

Relocation – Preapproval and Expense Report Submission & processing workflow

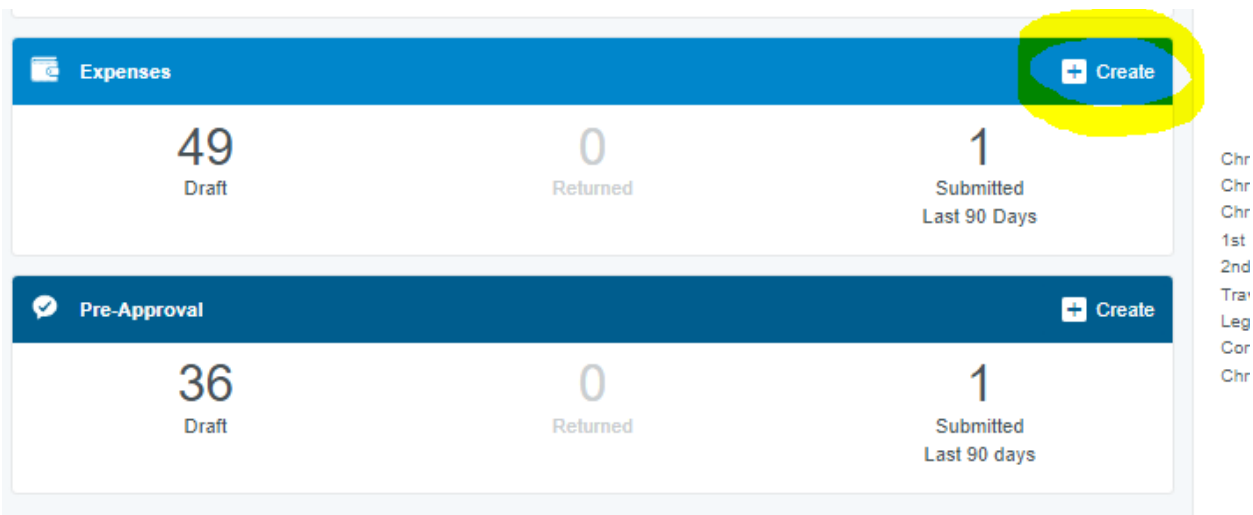
Chrome river Login:

Please login into chrome river Using SSO Link as below

<https://app.chromeriver.com/login/sso/saml?idp=ChromeRiverIND>

1.SUBMISSION OF A NEW PRE-APPROVAL REQUEST:

Employees who are claiming for relocation must submit a Pre-approval request in CR tool before incurring their relocation expenses and based on the approved pre-approval amount associates can plan for their relocation accordingly.



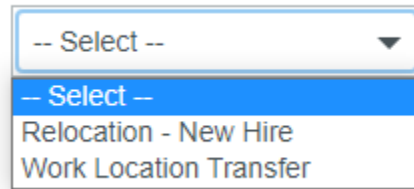
a). Please select the PA Report Type as "Relocation" and fill in the fields as below in the screenshot.

- I. Report Name – "Relocation"
- II. Start and End Date – Relocation Start date and relocation End date.
- III. Business purpose – Please update the business reason.
- IV. PA Report Type – "**Relocation**"
- V. Relocation Type:

- ✓ **Relocation New Hire** – As a new hire, if you are planning to relocate to the work location, then please select type as “**Relocation New Hire**”.
- ✓ **Work location Transfer** – As an internal transfer within the work location (Bangalore, Hyderabad, Gurugram) then associate must select the type as “**Work location Transfer**”.

Relocation Type

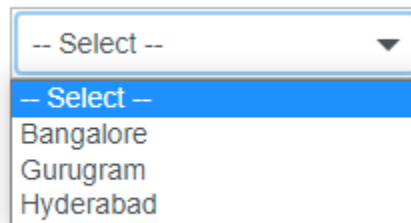
Work Location



- VI. Work location – Please select your work location from the dropdown list as below.

Work Location

Designation Field

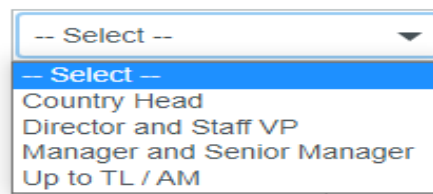


- VII. Please select your designation level from the drop-down list as below.

Designation Field

From Location

Relocation Distance



- VIII. Please update the actual from location place in the field from where you're going to relocate to the work location place.

- IX. Please give the correct relocation Km in the relocation Km field.

- X. Internal transfer Approval from InSyn tool checkbox – Associate should tick this checkbox and upload the InSyn approval attachment screenshot or document if the relocation type is “Work location Transfer”. (This is a mandatory document need to be attached for internal transfer relocation).

- XI. Allocation – please double click on the allocation field to get your cost center in the drop-down list.

Cancel

Save

Pre-Approvals For ..

Report Name

Relocation

Start Date

11/04/2022

End Date

30/04/2022

Number of Days

20

Pay Me In

INR - India Rupees

Business Purpose

Relocation

PA Report Type

Relocation

Relocation Type

Relocation - New Hire

Work Location

Bangalore

Designation Field

Up to TL / AM

From Location

Chennai

Relocation Distance

350

Internal Transfer Approval from Invoice (BCP) Tool is

☐

- b). Request you to select relevant expense tiles towards relocation from the below pre-approval expense types highlighted.

Add Pre-Approval Types

ATED

AIRFARE

HOTEL

MEALS FOR TRAVEL

OTHERS

TAXI/ OTHER TRANSPORTATION

RELOCATION

CAPITATION FEES

ASSET PURCHASE

STAFF WELFARE - TRAINING HR

STAFF WELFARE - TRAINING TOWER

CONVEYANCE

LUNCH/ FOOD TO GOVERNMENT OFFICIALS

STATUTORY PAYMENTS/FEES

OTHER PAYMENTS

Note – Please don't select any expense tiles apart from Relocation and capitation Fee, system will restrict the user to submit the request.

Cancel

Save

Relocation

Estimated Amount

150,000.00

INR

Description

Please give the details accordingly to your relocation.

Distance

999

You can update the estimated amount within the eligibility criteria limit as per the below table.

Entitlement

The following table summarizes the entitlements for inter-city relocations:

Shortest distance of relocation (By air)	Eligibility amount* (max limit in INR)			
	Up to TL/ AM	M/ SMs	Director/ SVP	Country Head
Up to 100 kms	NIL	NIL	NIL	NIL
100 – 999 kms	150,000	200,000	350,000	Up to 10 Lakhs
Over 1000 kms	200,000	250,000	500,000	


* includes coverage for GST to be paid

Note – Tool will restrict the user if you update the amount exceeds the limit as given in the above table.

c). Capitation Fee – Please update the estimated amount and the maximum limit as per policy is INR 65,000.

Cancel

Save



Capitation Fees

Estimated Amount

1.00

INR

Description

Request you to describe about your capitation expenses

Submit Preapproval

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

Cancel

Submit

Approval Workflow for pre-approval Report for relocation type – New Hire:

Employee submitted pre-approval report → HR Team → Respective Manager.

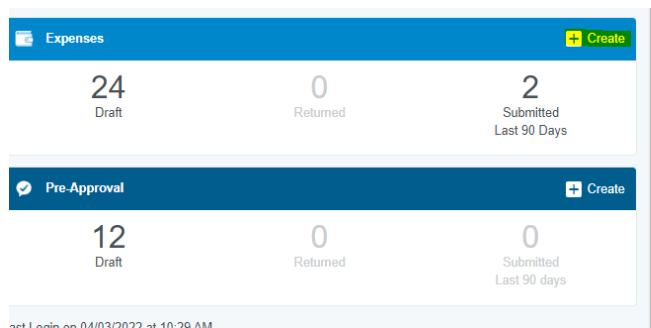
Approval Workflow for pre-approval Report for relocation type – Work location transfer:

Employee submitted pre-approval report → Respective Manager.

2.SUBMISSION OF A RELOCATION EXPENSE REPORT:

Once your pre-approval is approved, you can incur the relocation expenses within the pre-approved limit and after completing the relocation, you can raise an expense report by importing that approved pre-approval along with the actual bills and online payment proof.

On the Home Dashboard, click on CREATE option from the expenses tab to create a **NEW EXPENSE REPORT** as below.



C O N T A C T

Chrome River Technical Support POC	Email
Chrome River Finance Support 1st POC	Email
Chrome River Finance Support 2nd POC	Email
1st Escalation POC	Email
2nd Escalation POC	Email
Travel Help Desk	Email
Legato Corporate Card	Email
Corporate Compliance	
Chrome River Support Phone	
	+91-080-61520153
	+91-080-61520149
	+91-080-61520153
	+91-040-68170355
	Bangalore
	Hyderabad

- I. Please import the approved pre-approval request.
- II. Please give the report name.
- III. Select PA report type as “Relocation”
- IV. Relocation Type:

- ✓ **Relocation New Hire** – As a new hire, if you have relocated to the work location, then please select type as “Relocation New Hire”.
- ✓ **Work location Transfer** – As an internal transfer within the work location (Bangalore, Hyderabad, Gurugram) then associate must select the type as “Work location Transfer”.

- V. Please select your designation level from the drop-down list as below.

Designation Field

From Location

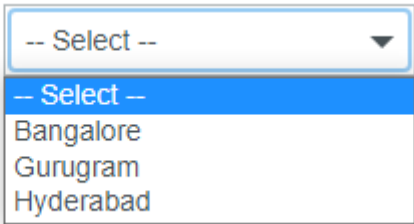
Relocation Distance



- VI. Please update the actual from location place in the field from where you’re relocated to the work location place.
- VII. Business purpose – give the business reason.
- VIII. update the relocated start date and end Date.
- IX. Work location - Please select your work location from the dropdown list as below

Work Location

Designation Field



- X. Give Save to move on the next screen.

Cancel

Save

Expenses For

Import from Pre-Approval

IMPORT PRE-APPROVAL

Report Name

Relocation Report - with Date

Pay Me In

INR - India Rupees

PA Report Type

Relocation

Relocation Type

Relocation - New Hire

Designation Field

-- Select --

From Location

Business Purpose

Start Date

End Date

From Location

-- Select --

Work Location

-- Select --

Please select relevant expense tiles towards relocation from the below expense types highlighted.

Add Expenses

Create New

eWallet

All

Trips

Credit Card

Travel Data

Offline

Personal Account

Authorization

Travel Agency

Recycle Bin

eReceipts

RELOCATION

CAPTATION FEES

BROKERAGE

RELOCATION - TRAVEL

MOVERS AND PACKERS

ACCOMMODATION

MEALS

RELOCATION - AIRFARE

RELOCATION - OTHERS

RELOCATION LAUNDRY

Relocation Travel:

Cancel

Save

Relocation - Travel

Date

11/04/2022

Spent

1.00

INR

Bill Number

ABC1234

Location of Expense Incurred

Bangalore

Description

Describe about relocation

Payment proof is mandatory to be attached for all transactions above Rs. 1,000/-, in absence of which the bill cannot be processed for payment

Allocation


Please update all the field as below.

- Date – Expense incurred date
- Spent – update the expense amount.
- Bill Number – give the invoice number.
- Location – update the location where you have incurred the expenses.


- v) Description – Please describe about all your relocation expenses along with the breakup wise details.
- vi) Double click on the allocation field to get the cost center details in the drop-down list.
- vii) Upload all the original bills along with the online payment proof.

Capitation Fee:


Cancel Save


Capitation Fees

Date

11/04/2022 

Spent

1.00  INR

Business Purpose

Reason

Description


Describe about your capitation fee

Receipt Attached



☒

Allocation

Search for Allocation

 Add Allocation

Attachments (0)

- I. Date – give the expenses incurred date
- II. Spent – update the actual expenses. (Maximum limit is INR 65k as per policy)
- III. Business purpose – please update the business reason
- IV. Description – please describe about your capitation expenses along with the breakup wise details
- V. Receipt attached checkbox – you should tick this checkbox and upload all the original bills towards the capitation expenses along with the payment proof.
- VI. Double click on the allocation field to get the cost center details in the drop-down list and give save to submit the report.

Below are the checkpoints associate must cross verify before submitting the expense report.

- Ensure that all the documents are attached related to your relocation expenses along with the online payment proof like (UPI transaction receipt with your name reflected or bank statement copy towards the expenses).
- Ensure that you are claiming expenses within the approved pre-approval amount and within the relocation eligibility limit as given in the below table.

Shortest distance of relocation (By air)	Eligibility amount* (max limit in INR)			
	Up to TL/ AM	M/ SMs	Director/ SVP	Country Head
Up to 100 kms	NIL	NIL	NIL	NIL
100 – 999 kms	150,000	200,000	350,000	Up to 10 Lakhs
Over 1000 kms	200,000	250,000	500,000	

* includes coverage for GST to be paid

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Add Expenses

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Create New

eWallet

All

Trips

Credit Card

Travel Data

Offline

Personal Account

Authorization

Travel Agency

RELOCATION

CAPITATION FEES

BROKERAGE

RELOCATION - TRAVEL

MOVERS AND PACKERS

ACCOMMODATION

MEALS

RELOCATION - AIRFARE

RELOCATION - OTHERS

RELOCATION LAUNDRY

Complete Confirmation

I hereby certify that all expenses listed here are true and correct to the best of my knowledge and are for legitimate business purposes.

PDF

Cancel

Pre-Approval

Submit

Approval Workflow for Expense Report:

Employee submitted Report → AP Reviewer → Respective Manager for approval → Payment processing.

3. Expense Report Tracking Option

Employees can view the report workflow status by clicking on the tracking option as below.

The screenshot displays the Chromeriver interface. At the top, there's a navigation bar with the Chromeriver logo and a 'Submitted' tab. Below this, a card shows an 'Invoice' for 13/10/2021 with an amount of 3,000.00 INR, marked as 'PENDING'. To the right, buttons for 'Open', 'PDF', 'Tracking' (highlighted with a yellow circle), and 'Recall' are visible. Below the main interface, a detailed view of the 'Tracking for Return to Office - Relocation Reimbursement' workflow is shown. This view includes a table of expense types and a routing steps diagram.

EXPENSE TYPE	AMOUNT (INR)	STATUS	CURRENTLY ASSIGNED
Relocation - Tr...	2,865.00	Pending Approval	APReview:Firmwide
Movers and Pa...		Pending Approval	APReview:Firmwide
		Pending Approval	APReview:Firmwide
Relocation - Tr...		Pending Approval	APReview:Firmwide
Relocation - Tr...	11,645.00	Pending Approval	APReview:Firmwide

Relocation - Travel

Spent Converted: 2,865.00 INR
Amount Spent: 2,865.00 INR
Routing Status: Pending

Routing Steps

1 — 2 — 3

Step Number: 1
Assigned To: APReview: Firmwide

Accinard Date: 05/01/2022 11:02 PM

Note - If the claim status is shown as “Exported” the payments are being initiated with treasury team and waiting for approvals. As on when the approvals are given you would be receiving the payment in 7 to 10 working days from the date of exported. Request you to cross check your bank statement copy accordingly.