

CHROME RIVER PCARD APPROVAL TRACKING STEPS

Cardholder	Delegate	Primary Approver (Budget Approver) (From Banner)	Supervisor Approver (From Banner)	PCard Approver
Submits PCard Reconciliation Reports in Chrome River for CC transaction in their eWallet	Submits PCard Reconciliation Reports in Chrome River for CC transactions in someone else's eWallet	Ensures that funds are available for this request. Ensures PCard transaction on report belong to the allocation listed.	Ensures the PCard report is in support of the UNCG Mission.	Ensures the PCard report is in support of the PCard & Procurement Policies at UNCG.
Uploads PCard Receipts for CC transaction to their eWallet & includes business purpose. (5W's)	Attach PCard Receipts for CC transactions in Someone else's eWallet	Examines PCard report to make sure transactions are in compliance with UNCG Policy. Approvers cannot approve their own transactions.	Approves the PCard Report. If Supervisor is the Primary Budget Approver in Banner this step is skipped.	This step is only triggered if on a compliance rule that is monitored.
Role feeds to Chrome River from Bank of America.	Cardholder must assign Delegate to their Profile. Not created automatically.	The Primary Approver Role is the person designated on the list of authorized index approvers. Business Officers have identified the staff in this role. Role feeds from Banner FTMFund: Financial Manager Field.	Role feeds to Chrome River from HR. A Supervisor could also be the Primary Fund Approver, if so they will only need to approve once.	Role is assigned to team members in the PCard & Procurement Office.
May choose 1 or more delegates within CR to reconcile CC transactions in their eWallet	A person may be a Delegate for Multiple Cardholders	Primary Approvers may assign an Approval delegate to Approve reports that come to them. You may only have 1 Approver Delegate .	Supervisors can assign an Approval delegate to Approve reports that come to them. You may only have 1 Approver Delegate .	Role may not be delegated outside of the Procurement office.