

CHROME RIVER QUICK GUIDE: CREATING A BUSINESS MEAL EXPENSE AND/OR ALCOHOL ONLY EXPENSE

Per the [Business Meal Policy](#), Business Meals are allowable when an individual is conducting official university business at the time of the meal. The university will reimburse based on actual costs incurred up to the allowable per diem limits of the meal location.

Business meals that are conducted during travel status must be requested on the expense report along with other travel related items for reimbursement.

Note: When complete the Expense Report Header Page for business meals:

- **Purpose** – Select Business Meal
- **Travel Type** – Domestic
- **Start and End Dates** – Select the Date of the Business Meal. If requesting multiple business meals- Use the Travel Start Date as the first meal requested and the Travel End Date as the last meal request. For Example: Business Meal request for 6/6/23 and 6/10/23. The Travel Start Date will be 6/6/23 and the Travel End Date will be 6/10/23.
- **Business Purpose** – Provide a specific purpose of the meal
- **Country, City, State** – Select City and State location for the meal

Expenses For Chrome River College of William & Mary

Import from Pre-Approval Optional

Report Name

Pay Me In

Report Type

Non-WM Affiliate Optional

Student Optional

Purpose

Reason Optional

Travel Type

Start Date

End Date

Business Purpose

Travel to more than one location?

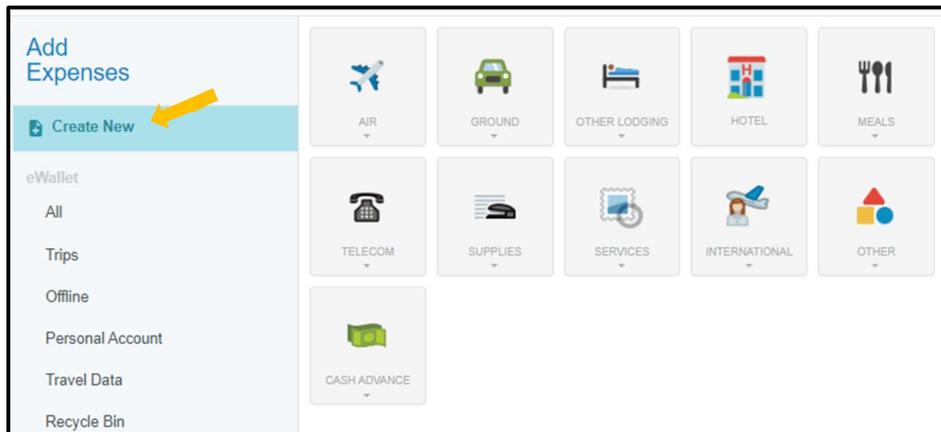
Country 1

State 1

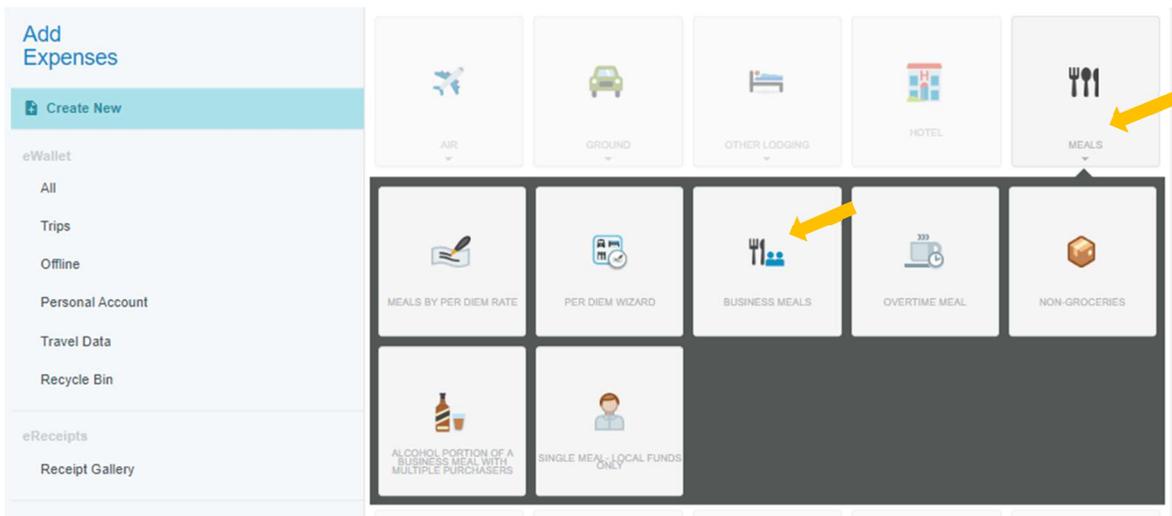
City 1

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1. From the **Add Expenses** window in the applicable expense report, select **CREATE NEW** to access the expense tile.



2. Select **Meals** followed by **Business Meals**.



3. Complete the Business Meal Expense Form as follows:

- **Date** – Select the Date of the Business Meal or Event Date
 - **Amount** – Input the Total Amount of the bill including tax/tip. If alcohol is being requested on a separate receipt, be sure the Amount field includes the full amount of the bill including alcohol receipt.
 - **Business Purpose** – Input the specific business purpose of the meal
 - **Vendor** – Select Restaurant/Prepared Food Establishment, Grocery Shopping, or Both
- Definitions**
- Restaurant/Prepared Food Establishments: Food and beverages purchased from a prepared food establishment or Catering Company
 - Grocery Shopping: Foods and beverages purchased at grocery stores
 - Both- Foods and Beverages purchased at both Restaurants and Grocery stores for the same business meal.
- **Business Meal Type** – Select from the allowable Business Meal Types. See ([Business Meal Policy](#)) for descriptions of each type of allowable meal.
 - **Alcohol (tax/tip)** – If alcohol was a part of the business meal and you want to be reimbursed, input the full amount of alcohol including appropriate tax and tip.

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- **Business Purpose** – Provide a specific purpose of the meal
- **Allocation** – Select the appropriate Index or indexes for the funding of the business meal

4. Click “Calculate” to populate the Per Diem Widget Form.

The screenshot shows the 'Business Meals' form with the following fields and values:

- Date: 06/06/2023
- Amount: 62.00 USD
- Business Purpose: To meet with a potential donor for W&M funding.
- Vendor: Prepared Food Vendor
- Business Meals Type: Business Meals Involving External Parties
- Alcohol Amount (+tax/tip): 0
- Allowable Food Total: 0.00 USD
- Calculate button: highlighted in orange
- Overage Total: 0.00 USD

5. Complete the following fields on the form:

- **Date** – Provide the Date of the business meal
- **Location** – Provide the location of the business meal
- **Meal Type** – Choose Breakfast, Lunch, or Dinner of the business meal
- **Attendees** – Provide the total # of attendees of the business meal
- **Food/Tax field** – Input the subtotal and tax in this field
- **Tip field** – Include the tip amount in this field. Business meals are capped at a maximum 20%.

The 'Calculate Allowable Total' dialog box contains the following information:

- Date: 06/06/2023
- Location: Williamsburg-Williamsburg (city), Virginia (VA), United St...
- Meal Type: Breakfast, Lunch, Dinner
- Attendees: 2
- Summary Table:

Per Attendee	29.00 USD
Base Total	58.00 USD
Allowable Food Total	58.00 USD

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Calculate Overages		SPENT AMOUNT
Food/Tax	<input type="text" value="57.00"/>	57.00
Tip	<input type="text" value="5.00"/>	5.00
Food/Tax (includes 5.00 USD Tax & Tip)		
Spent 62.00 USD of 58.00 USD		
Over 4.00 USD		
Total Spent	62.00 USD	
Total Overages	4.00 USD	

6. When the form has been completed, click **SAVE**.

Note: If the Amount Spent exceeds the Allowable Food Total, compliance warnings will fire in an orange box and provide guidance on additional approvals and requirements.

7. Complete the attendee (guest) information under Internal "Add Guests". Type in the name of the internal guests to add to the expense report. Use the scroll bar to navigate through the list, if necessary. Click on the desired name to select.

Guests (1) ⓘ

Internal Add Guests

Internal

External

Note:

Internal Guests: Only university employees are categorized and listed as Internal guests.

External Guests: Students and Non-WM Affiliates are categorized and listed as External guests.

To complete the External Guest entry, click on the "Internal" option and choose "External".

Guests (1) ⓘ

External Add Guests

Upload CSV

No Results Found

Internal x Chr
Cre
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+ Add New External Guests?

There will be multiple fields to complete for the external guest entry. Please enter the guest's First Name, Last Name, Title and/or Affiliate, and Company Name. Click **ADD**.

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Guests (1) ⓘ

EXTERNAL

First Name	John
Last Name	Doe
Title	Alumnus c/o 1996
Company Name	William & Mary Graduate

Cancel Add

Allocations

If there are multiple allocations for a business meal. You can add each additional allocation and use the percentage field to split by percentage, or the dollar field to input the dollar amount that should be charged to each index.

Allocation

Split Equally Clear Splits

×	W121310 STATE Travel Office	32.26%	20.00
×	V121000 STATE Dean and Director's Office	67.74%	42.00
		100%	62.00

Guest Allocations

The system automatically divides the cost equally among each guest up to 100%. This field should not be adjusted as the system will show the cost per person for the business meal.

Guests (2) ⓘ

External Add Guests

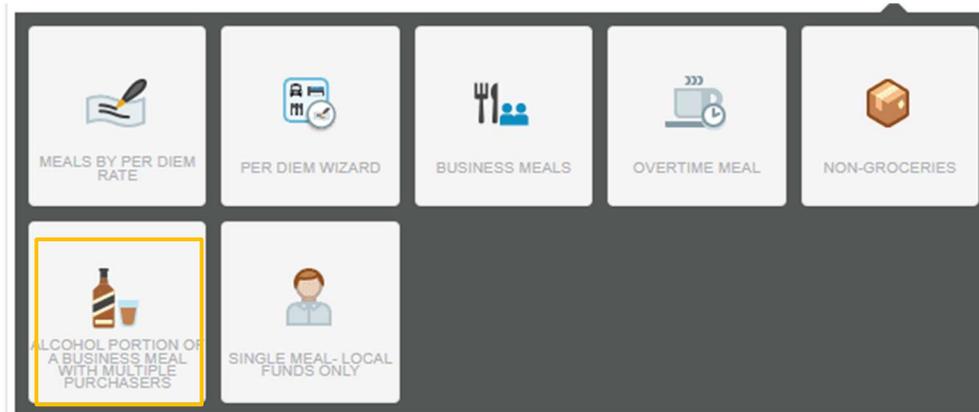
Upload CSV

Internal	×	Chrome River College of William & Mary Creator College of William & Mary	50%	31.00
External	×	John Doe Alumnus c/o 1996 William & Mary Graduate	50%	31.00
			100%	62.00

8. Add the receipts for the business meal by using the "Add Attachment" option or drag and drop the receipts.
9. Click **Save** and **Submit**.

Alcohol Expense Tile in Chrome River

The Alcohol Expense Tile located under **Meals** is **ONLY** used for business meals whereas, the purchases of the food and alcohol are different, but apart of the same business meal. If the meals and alcohol are part of the same purchase for the same event, use the **Business Meal** tile and this one should **NOT** be used.



Example 1: If hosting an event on campus and ATG is used for on campus catering and alcohol is purchased by an employee from a grocery store. This tile should be used to submit the alcohol portion of the business meal for reimbursement.

Example 2: If one employee purchases the meals and another employee purchases the alcohol during a business meal- This tile should be used to reimburse the alcohol portion of the business meal for reimbursement.

Note: To reimburse for alcohol only, there must be food purchased during the business meal. The original meal receipt is required and must be attached to the **Alcohol ONLY** reimbursement.

Complete the following fields on the form:

- **Date** – Provide the Date of the business meal
- **Amount** – Input the total amount of the alcohol including tax and tip.
- **Business Purpose** – Input the specific business purpose of the meal
- **# of Attendees** – Provide the total # of attendees of the business meal
- **Date and Event** – Input the date of the event and the name of the event
- **Allocation** – Select the appropriate local Index or indexes for the funding of the alcohol.

Add receipts and **Save** the entry.

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 **Alcohol Portion of a Business Meal with Multiple Purchasers**

This expense must only be used for business meals when the purchasers of the food and alcohol are different, but are part of the same business meal.

Date 

Amount 

Business Purpose

of Attendees

Date and Event

Allocation

[+ Add Allocation](#) [Presets](#)

Original Meal Receipt Included