

PRE-APPROVAL - PRIOR TO REGISTERING

To request reimbursement for continuing education, certification review courses or certification exam expenses, follow the instructions below to submit a pre-approval request via Chrome River. Once the pre-approval is approved by your manager/director, you may register for the program.

 Type app.chromeriver.com in your browser url. Enter your Northwell Universal ID, your Chrome River password, and Northwell as the company ID.

<u>First-time Users</u>: Click Forgot Password, and enter your Northwell email address. Click the link to Create Password. Your company ID is "Northwell".

All professional development and travel reimbursements require a pre-approval.

- From the My Dashboard screen, click on the Expense Icon at the top of the page.
 Select Pre-Approval from the drop down box that follows.
- **3)** Click on the **Request Pre-Approval** Icon to go to the Pre-Approval screen.
- 4) Enter the Pre-Approval Request Name

 (e.g., name of program, certification prep course or
 certification exam), Date(s) of program and
 Business Purpose (e.g., continuing education,
 certification prep course or certification exam).
- **5)** Type your **8-digit department** number in the Allocation Charge To box, then select it from the drop down list.

If you do not know your department number, check with your manager or director. Entering an incorrect number will result in your request being rejected by the system.





6) Enter the cost of the program or conference in the **Prof Dev box** and any necessary details in the box next to it. Provide as much detail as possible for your approver to review.

Note: If requesting reimbursement for travel and/or other expenses, speak to your director prior to submitting the pre-approval.

- Estimated Expenses Airfare 0.00 From/To Location Lodging 0.00 Location Grnd Trns 0.00 ---From/To Rail 0.00 ----0.00 📰 Meals Prof Dev 0.00 Other 0.00 📰 0.00 USD Total
- 7) Add any documentation regarding this program by clicking Upload Images on the top right corner of the Pre-Approval screen.
- 8) To save for later use, select Save/ Close. To Submit for approval, select Submit.





SUBMITTING EXPENSES - AFTER ATTENDING

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- Log in to Chrome River. Type app.chromeriver.com in your browser url. Enter your universal user ID and the company ID, Northwell. All expenses for continuing education reimbursements are submitted on an expense report.
- CHROMERIVER

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- 2) From the My Dashboard screen, click on the Expense Icon at the top of the page. Select Expense from the drop down box that follows.
- 3) Click on the New Expense Report Icon to go to the expense entry screen.
- 4) Fill out the Report Name Field
 - *i.e. conference name, city, date.*
- 5a) For reimbursement-related reports, click on an expense category on the left (example shows selection of Travel / Transport expense category and related expense types)







Continuing Education Reimbursement via Chrome River

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- 6) Where necessary, enter the date, amount, business purpose and merchant information from the receipt. Assign the expense to a cost center / department by typing in a name or code into the Charge To Allocation box to search.
- 7) Attach receipt images (upload or email to Chrome River via ExpenseMemo@Chromefile.com). Once shown under the receipts tab, drag and drop the image onto its corresponding transaction in order to "Link" it. A paper clip icon will appear. Each transaction over \$25 must have a receipt attached to the line item.
- 8) Attach the pre-approval request if and as required, and submit the report.

Date Amount	03/08/2014 Currency 135.00 USD V		Post Date
Business Purpose	Flight AMA Conference Chicago, IL		
Merchant		Airline	UA-United Airlines
Depart Date	03/08/2014 Return Date 0	3/12/2014 Class	200-Economy 🗸 🔻
From/To	LGA/ORD Ticket # 1	2224554	



