MEETING MINUTES
Wednesday, May 8, 2019  9:00 to 11:00 a.m.  Paul Joyce Faculty & Staff Lounge

I.  Call to Order………………at 9:10 due to technical difficulties……………………Howard
Staff Member of the Month…………………………… Janelle Thomas, Enrollment Services Specialist, Registrar’s Office
As someone at the front desk of the Registrar’s Office, Janelle never knows who will walk through the door or what they will need. She treats everyone with equal respect, and she has a bright, positive attitude that is truly contagious. She is a joy to work with and I appreciate the knowledge and helpfulness she brings to her position……………………Espenschade

II.  Roll Call – Determination of Quorum…………………determined ……………….McGarry

IV.  Approval of Minutes……………………….approved …………………………………………..Howard

V.  Guest Presentations –
    a.  Chrome River Discussion Linda Keeney see Power point New travel and expense software.

VI.  Executive Committee Reports
    a.  Off-Campus...........absent.................................................................Fox
    b.  Communications............newsletter sent, 37% open rate, ideas for stories need to be passed on to the group for possible investigation........................................Hoffmann
    c.  Treasurer................none.................................................................Freitag
    d.  Secretary..............none.................................................................McGarry
    e.  Elections...Thanks for votes on ballots, 6 openings still to fill .......................Crossland
    f.  Technology.........., parking wants a mobile pay app and the ITS committee needs to approve. This is a new governance process goes up to President’s council..Kearney
    g.  Vice Chair......Thanks you for all you do, last month as VC, She has been addressing concerns regarding parking and construction. Be safe and careful, report any concerns that you see.....................................................Baker
    h.  Chair...Also last meeting as chair, and will be the past chair (still goes to exec. Meetings as an advisor) new staff council members are present: Tami Noble and Bruce Lovell, and Misty Evans..............Howard

VII.  Advisory/Other Reports
    a.  Faculty Senators...wrapped up for the year, next year Terry Greib is chair, Barbara Kirchmeier is vice chair, Ann Thompson is retiring, Mostly faculty items, not of much interest to staff...........Tibbals
    b.  PostDocs..............none.................................................................VanLeuven
    c.  HumanResources...Update on CEC: the funds allocation went out to units, back to HR and on to budget office to crunch the numbers. Today at noon meeting with President to overview, after approval, then process goes to electronic letters of appointment. These should go out about the middle of May. Employees will need to acknowledge in Vandal Web. This year goal is to get everyone to 85% of target, some still did not due to budget restraints. All Gen-Ed are at 85% of target or higher. This year will be the year of discussion about merit pay........................................Matthews
    d.  Finance & Administration...........absent..............................................Foisy
    e.  Professional Development & Learning...........none.................................Keim

VIII. Committee Report Outs –
    a.  UBFC: 66 requests reviewed.
    b.  Safety committees: lots of discussions, not much communication between all safety committees.
    c.  Borah committee has planned for upcoming Borah symposium,
    d.  Employee evaluation: merit pay and the streamlined evaluation discussed.
    e.  Join policy committee accumulated data for employee dependent benefits – professional analysis was done to remove bias. When they get data they can make recommendations.
    f.  Review of grievance process – They are trying to get problems solved with an informal process before it
becomes formal. Also, to let staff know what options are.
g. PDL steering committee – required training, banner 9 - culture of safety
h. committee land grant universities 23 recommendations. The goal was to create recommendation to
President. Will do with new president.

IX. Old Business – Employee professional development program approval last meeting – has application process – will
be known Will this be available for this year, or next year? Probably not ready until next fall.

X. New Business
   a. June all-day retreat scheduled for Tuesday June 25, 2019 in the Horizon room in Commons. Rebecca
      Latshaw will be new treasurer, still need an Elections officer, also need someone to do staff council
      member of the month and kudos. What does the best Staff Council look like? Shared Governance,
      great representation, getting engaged, advocating. By-Laws updates. Need feedback from leadership
      and others, We can set goals. New President – how does that work? Financial discussion – how can
      we impact that?

XI. Good of the Order – Thanks to Summer and Patricia for service.

XII. Adjournment - at 10:48 a.m.
University of Idaho
Chrome River Demonstration
One Experience

Chrome River works wherever you are

Mobile (small)  Mobile (large)  Tablet  Laptop
Approvals Anywhere

EMAIL
APPROVALS
Snap and Send:

Starbucks

CHECK 722586
01/21/2016 10:32 AM
2176516  Drawer: 1 Reg: 1

2.10
2.27

$2.10
$0.17
$2.27

Change Due $0.00

Check Closed
01/21/2016 10:32 AM

SBUX Card #6258 New Balance: 30.99
Card is registered.

Join our loyalty program
My Starbucks Rewards
Sign up for promotional offers
Visit Starbucks.com/rewards
Or download our app
At participating stores
Some restrictions apply
# Receipt Uploading

## Electronic Uploading as you Travel

### Email from your device
- Each image will create a separate expense item unless you put the amount and currency in the subject line of the email when you submit it.

## Chrome River SNAP
- Application Instructions on the UI CR web page.

## Uploading Images from the Office
- Images may be emailed
- Uploaded and Attached directly to the Report
- Scanning receipts, emailing or faxing with a cover page identifying the report.

## TYPES OF IMAGES
- ONLY, JPG, PDF, PNG and TIFF files
Emailing

- Receipt to your email
- To receipt@ca1.chromeriver.com
  subject line the dollar amount  125.00
  Attach receipt - send

- Email from one user to another ewallet
- To receipt@ca1.chromeriver.com
  subject:  email address  lkeeney@uidaho.edu
- Attach receipt - send
Who is Eligible for Chrome River

Ability to: Create and enter Reports, upload images, approve pending reports, view Reports and Images.

• Must have an active employment record established on Banner.
• Must have an active Accounts Payable mailing Address.
• If a student or group – must be traveling with an active employee and listed on their Travel Report.
CR Expense Included

- Employee Travel and Expense Payments

- Includes: Travel Reimbursements
  Claim Voucher Employee Reimbursement
  Purchasing Card Travel Expense
  Purchasing Card Purchases

- Can Be submitted on one form or in combination of the forms.

- T- NUMBERS assignments, selected w/in CR
**Terminology**

- **Reports** – Pre-Approval Travel and Travel Expense Reports Non Travel Expense Reports
- **Dashboard** – convenient way to access items
- **eWallet** – digital wallet a secure place to store payment information
- **eReceipts** – a secure place to store receipt images
- **Hamburger icon** – three-lined button in the CR Menu Bar
Key Board Navigation
### Delegates

- Create Report Forms
- Access their Settings Menu Home Screen and Inquiry Reports
- Copies of email for the user
- WILL NOT be able to approve expense or invoices that are routed to the user.
- There are No limits to the number of delegates to a user.

### Approval Delegates

- Temporarily approve Report Forms for another user.
- Acting on their behalf.
- Examples: out of the office, vacations, delegation of work.
- There are NO limits to the number of Approval delegates to a user – However, WILL NOT be able to access the user’s Approval Screen
- While you are not available and have assigned a proxy, you can not be listed as an approver for another user.
Compliance Actions – Error Msg is instant

Warning
• Indicates that **additional information** is required in order to submit the expense report for approvals.
• Alerting to outstanding expenses greater than 60 days.
• Enter the response and resubmit the report.

Violation
• Indicates that the expense **can not** be submitted for approval or payment based on established policies.
• Remove or adjust the expense item before submitting the report.
• If approved by Administration – subject to Payroll withholding.
## Reports - INQUIRY

<table>
<thead>
<tr>
<th>REPORT NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Expense Reports</td>
<td>List of expense reports created within a specified date range</td>
</tr>
<tr>
<td>My Expense Items</td>
<td>List of itemized expenses within a specified date range</td>
</tr>
<tr>
<td>My Delegates</td>
<td>List of people you have entered unsubmitted expenses for</td>
</tr>
<tr>
<td>My Expense Calendar</td>
<td>List of expenses shown in a calendar view</td>
</tr>
<tr>
<td>My Items</td>
<td>List of itemized expenses that were created from offline transactions, cash advances, emailed receipts, mobile transactions and credit card transactions</td>
</tr>
<tr>
<td>My Firm-Paid Items</td>
<td>Itemized list of expense transactions that are paid for by the firm</td>
</tr>
<tr>
<td>My Expense Approvals</td>
<td>Expense items that have been or are your responsibility to approve</td>
</tr>
<tr>
<td>My Paid Expenses</td>
<td>List of expenses that have been paid</td>
</tr>
<tr>
<td>Cash Advance</td>
<td>List of your cash advances</td>
</tr>
<tr>
<td>My Expense Pre-Approvals</td>
<td>Lists all the pre-approvals created by the logged-in user</td>
</tr>
<tr>
<td>My Pre-Approval Approvals</td>
<td>Lists all pre-approvals assigned to an approver in every stage of the approval process: approved, returned and awaiting approval</td>
</tr>
<tr>
<td>My Credit Card Statements</td>
<td>Provides the status of all expense items associated with a credit card statement; if the user has multiple credit cards, the report will automatically group statements by card</td>
</tr>
</tbody>
</table>
Integration with Banner Finance
Recommended Browsers

- **ANDROID MOBILE DEVICES**
  - **Operating System**: Kitkat 4.4.2 or higher
  - **Browser**: Chrome v.51 or higher

- **APPLE MOBILE DEVICES**
  - **Operating System**: iOS 10 or higher
  - **Browser**: Safari 9.1 or higher

- **WINDOWS PC DESKTOP/NOTEBOOK**
  - **Browsers**:
    - Chrome v.51 or higher
    - Internet Explorer 11 or higher
    - Firefox v.33 or higher

- **APPLE DESKTOP/NOTEBOOK**:
  - **Browser**: Safari 9.1 or higher
Contact Information

• Email to contact – crtravel@uidaho.edu

• Web Page -
  https://www.uidaho.edu/finance/controller/accounts-payable/travel-services

• Welcome to Chrome River Travel and Expense!