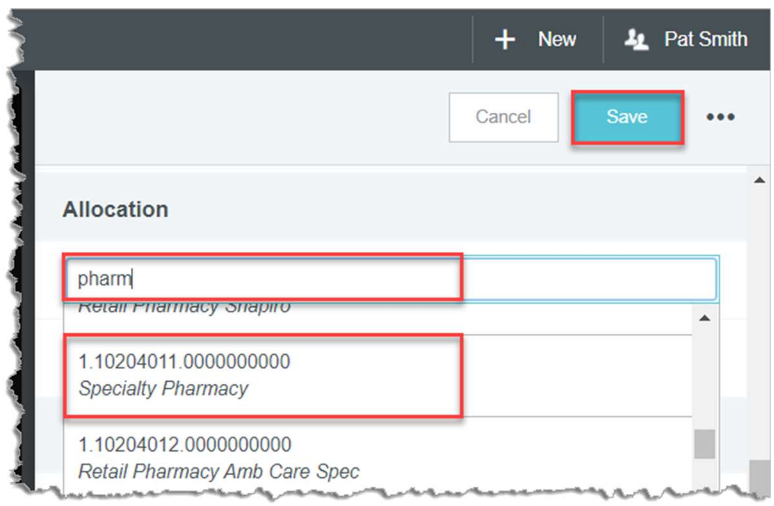
Business Purpose (Be specific about WHY, not just WHAT.)

Merchant (Optional)

Company Paid (Check this box if the company paid for this, not you, i.e., you do not need to be reimbursed.)

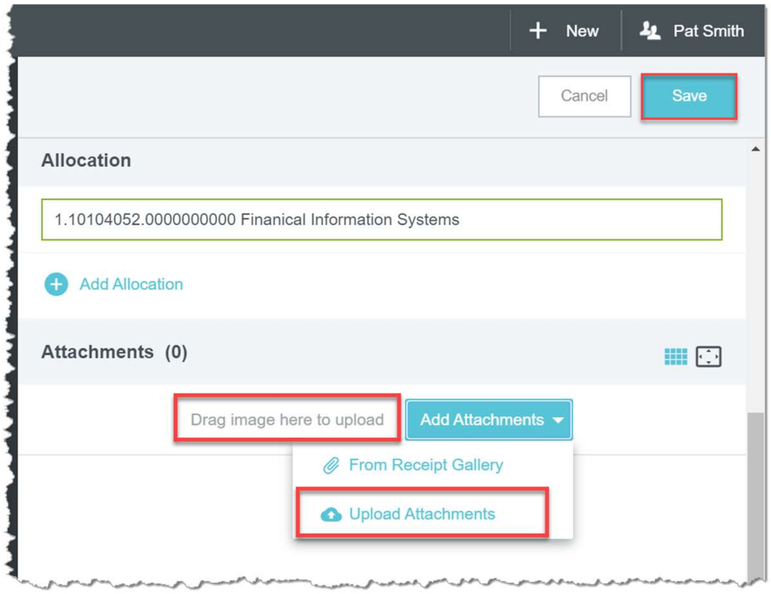


f. In the **Allocation** box, type part of the name of the cost center (department that will pay for this expense). A list of matching choices will appear. Click on the desired cost center.



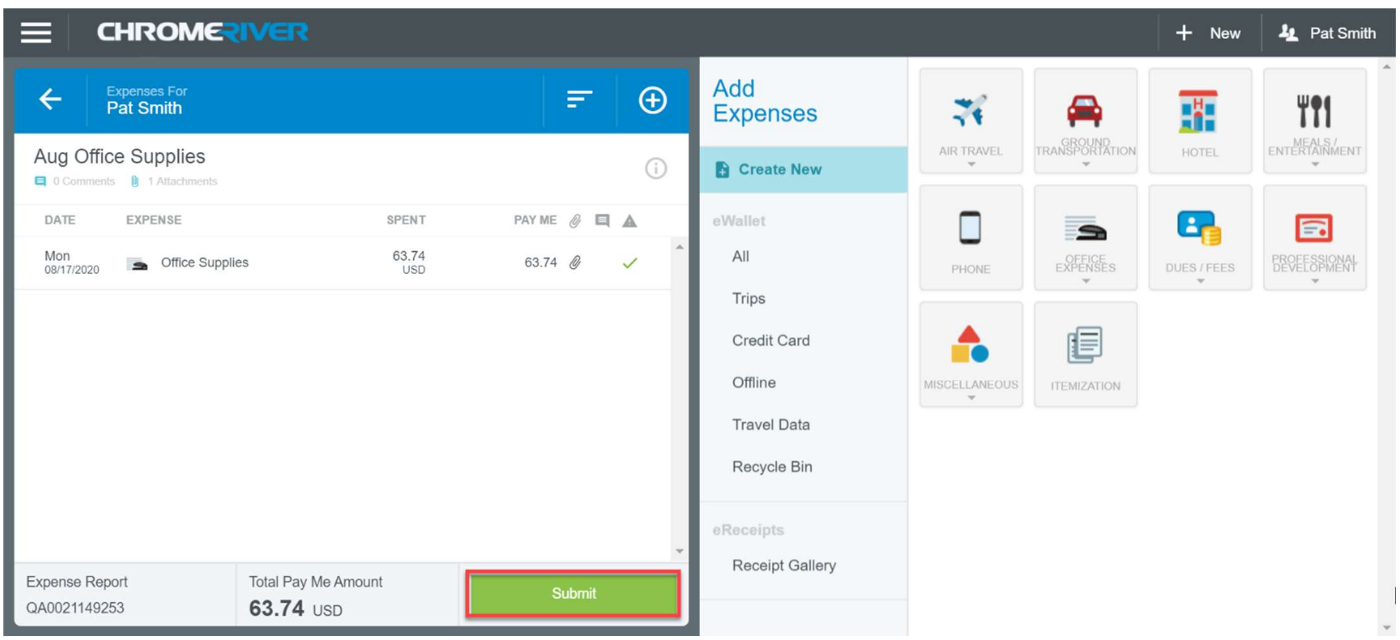
g. Attach a receipt. Make sure you have scanned or photographed your receipt, and you know where the file is located. Repeat this step to attach additional receipts.

   Drag a receipt image to the area under Attachments.
   -OR-
   Click **Add Attachments > Upload Attachments**. Find and double-click on the desired receipt image.

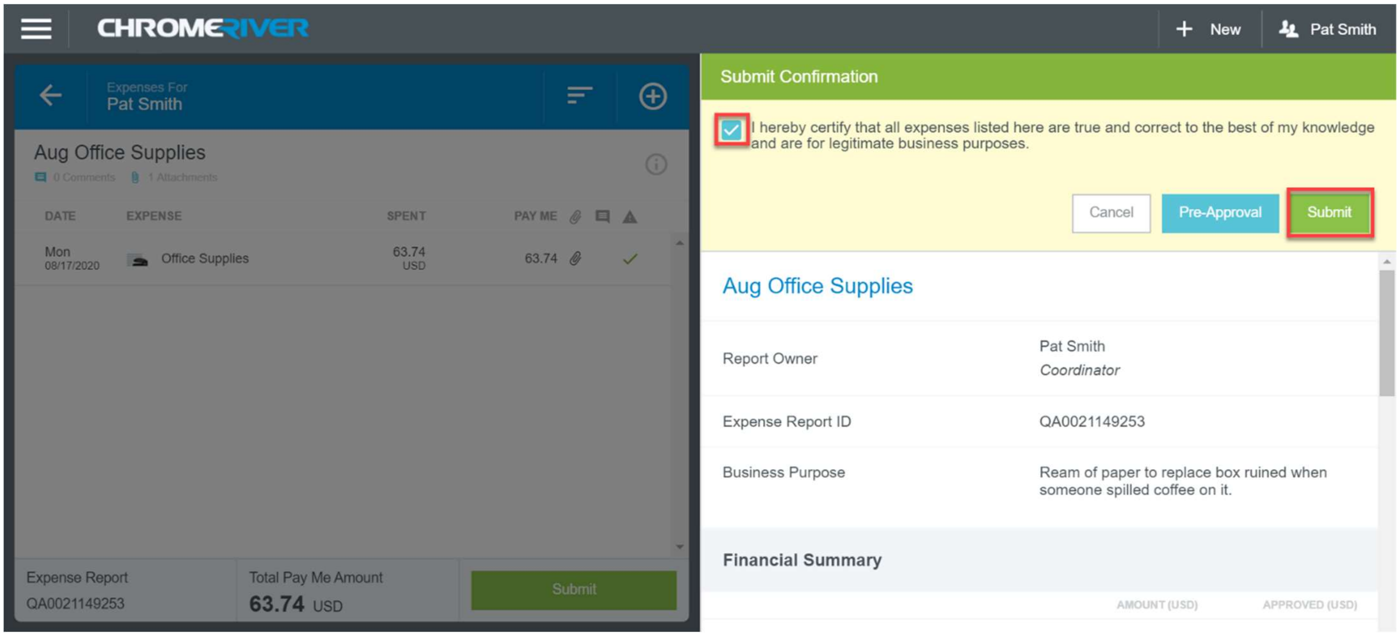


h. When you have attached all your receipts for this expense, click **Save.**

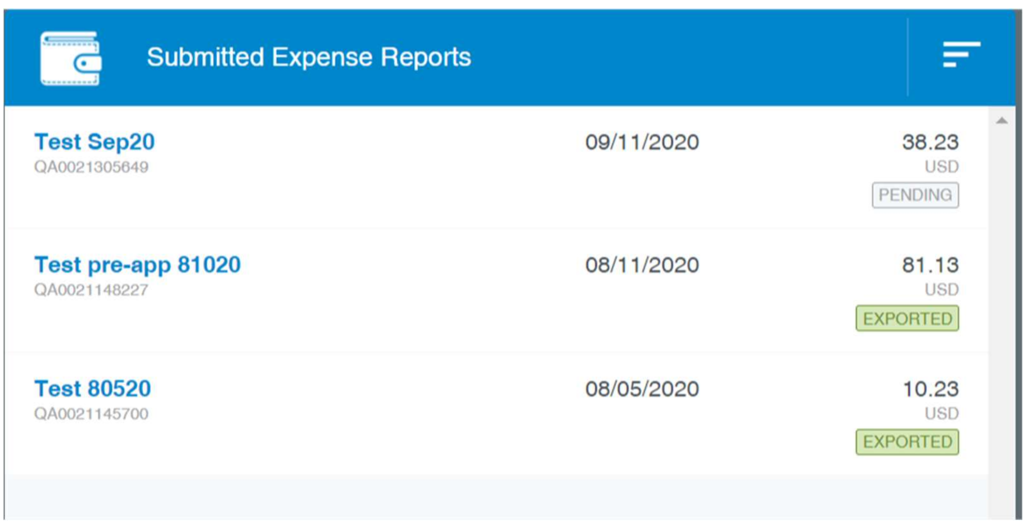
5. When you have added all of your expenses, click **Submit.**



6. Click on the checkbox to confirm this expense, then click **Submit**.



Submitted expense reports will show the status. Pending reports are awaiting approval. Approved reports are will be exported Sunday night. Exported reports have been exported to Workday or Infor for payment (employees are reimbursed through Workday and other staff through Infor).



Clicking on the report and then on the Tracking button will show where the report is in the workflow.