

CERTIFY

Travel & Expense Reporting System

November 2018

Presented by:

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Accounts Payable
Supervisor**



CERTIFY

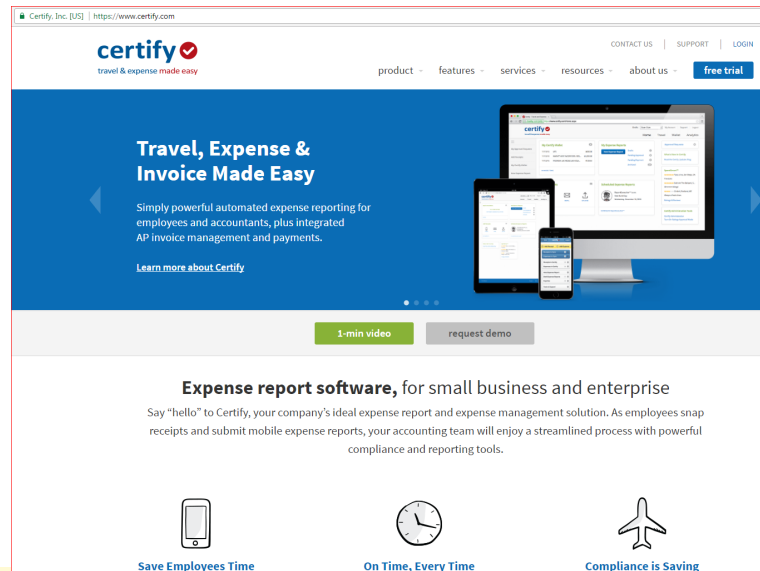
CI's New Travel Booking and Expense Reporting System

BASIC USER

Basic User in Certify is someone with an Employee Role who creates and submits their own expense reports.

Background

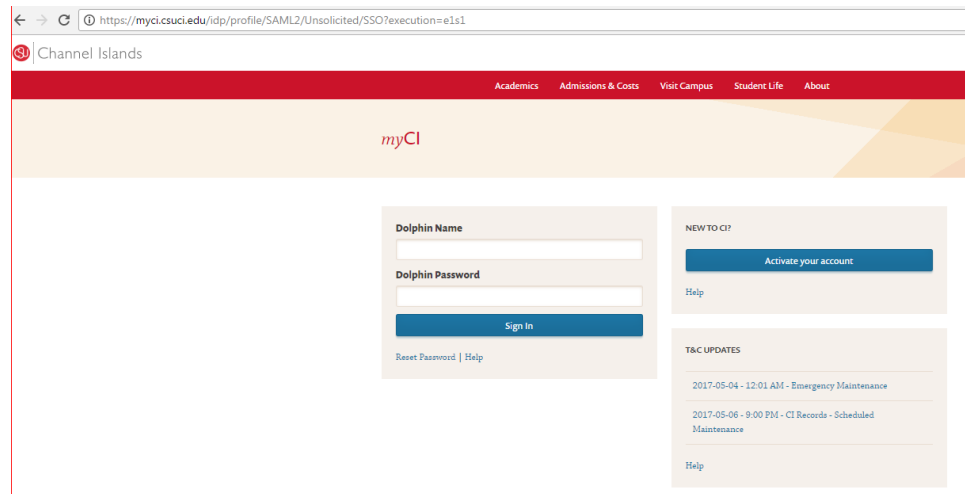
- Certify has been named the new Travel & Expense Management software provider for CSU Channel Islands.
- This new software will allow you to book travel and submit expense reports electronically for a faster turnaround of reimbursement.



Single Sign-on

When using the link, you will be prompted to use your CSUCI credentials to sign in.

<http://go.csuci.edu/travel>



The screenshot shows a web browser window with the URL <https://myci.csuci.edu/idp/profile/SAML2/Unsolicited/SSO?execution=e1s1>. The page header includes the Channel Islands logo and navigation links: Academics, Admissions & Costs, Visit Campus, Student Life, and About. Below the header is a red bar with the text "myCI". The main content area features a login form with fields for "Dolphin Name" and "Dolphin Password", a "Sign in" button, and links for "Reset Password" and "Help". To the right of the login form is a section titled "NEW TO CI?" with an "Activate your account" button and a "Help" link. Below this is a "T&C UPDATES" section with two entries: "2017-05-04 - 12:01 AM - Emergency Maintenance" and "2017-05-06 - 9:00 PM - CI Records - Scheduled Maintenance", each with a "Help" link.

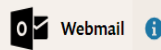
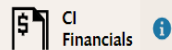
Single Sign-on

e.g., grades, email, parking, etc.

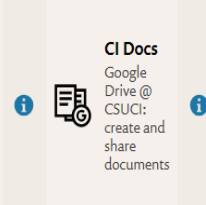
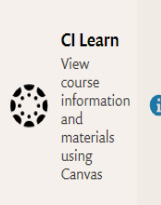
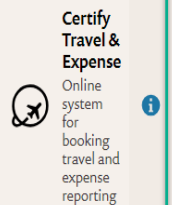
Find myCI Services 🔍

Pinned Services [\(What's this?\)](#)

Edit Pinned



Services

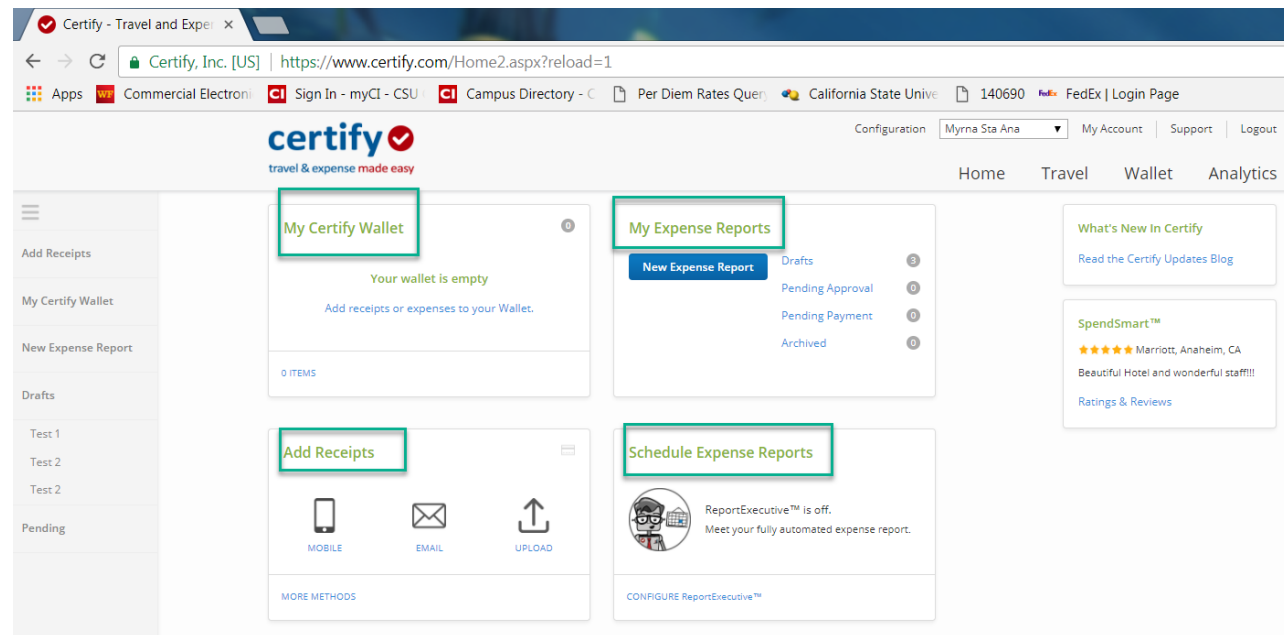


Certify Homepage

This is your **Homepage** in **Certify**.

My Certify Wallet – all receipts and expenses reside here once you have added them into your **Certify account**.

My Expense Report – is where you will start your new expense report when you have expenses in your wallet that you need to submit for approval and reimbursement.



Certify Homepage

Status of your expense report/s

Draft - expenses in progress

Pending Approval – waiting approval from your Manager

Pending Payment - waiting approval from Accounts Payable

Archived – expenses that made it through the full approval process

The screenshot shows the Certify homepage in a web browser. The browser's address bar displays the URL <https://www.certify.com/Home2.aspx?reload=1>. The page header includes the Certify logo and navigation links for Home, Travel, Wallet, and Analytics. The main content area is divided into several sections: 'My Certify Wallet' (empty), 'My Expense Reports' (highlighted with a green box), 'Add Receipts' (with mobile, email, and upload options), and 'Schedule Expense Reports' (with a ReportExecutive™ status message). The 'My Expense Reports' section lists four categories: Drafts, Pending Approval, Pending Payment, and Archived, each with a corresponding icon and a count of zero items. The 'Add Receipts' section includes icons for mobile, email, and upload, along with a 'MORE METHODS' link. The 'Schedule Expense Reports' section features a ReportExecutive™ status message and a 'CONFIGURE ReportExecutive™' link. The right sidebar contains 'What's New In Certify' and 'SpendSmart™' sections.

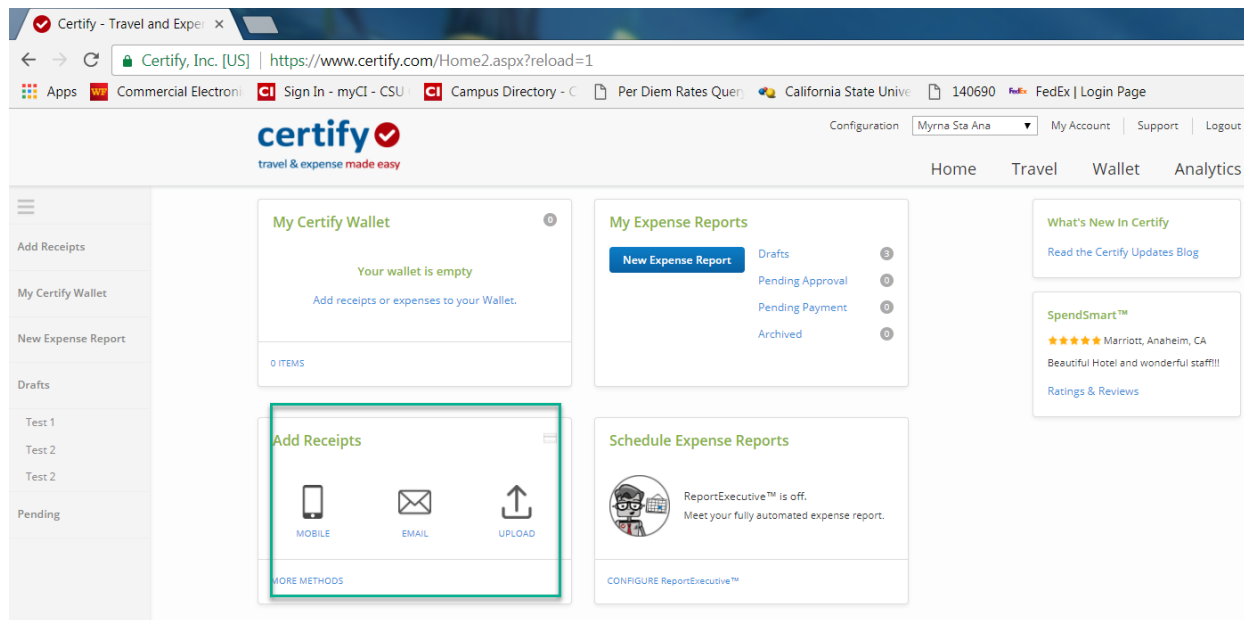
Certify Homepage

Add Receipts – Three ways to add receipts into Certify

Mobile - download Certify App

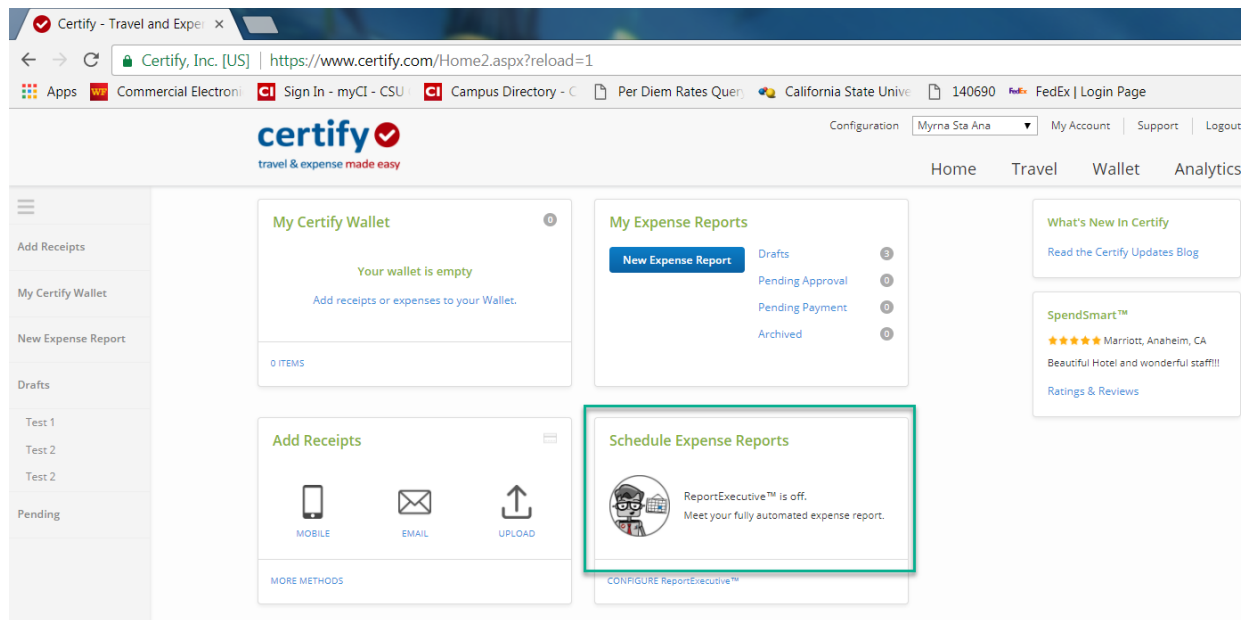
Email – email your receipt to receipts@certify.com

Upload – upload a picture of your receipt to your computer



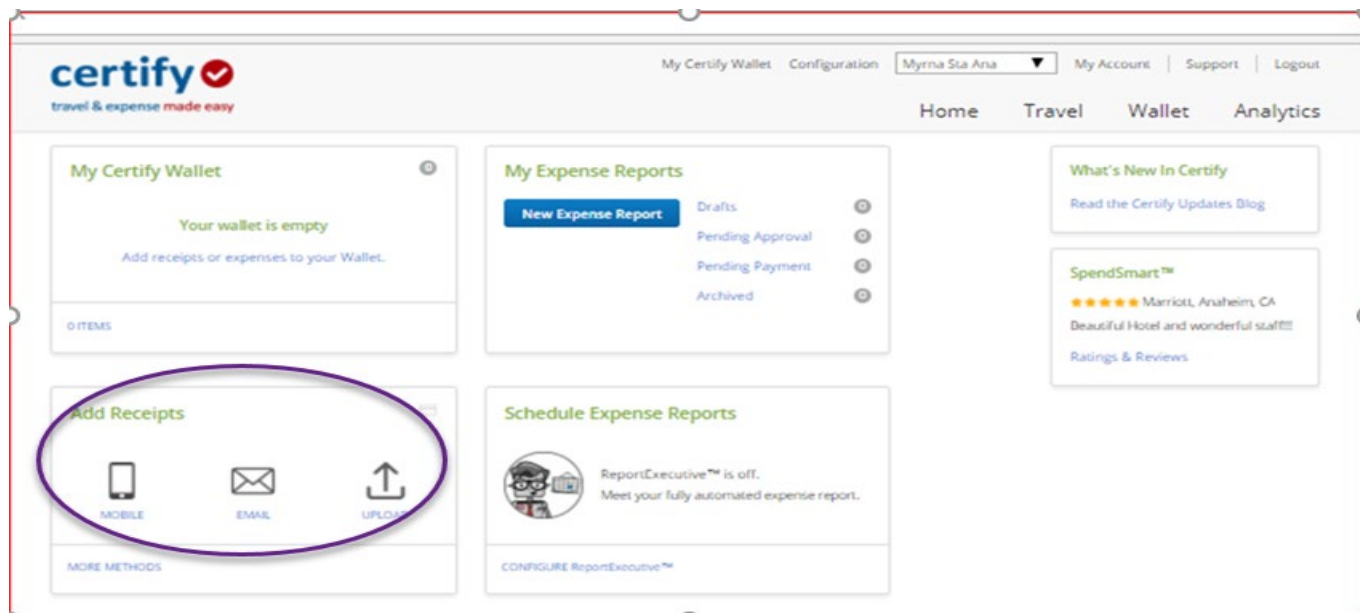
Certify Homepage

Schedule Expense Reports – auto create an expense report.



Method of Adding Receipts to your Wallet

- **Uploading Receipts** – directly to your computer
- **Emailing Receipts** – emailing receipts to receipts@certify.com
- **Adding Receipts Using Certify Mobile** – taking photo of receipt

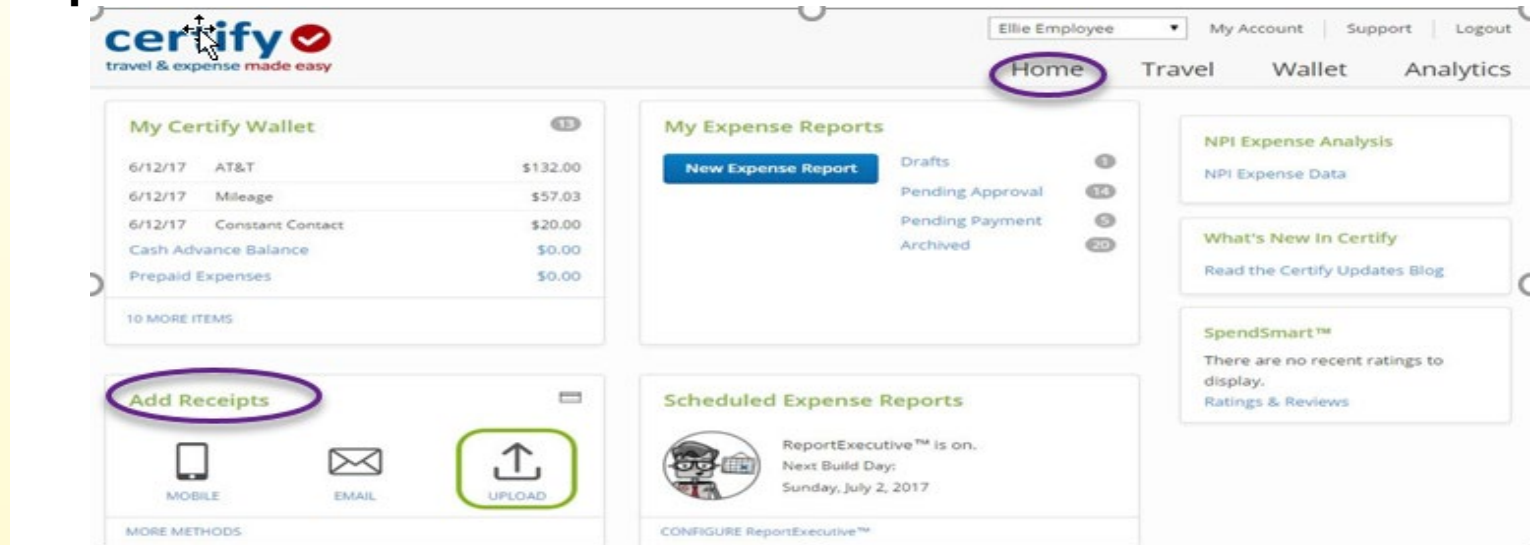


Add Receipts - Upload

- **Uploading Receipts**

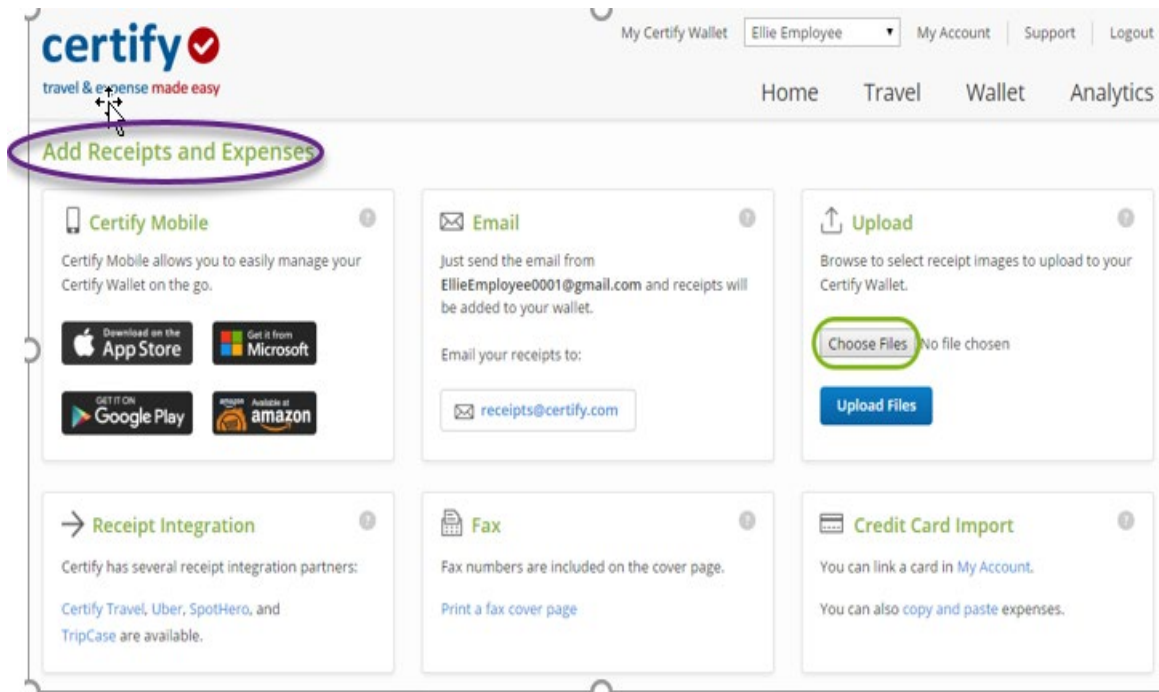
A quick and convenient method for adding receipt images to your **Certify Wallet** is to upload receipt image files from your computer. Image uploads can be up to 10 MB in size. You can choose to upload one at a time, or add multiple receipt images at once.

Step I- On your Certify account **Homepage**, under **Add Receipts**, click **Upload**.



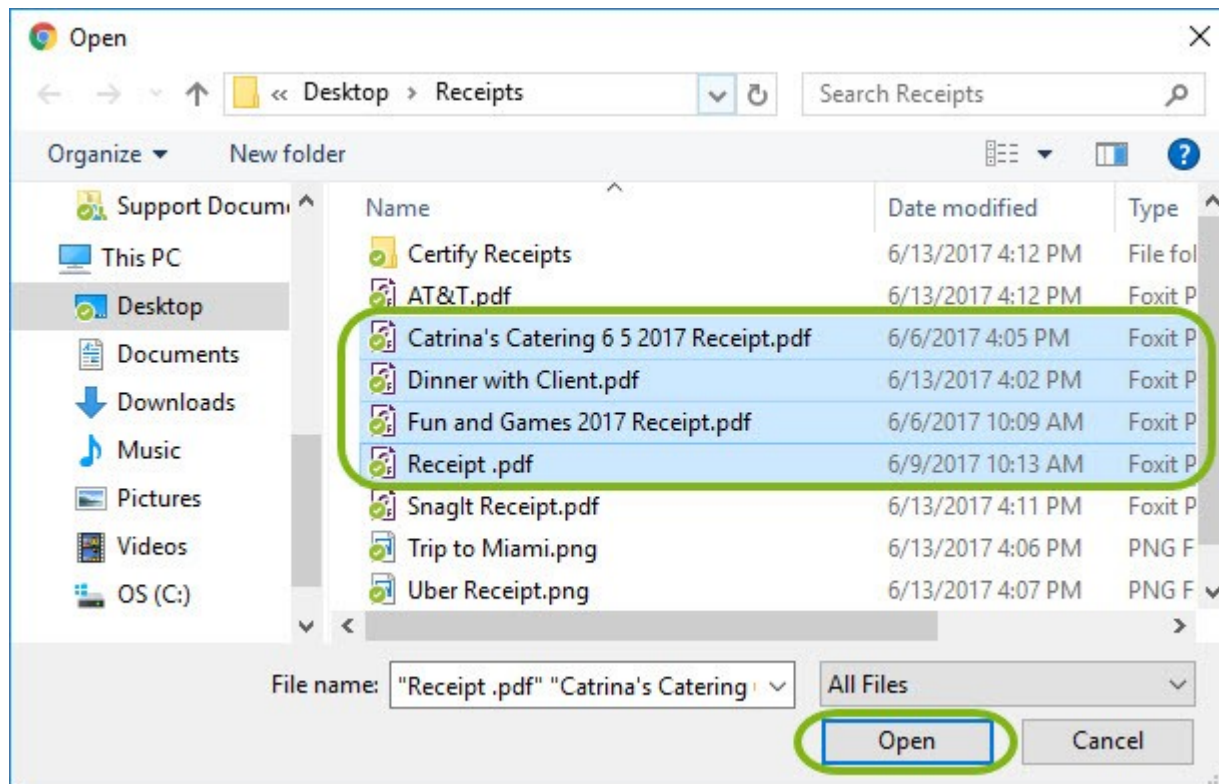
Add Receipts - Upload

Step 2: On the **Add Receipts and Expenses** page, select **Choose Files**.



Add Receipts - Upload

Step 3: Select the receipt images from your computer. Click Open once you have selected all the receipt images you want to upload.



Add Receipts - Upload

Step 4: The number of receipt images selected is indicated next to **Choose Files**. Click **Upload Files** to add the receipt images to your **My Certify Wallet**.

The screenshot shows the Certify web application interface. At the top, the Certify logo is on the left, and navigation links for 'My Certify Wallet', 'Ellie Employee' (with a dropdown arrow), 'My Account', 'Support', and 'Logout' are on the right. Below this is a secondary navigation bar with 'Home', 'Travel', 'Wallet', and 'Analytics'. The main section is titled 'Add Receipts and Expenses' and contains three cards:

- Certify Mobile:** Describes the mobile app and includes download links for the App Store, Microsoft, Google Play, and Amazon.
- Email:** Instructs the user to email receipts from 'EllieEmployee0001@gmail.com' to 'receipts@certify.com'.
- Upload:** Allows the user to browse and upload receipt images. It shows a 'Choose Files' button followed by '4 files', with a green arrow pointing to this text. Below this is a blue 'Upload Files' button, which is highlighted with a green circle.

Add Receipts - Upload

The receipts have now been added to your **My Certify Wallet**. Uploaded receipts display in the **Upload** icon in the **Source** column.

The **Upload** feature uses Receipt Parse, which scans the receipt image and can pre-populate the Vendor, Category/Details and Amount fields for you. If you need to make additions or edits to those fields, you can manually change them by clicking the Source Upload icon, click **Edit Item** button, enter or correct the missing item/s and save.

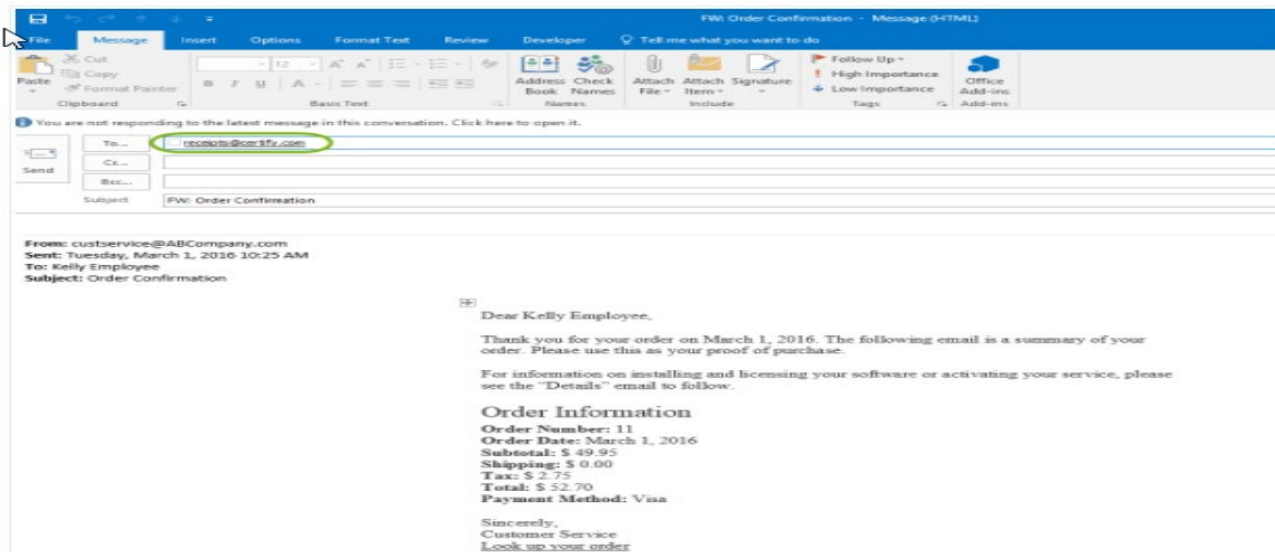
	Source	Receipt	Date	Category/Details	Vendor	Description	Amount
			5/29/2017	Meals	Bubble Maineia	Bubble Maineia.jpg	\$4.78
			6/6/2017	Meals	Green Elephant	Brain storm lunch	\$17.98
			6/9/2017	Meals	Aurora	Aurora Provisions.jpg	\$11.12
			6/6/2017	Staff Entertaining	Fun & Games	Fun and Games 2017 Receipt.pdf	\$150.00
			6/6/2017	Staff Entertaining	Catrina's Catering	Catrina's Catering 6 5 2017 Receipt.pdf	\$435.00
			6/9/2017	Printing	Paper Patch	Receipt .pdf	\$25.00
			6/13/2017	Meals	Restaurant 121	Dinner with Client.pdf	\$248.40
			6/5/2017	Computer Hardware	Computer Gurus	Receipt from Client	\$212.00
			6/1/2017	Mileage		Certify_MapIt.jpg	\$57.03

9 ITEMS

Add Receipts – Emailing

- Emailing Receipts

Step 1: Using your CI Email (not your personal email), in the To field, enter receipts@certify.com. Then in the subject line, enter the receipt name.



Add Receipts - Emailing

Step 2: Attaching your receipts to the email: Any number of receipts may be attached, however, the total size of the email (including any text and signatures) must be under 4 MB. Certify will accept all popular image file types such as jpg, gif, bmp, pdf, tiff, etc. Click **Send**.

When Certify receives the email with your receipt or expense data, the data is automatically parsed and added to your Certify Wallet.

The screenshot displays four panels from the Certify application interface:

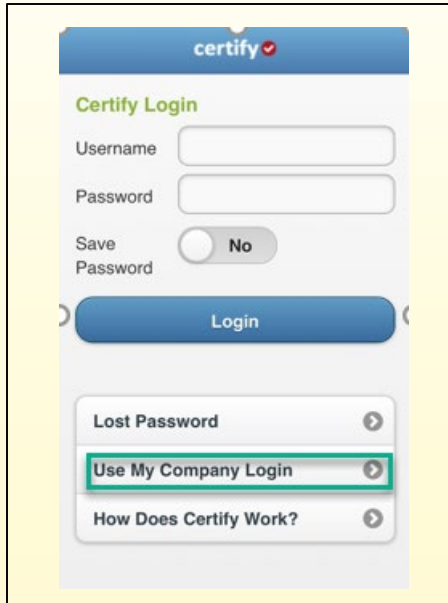
- My Certify Wallet:** Shows a single receipt entry for 3/1/16 from ABCCompany for \$52.70. A green circle highlights this entry. Below the list, it says "1 ITEM".
- My Expense Reports:** Features a blue "New Expense Report" button and a list of report statuses: Drafts (2), Pending Approval (0), Pending Payment (0), and Archived (22).
- Add Receipts:** Offers three methods to add receipts: MOBILE (with a smartphone icon), EMAIL (with an envelope icon), and UPLOAD (with an upward arrow icon). A "MORE METHODS" link is at the bottom.
- Scheduled Expense Reports:** Includes a cartoon character icon and text stating "ReportExecutive™ is on. Next Build Day: Wednesday, November 9, 2016". A "CONFIGURE ReportExecutive™" link is at the bottom.

Add Receipts – Certify Mobile

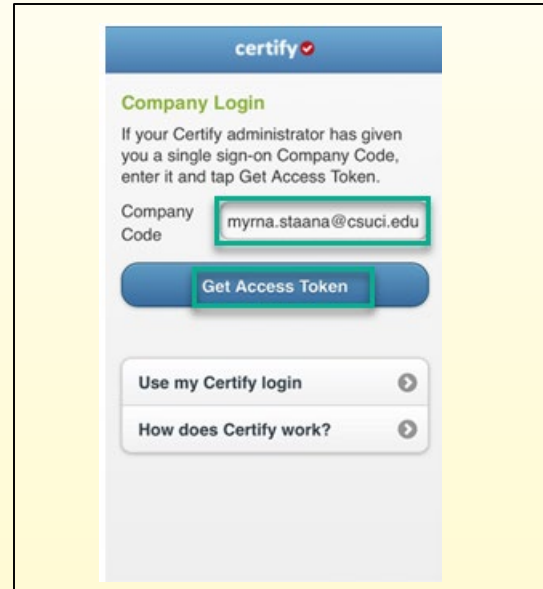
- **Adding Receipts using Certify Mobile**

You can use the Certify Mobile app to easily upload receipts to your My Certify Wallet from your mobile device. The Certify Mobile app works with most devices including Windows Phone, Android, BlackBerry and iPhone.

Step 1: Open the Certify Mobile app on your mobile device. Tap **Use My Company Login**. Type your **CI email address** under **Company Code**. Tap **Get Access Token**



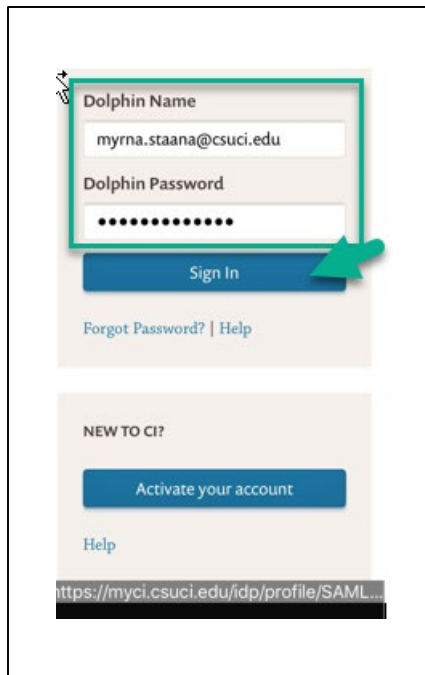
The screenshot shows the 'certify' app interface with a blue header. Under the 'Certify Login' section, there are fields for 'Username' and 'Password', a 'Save Password' toggle set to 'No', and a 'Login' button. Below these, there are three links: 'Lost Password', 'Use My Company Login' (highlighted with a green box), and 'How Does Certify Work?'.



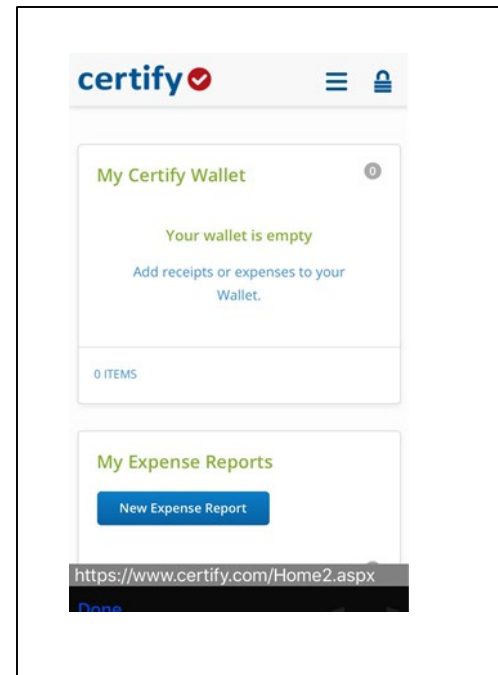
The screenshot shows the 'Company Login' screen. It includes a blue header, a title 'Company Login', and explanatory text: 'If your Certify administrator has given you a single sign-on Company Code, enter it and tap Get Access Token.' Below this is a 'Company Code' field containing 'myrna.staana@csuci.edu' (highlighted with a green box) and a 'Get Access Token' button (also highlighted with a green box). At the bottom, there are two links: 'Use my Certify login' and 'How does Certify work?'.

Add Receipts – Certify Mobile

Step 2: Sign-in to your CI login account. The next screen will bring you to your Certify mobile home screen.



The screenshot shows the Certify login interface. At the top, there's a 'Dolphin Name' field containing 'myrna.staana@csuci.edu' and a 'Dolphin Password' field with masked characters. Below these is a blue 'Sign In' button, which is highlighted by a green arrow. Underneath the 'Sign In' button are links for 'Forgot Password?' and 'Help'. Further down, there's a section for 'NEW TO CI?' with an 'Activate your account' button and another 'Help' link. At the bottom, a URL is visible: 'https://myci.csuci.edu/idp/profile/SAML...'



The screenshot shows the Certify mobile home screen. At the top, there's a header with the 'certify' logo and a lock icon. Below the header, there's a 'My Certify Wallet' section with a message 'Your wallet is empty' and a link to 'Add receipts or expenses to your Wallet'. Below this is a section for 'My Expense Reports' with a 'New Expense Report' button. At the bottom, a URL is visible: 'https://www.certify.com/Home2.aspx'.

Add Receipts –Certify Mobile

Step 2a: On your Certify Mobile home screen, tap **Add Receipt**.



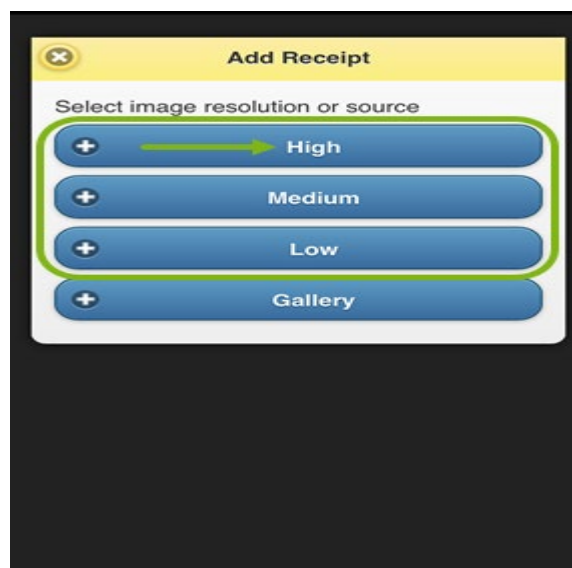
Add Receipts –Certify Mobile

Step 3: Select a photo resolution to open the camera screen on your mobile device.
Photo resolution options include:

High / Medium – Recommended

Low – Use only if your device is short on storage

Gallery – Use to add a receipt image from your mobile device's photo gallery



Add Receipts –Certify Mobile

Step 4: Open the camera screen. Hold your camera 6 to 12 inches away and focus the camera screen on your receipt. Make sure the receipt fills the screen. Once the receipt looks clear and centered, tap the Photo button to capture the receipt image.



Add Receipts –Certify Mobile

Step 5: On the next screen, tap **Use Photo** to save the receipt image.



Add Receipts –Certify Mobile

Step 6: On the next screen, tap **AutoFill** to scan the receipt image and populate the expense detail fields.

The screenshot shows the 'Enter Expense' screen in the Certify Mobile app. At the top, there is a blue header bar with 'Cancel' and 'Save' buttons, and the 'certify' logo. Below the header, the title 'Enter Expense' is displayed in green. A receipt image placeholder is shown next to a yellow 'AutoFill' button. Below the receipt, there are several input fields: 'Date' (Jun 9, 2017), 'Department' (General & Admin), 'Category' (Airfare), 'Amount' (empty), 'Carrier' (empty), 'From' (empty), 'To' (empty), 'Reason' (empty), 'Reimbursable' (Yes), and 'Billable' (No).

Add Receipts –Certify Mobile

Step 7a: If needed, make edits to the expense data by tapping the field you want to edit, click arrow (v) by entering Category/Fund/Project etc. To finish tap **Done**.

This screenshot shows the 'Enter Expense' form in the Certify Mobile app. The form has a blue header with 'Cancel', 'certify', and 'Save' buttons. Below the header, there is a green title 'Enter Expense' and a yellow 'AutoFill' button. The form contains several input fields: 'Receipt' (with a placeholder image), 'Date' (Feb 7, 2018), 'Department' (920101 - Fiscal S), 'Category' (606001 - Meals (In State)), 'Amount' (34.55 USD), 'Business Unit' (dropdown), 'Fund' (search text), 'Program' (search text), and 'Project' (dropdown). The 'Category' field is highlighted with a green box.

This screenshot shows the 'Done' button and a list of categories in the Certify Mobile app. The 'Done' button is highlighted with a green box. Below it, a list of categories is shown, with '606001 - Meals (In State)' highlighted by a green box. The list includes: '606001 - Lodging (In State)', '606001 - Lodging Taxes and Fe...', '606001 - Lodging with Friends (...)', '606001 - Meals (In State)', '606001 - Mileage (In State)', and '606001 - Santa Rosa Transport Shuttle (In State)'.

Add Receipts –Certify Mobile

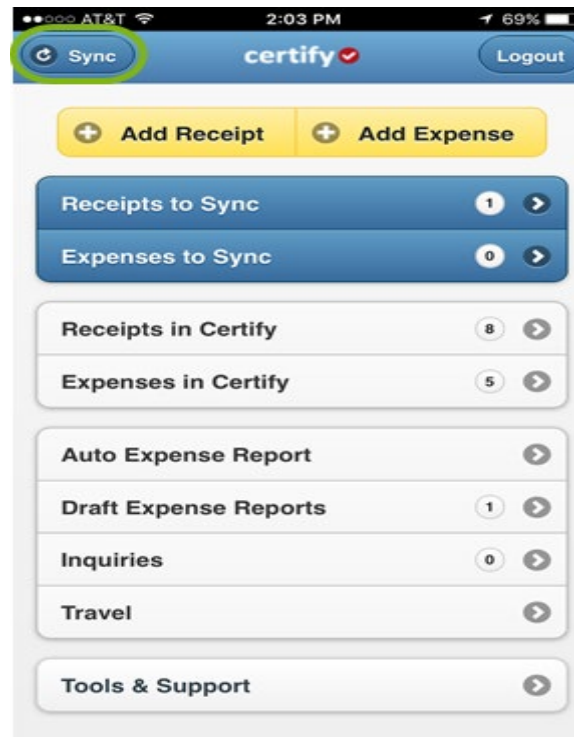
Step 7b: Tap **Save** to finish.

The screenshot shows the 'Add Receipts' form in the Certify Mobile app. The form includes the following fields and options:

- Business Unit:** CICMP - CSU Channel Islands
- Fund:** GD901 - CI ~ Op€
- Program:** search text
- Project:** (dropdown menu)
- Vendor:** (text input field)
- Location:** (text input field)
- Attendees:** Me
- Reason:** (text input field)
- Reimbursable:** Yes (toggle switch)
- Policy:** Meets Policy (checkbox checked)
- Buttons:** A blue bar at the bottom contains a '+' button, a 'Save' button (highlighted with a green box), and a 'Cancel' button.

Add Receipts –Certify Mobile

Step 8: On your Certify Mobile home screen, tap **Sync** to upload the receipt and add it to your **My Certify Wallet**.



Certify Wallet

You can add and manage your receipts and expenses using the **Certify Wallet**. You can store your receipts and expenses in My Certify Wallet until you are ready to create your expense report. To view more items on your wallet select **More Items** under **My Certify Wallet**.

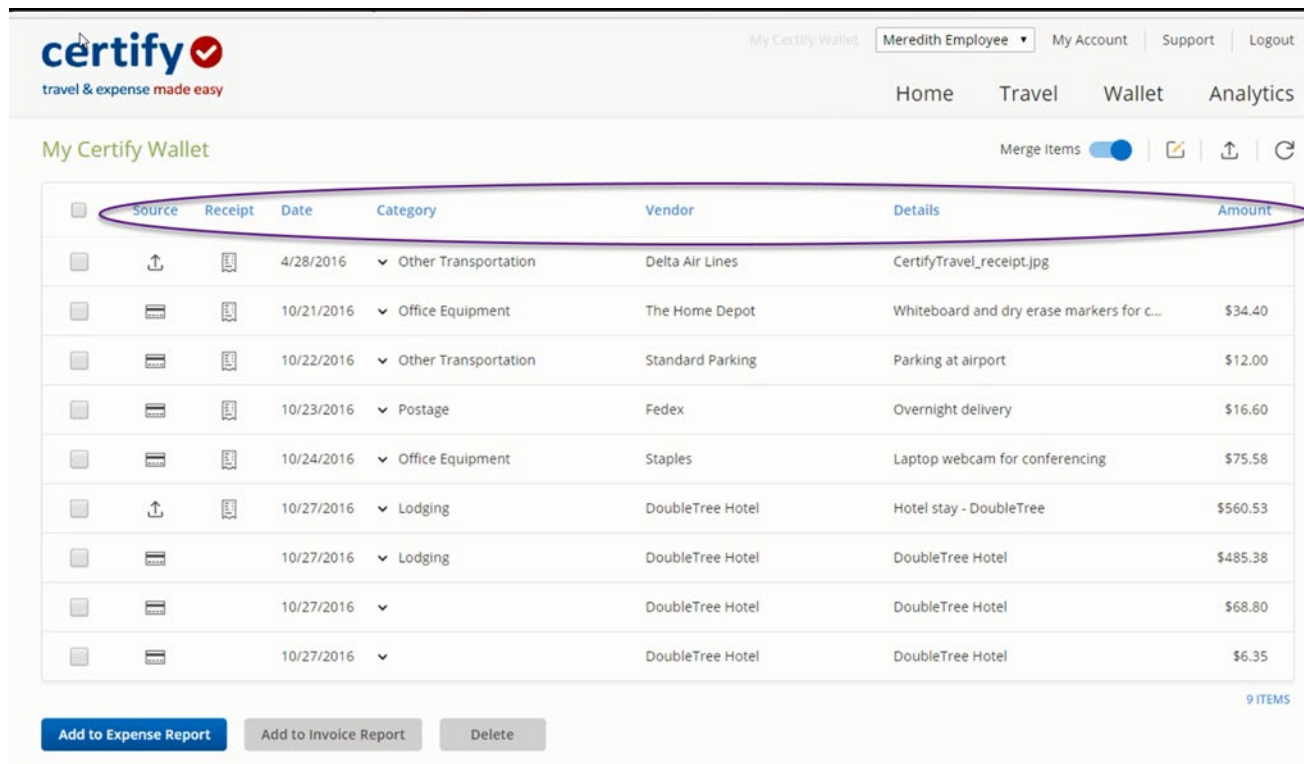
The screenshot displays the Certify Wallet interface. At the top, the Certify logo is on the left, and navigation links for 'My Certify Wallet', 'Meredith Employee', 'My Account', 'Support', and 'Logout' are on the right. Below the navigation bar, there are tabs for 'Home', 'Travel', 'Wallet', and 'Analytics'. The main content area is divided into several sections. The 'My Certify Wallet' section is highlighted with a red box and contains a table of expenses:

Date	Description	Amount
10/27/16	DoubleTree Hotel	\$560.53
10/27/16	DoubleTree Hotel	\$485.38
10/27/16	DoubleTree Hotel	\$68.80




Below the table, a link labeled '6 MORE ITEMS' is circled in purple. To the right of the 'My Certify Wallet' section is the 'My Expense Reports' section, which includes a 'New Expense Report' button and a list of report statuses: Drafts (1), Pending Approval (1), Pending Payment (0), and Archived (5). Further right is the 'What's New In Certify' section with a link to 'Read the Certify Updates Blog'. Below the 'My Certify Wallet' section is the 'Add Receipts' section, which features icons for 'MOBILE', 'EMAIL', and 'UPLOAD', along with a 'MORE METHODS' link. To the right of the 'Add Receipts' section is the 'Schedule Expense Reports' section, which includes a message about 'ReportExecutive™ is off' and a 'CONFIGURE ReportExecutive™' link.
















Certify Wallet

Once the “More Items” is selected all receipts and expenses that have been uploaded and sync to your wallet will be shown. The wallet includes the **Source, Receipt, Date, Category, Vendor, Details and Amount.**



My Certify Wallet

Merge Items ☒   

	Source	Receipt	Date	Category	Vendor	Details	Amount
<input type="checkbox"/>			4/28/2016	▼ Other Transportation	Delta Air Lines	CertifyTravel_receipt.jpg	
<input type="checkbox"/>			10/21/2016	▼ Office Equipment	The Home Depot	Whiteboard and dry erase markers for c...	\$34.40
<input type="checkbox"/>			10/22/2016	▼ Other Transportation	Standard Parking	Parking at airport	\$12.00
<input type="checkbox"/>			10/23/2016	▼ Postage	Fedex	Overnight delivery	\$16.60
<input type="checkbox"/>			10/24/2016	▼ Office Equipment	Staples	Laptop webcam for conferencing	\$75.58
<input type="checkbox"/>			10/27/2016	▼ Lodging	DoubleTree Hotel	Hotel stay - DoubleTree	\$560.53
<input type="checkbox"/>			10/27/2016	▼ Lodging	DoubleTree Hotel	DoubleTree Hotel	\$485.38
<input type="checkbox"/>			10/27/2016	▼	DoubleTree Hotel	DoubleTree Hotel	\$68.80
<input type="checkbox"/>			10/27/2016	▼	DoubleTree Hotel	DoubleTree Hotel	\$6.35

9 ITEMS

[Add to Expense Report](#) [Add to Invoice Report](#) [Delete](#)



Channel Islands
CALIFORNIA STATE UNIVERSITY

Certify Wallet

The **Source** column shows how these receipts enter your wallet. To view the receipt image, click the **view icon**.

The screenshot displays the Certify Wallet interface. At the top, the Certify logo and tagline "travel & expense made easy" are visible. Below this, the "My Certify Wallet" section shows a list of transactions. Each transaction row includes a checkbox, a "Source" column (with a circled icon), and a "Receipt" column (with a circled icon). A "Receipt Image" modal window is open, showing a receipt from Home Depot. The receipt details include the store name, address, date, time, and a list of items purchased with their prices. The total amount is \$34.40. Below the receipt image, there are search and refresh icons. At the bottom of the interface, there are three buttons: "Add to Expense Report", "Add to Invoice Report", and "Delete".

Source	Receipt
10/27/2016	DoubleTree Hotel
10/27/2016	DoubleTree Hotel

Buttons: Add to Expense Report, Add to Invoice Report, Delete

Certify Wallet

To delete receipts and expenses, select the item and click delete.

The screenshot displays the Certify Wallet interface. At the top, the Certify logo is on the left, and navigation links for 'My Certify Wallet', 'Meredith Employee', 'My Account', 'Support', and 'Logout' are on the right. Below the navigation bar, there are tabs for 'Home', 'Travel', 'Wallet', and 'Analytics'. The 'Wallet' tab is active, showing a list of expenses. The list has columns for 'Source', 'Receipt', 'Date', 'Category', 'Vendor', 'Details', and 'Amount'. One item, 'Other Transportation' from 'Standard Parking' dated 10/22/2016, is selected, indicated by a green box around the checkbox. A 'Confirmation' dialog box is overlaid on the list, asking 'Are you sure you want to delete the selected items?'. The 'Yes' button in the dialog is highlighted with a green box. At the bottom of the interface, there are buttons for 'Add to Expense Report', 'Add to Invoice Report', and 'Delete'. The 'Delete' button is also highlighted with a green box.

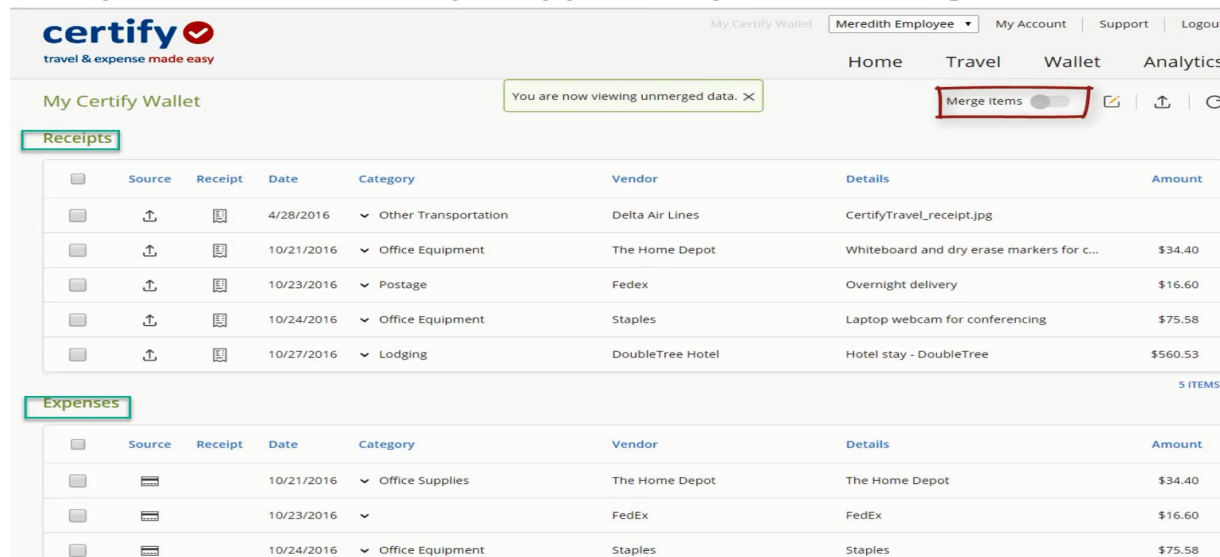
Source	Receipt	Date	Category	Vendor	Details	Amount
		4/28/2016	Other Transportation	Delta Air Lines	CertifyTravel_receipt.jpg	
		10/21/2016	Office Equipment	The Home Depot	Whiteboard and dry erase markers for c...	\$34.40
<input checked="" type="checkbox"/>		10/22/2016	Other Transportation	Standard Parking	Parking at airport	\$12.00
		10/23/2016	Postage		Overnight delivery	\$16.60
		10/24/2016	Office Equipme		Laptop webcam for conferencing	\$75.58
		10/27/2016	Lodging		Hotel stay - DoubleTree	\$560.53
		10/27/2016	Lodging		DoubleTree Hotel	\$485.38
		10/27/2016		DoubleTree Hotel	DoubleTree Hotel	\$68.80
		10/27/2016		DoubleTree Hotel	DoubleTree Hotel	\$6.35

9 ITEM

Buttons: Add to Expense Report, Add to Invoice Report, Delete

Certify Wallet

The **Merge Items** is just a visual aid that categorizes receipts and expense together and/or separately. With **Merge off** (shown below) receipts and expenses are shown separately in your wallet. With **Merge on** receipts and expenses are listed in date order. Note: After using a receipt or expense in an expense report it will no longer appear in your **Certify Wallet**.



The screenshot displays the Certify Wallet interface for Meredith Employee. The 'Merge Items' toggle is set to 'off', indicated by a red box. The interface shows two sections: 'Receipts' and 'Expenses'. The 'Receipts' section contains a table with 6 items, and the 'Expenses' section contains a table with 3 items. A notification at the top states 'You are now viewing unmerged data.'.

Source	Receipt	Date	Category	Vendor	Details	Amount
		4/28/2016	Other Transportation	Delta Air Lines	CertifyTravel_receipt.jpg	
		10/21/2016	Office Equipment	The Home Depot	Whiteboard and dry erase markers for c...	\$34.40
		10/23/2016	Postage	Fedex	Overnight delivery	\$16.60
		10/24/2016	Office Equipment	Staples	Laptop webcam for conferencing	\$75.58
		10/27/2016	Lodging	DoubleTree Hotel	Hotel stay - DoubleTree	\$560.53

5 ITEMS

Source	Receipt	Date	Category	Vendor	Details	Amount
		10/21/2016	Office Supplies	The Home Depot	The Home Depot	\$34.40
		10/23/2016		FedEx	FedEx	\$16.60
		10/24/2016	Office Equipment	Staples	Staples	\$75.58

Create and Submit Expense Reports

Now that you have added receipts and expenses, you are ready to create and submit expense report for approval. To get started, on your browser. Type in <http://go.csuci.edu/travel> you will be prompted to use your CSUCI credentials to sign in to Certify.

Under **My Expense Reports**, click **New Expense Report**

The screenshot displays the Certify web application interface. At the top, the 'certify' logo is on the left, and navigation links for 'My Certify Wallet', 'Meredith Employee', 'My Account', 'Support', and 'Logout' are on the right. Below the navigation bar, there are four main sections: 'My Certify Wallet' (showing a list of transactions), 'My Expense Reports' (with a 'New Expense Report' button highlighted in a red box), 'Add Receipts' (with icons for mobile, email, and upload), and 'Schedule Expense Reports' (with a message about ReportExecutive being off). On the right side, there are two additional sections: 'What's New In Certify' and 'SpendSmart™'.

My Certify Wallet		
10/27/16	DoubleTree Hotel	\$560.53
10/27/16	Hotel stay - DoubleTree	
10/24/16	Staples	\$75.58
6 MORE ITEMS		

My Expense Reports	
New Expense Report	1
Drafts	1
Pending Approval	0
Pending Payment	0
Archived	0

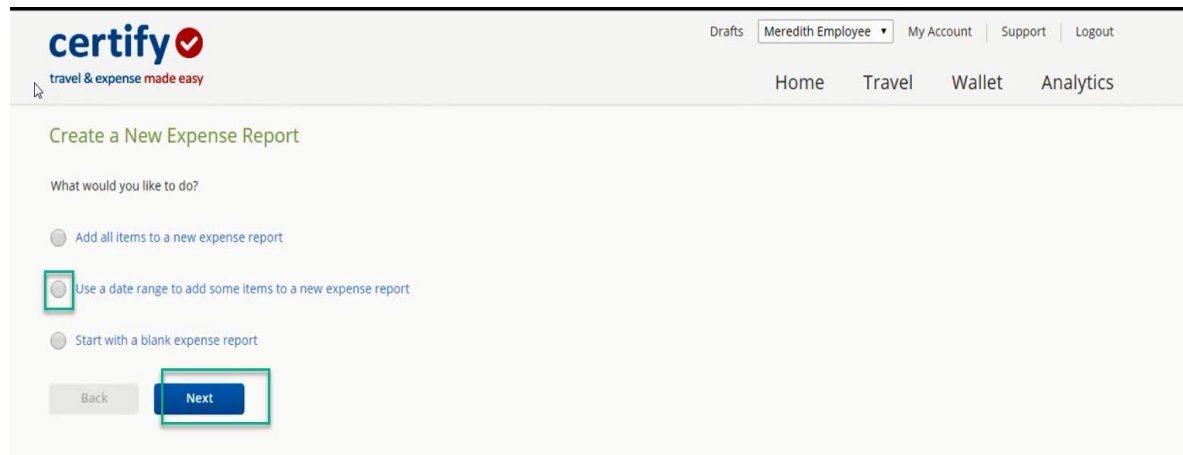
Add Receipts	
MOBILE	EMAIL
UPLOAD	
MORE METHODS	

Schedule Expense Reports	
ReportExecutive™ is off.	Meet your fully automated expense report.
CONFIGURE ReportExecutive™	

Create and Submit Expense Reports

Select the item that you would like to do and then click **Next**.

- Add all items to a new expense report
- Use a date range to add some items to a new expense report (selected below)
- Start with a blank expense report



The screenshot shows the 'certify' logo with the tagline 'travel & expense made easy'. The user is logged in as 'Meredith Employee'. The main heading is 'Create a New Expense Report'. Below this, the question 'What would you like to do?' is followed by three radio button options: 'Add all items to a new expense report', 'Use a date range to add some items to a new expense report' (which is selected and highlighted with a green box), and 'Start with a blank expense report'. At the bottom, there are 'Back' and 'Next' buttons, with the 'Next' button also highlighted by a green box.

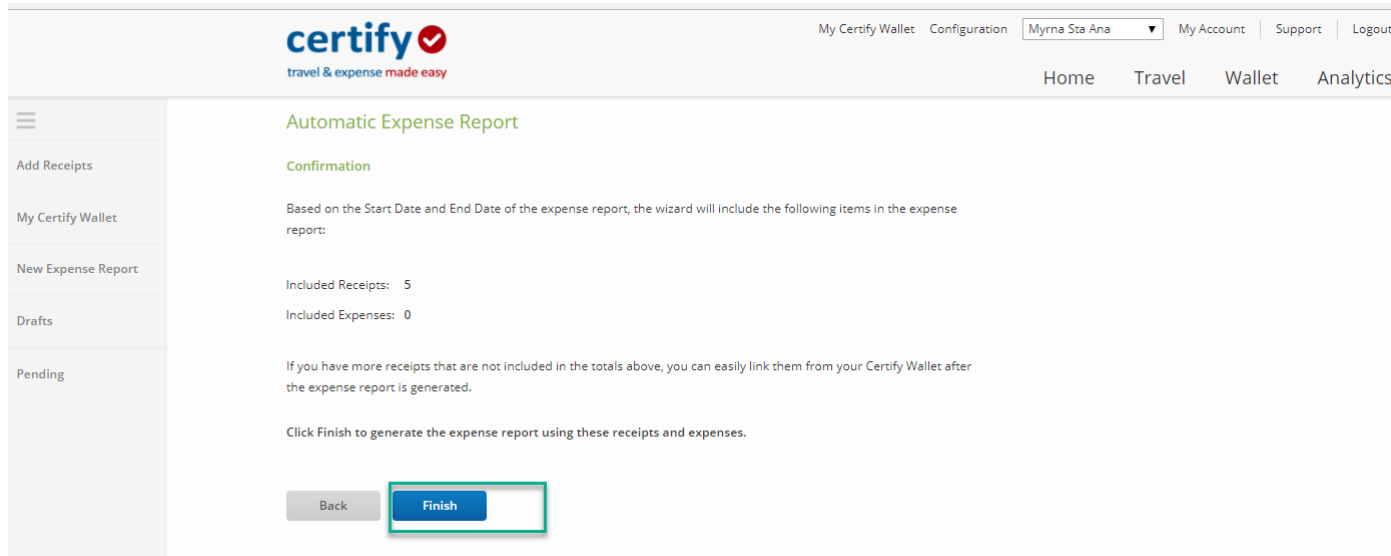
Create and Submit Expense Reports

- Since “Use a date range to add some items to a new expense report” was selected, enter the details of the expense report in the fields provided. Click **next**
- Expense Report Name = TEC–mm/dd/yy
- Start date and End date = 4/1/2018 and 4/5/2018
- Description – CSU Business Conference

The screenshot shows the 'certify' web application interface. The header includes the 'certify' logo with the tagline 'travel & expense made easy'. Navigation links include 'My Certify Wallet', 'Configuration', a user dropdown 'Myrna Sta Ana', 'My Account', 'Support', and 'Logout'. A secondary navigation bar has 'Home', 'Travel', 'Wallet', and 'Analytics'. The left sidebar lists menu items: 'Add Receipts', 'My Certify Wallet', 'New Expense Report', 'Drafts', and 'Pending'. The main content area is titled 'Create a New Expense Report' and contains the form 'Enter expense report information'. The form fields are: 'Expense Report Name' (containing 'TEC 1/31/2018 - 2/2/2018'), 'Billable to Client' (checkbox), 'Start Date' (calendar icon, containing '1/31/2018'), 'End Date' (calendar icon, containing '2/2/2018'), and 'Description' (containing 'CSU Workshop, San Diego CA'). At the bottom are 'Back' and 'Next' buttons. Red arrows point to the 'Expense Report Name', 'Start Date', 'End Date', and 'Description' fields. The 'Next' button is highlighted with a red box.

Create and Submit Expense Reports

Click finish to create the expense report



The screenshot shows the 'Automatic Expense Report' confirmation page in the Certify system. The page has a light gray header with the Certify logo (a red checkmark in a circle) and the tagline 'travel & expense made easy'. The header also includes navigation links: 'My Certify Wallet', 'Configuration', a dropdown menu showing 'Myrna Sta Ana', 'My Account', 'Support', and 'Logout'. Below the header, there are tabs for 'Home', 'Travel', 'Wallet', and 'Analytics'. On the left side, there is a sidebar with a menu icon and links for 'Add Receipts', 'My Certify Wallet', 'New Expense Report', 'Drafts', and 'Pending'. The main content area is titled 'Automatic Expense Report' and 'Confirmation'. It states: 'Based on the Start Date and End Date of the expense report, the wizard will include the following items in the expense report:'. Below this, it shows 'Included Receipts: 5' and 'Included Expenses: 0'. A paragraph follows: 'If you have more receipts that are not included in the totals above, you can easily link them from your Certify Wallet after the expense report is generated.' At the bottom, it says 'Click Finish to generate the expense report using these receipts and expenses.' There are two buttons: a gray 'Back' button and a blue 'Finish' button, which is highlighted with a green rectangular border.

certify
travel & expense made easy

My Certify Wallet Configuration Myrna Sta Ana My Account Support Logout

Home Travel Wallet Analytics

Automatic Expense Report

Confirmation

Based on the Start Date and End Date of the expense report, the wizard will include the following items in the expense report:

Included Receipts: 5
Included Expenses: 0

If you have more receipts that are not included in the totals above, you can easily link them from your Certify Wallet after the expense report is generated.

Click Finish to generate the expense report using these receipts and expenses.

Back Finish

Create and Submit Expense Reports

All receipts and expenses in your wallet will be added to your expense report.

The screenshot shows the 'certify' web application interface. At the top, there's a navigation bar with links like 'My Certify Wallet', 'Configuration', 'Myrna Sta Ana', 'My Account', 'Support', and 'Logout'. Below this, a sidebar on the left contains links for 'Add Receipts', 'My Certify Wallet', 'New Expense Report', 'Drafts', and 'Pending'. The main content area is titled 'Expense Report' and shows a report for 'TEC 1/31/2018 - 2/2/2018'. It includes a table of expenses with columns for Expense, Date, Department, Category, Details, Amount, Reim., Reim. Amount, Billable, Receipt, and Reason. The table lists four expenses, with the last one being a mileage expense for \$190.86. Below the table, there are buttons for 'Cleanup Wizard', 'Per Diem Wizard', 'Print Report', and 'Submit for Approval'. At the bottom, there's a 'My Certify Wallet' section showing a list of items with columns for Date, Category, Description, and Amount. The 'Add Expense' form at the bottom left includes fields for Date, Department, Category, Reason, Reimbursable, Billable, and Receipt, with a 'Save' button highlighted by a red box.

certify
travel & expense made easy

My Certify Wallet Configuration Myrna Sta Ana My Account Support Logout

Home Travel Wallet Analytics

Cleanup Wizard Per Diem Wizard Print Report

Submit for Approval

Expense Report

Report Name TEC 1/31/2018 - 2/2/2018

Dates 1/31/2018 - 2/2/2018

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input checked="" type="checkbox"/>	2/1/2018	920101 - Fiscal Services	Unknown		0.00	Yes	0.00	No		
<input checked="" type="checkbox"/>	2/1/2018	920101 - Fiscal Services	Unknown		0.00	Yes	0.00	No		
<input checked="" type="checkbox"/>	2/1/2018	920101 - Fiscal Services	606001 - Taxi, Tools, Parking ...		34.55	Yes	34.55	No		
<input checked="" type="checkbox"/>	2/1/2018	920101 - Fiscal Services	Unknown		0.00	Yes	0.00	No		
<input checked="" type="checkbox"/>	2/1/2018	920101 - Fiscal Services	606001 - Mileage (in State)		190.86	Yes	190.86	No		

Total Non-Reimbursable \$0.00
Total Reimbursable \$225.41

Add Expense

Date

Department 920101 - Fiscal Services

Category

Reason

Reimbursable I paid for this, please reimburse me.

Billable ☐

Receipt

My Certify Wallet

Merge Items

Date	Category	Description	Amount
2/6/18	606001 - Lodgi...	Certify Test1.pdf	\$388.40

Create and Submit Expense Reports

Expenses with a Red Flag are items that need attention. Click the Cleanup Wizard to edit those expenses.

The screenshot shows the Certify expense report interface. At the top, the Certify logo and navigation links are visible. The main section is titled "Expense Report" and shows the report name "TEC 1/31/2018 - 2/2/2018" and dates "1/31/2018 - 2/2/2018". A "Cleanup Wizard" button is highlighted in the top right. Below the report details, there is a table of expenses. The table has columns for Expense, Date, Department, Category, Details, Amount, Reim., Reim. Amount, Billable, Receipt, and Reason. The first four rows of the table are highlighted with a red box. The first row shows an expense of 0.00 for "Fiscal Services" with a red flag in the Details column. The second row shows an expense of 0.00 for "Fiscal Services" with a red flag. The third row shows an expense of 34.55 for "Taxi, Tools, Parking ..." with a green checkmark. The fourth row shows an expense of 0.00 for "Fiscal Services" with a red flag. The fifth row shows an expense of 190.86 for "Mileage (In State)" with a green checkmark. Below the table, the totals are shown: "Total Non-Reimbursable \$0.00" and "Total Reimbursable \$225.41". At the bottom, there is an "Add Expense" form and a "My Certify Wallet" section.

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input checked="" type="checkbox"/>	2/1/2018	920101 - Fiscal Services	Unknown	1	0.00	Yes	0.00	No		
<input checked="" type="checkbox"/>	2/1/2018	920101 - Fiscal Services	Unknown	1	0.00	Yes	0.00	No		
<input checked="" type="checkbox"/>	2/1/2018	920101 - Fiscal Services	606001 - Taxi, Tools, Parking ...	<input checked="" type="checkbox"/>	34.55	Yes	34.55	No		
<input checked="" type="checkbox"/>	2/1/2018	920101 - Fiscal Services	Unknown	1	0.00	Yes	0.00	No		
<input checked="" type="checkbox"/>	2/1/2018	920101 - Fiscal Services	606001 - Mileage (In State)	<input checked="" type="checkbox"/>	190.86	Yes	190.86	No		

Total Non-Reimbursable \$0.00
Total Reimbursable \$225.41

Add Expense

Date:
Department: 920101 - Fiscal Services
Category:
Reason:
Reimbursable:
Billable: ☐
Receipt:

My Certify Wallet

Merge Items ☐

Date	Category	Description	Amount
2/6/18	606001 - Lodgi...	Certify Test1.pdf	\$388.40


Create and Submit Expense Reports

Once the Cleanup Wizard is selected follow the instructions in Red and clear all Red items. Click Finish when done.

The screenshot shows the 'certify' web application interface for an 'Expense Report Cleanup' process. The top navigation bar includes links for Drafts, Configuration, Myrna Sta Ana (user), My Account, and Support. The main header shows 'Home', 'Travel', 'Wallet', and 'Ana'. The left sidebar lists navigation options: Add Receipts, My Certify Wallet, New Expense Report, Drafts, TEC 1/31/2018 - 2/2/2..., and Pending. The main content area is titled 'Expense Report Cleanup' and shows 'Current Step: 1 - 2 - 3 - 4'. The 'Expense Details' section contains red error messages: 'You must select an Expense Category.', 'You must enter a Vendor.', and 'You must enter a Location.'. The form fields include Date (2/1/2018), Department (920101 - Fiscal Services), Category (dropdown), Amount (0.00), Vendor (dropdown), Location (dropdown), Reason (text area), Reimbursable (I paid for this, please reimburse me.), Billable (checkbox), and Skip (checkbox). The 'Receipt Image' section shows a placeholder image with the text 'Test - Receipt'. At the bottom, there are 'Back', 'Next', and 'Finish' buttons, with the 'Finish' button highlighted by a green box.

Create and Submit Expense Reports

To Edit an expense, click on the edit icon (pencil) next to the expense line .



travel & expense made easy

Drafts

Meredith Employee

My Account

Support

Logout

Home

Travel

Wallet

Analytics

My Expense Report

Print Report

Report Name






























October 2016

Dates

10/1/2016 - 10/31/2016

Submit for Approval

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Billable	Receipt	Reason
 	10/4/2016	General & Admin	Other Transportation	 	25.00	Yes	No		
 	10/21/2016	General & Admin	Office Equipment	 	34.40	No	No		
 	10/22/2016	General & Admin	Other Transportation	 	12.00	No	No		
 	10/24/2016	General & Admin	Office Equipment	 	75.58	No	No		
 	10/27/2016	General & Admin	Lodging	 	560.53	No	No		

Total Non-Reimbursable

\$682.51

Total Personal

\$0.00

Total Reimbursable


\$25.00

Total Expenses

\$707.51

Add Expense

Date




Department

General & Admin



Category

Reason

My Certify Wallet

Merge Items 



Add

10/21/16

Whiteboard and dry ...



Add

10/22/16

Parking at airport

Add


 

10/24/16

Laptop webcam for ...

Create and Submit Expense Reports

For Other Actions, like Splitting or Deleting an expense, click the arrow on the Other Actions (<).



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DraftsMeredith EmployeeMy AccountSupportLogout

HomeTravelWalletAnalytics

My Expense Report




















Print Report

Report NameOctober 2016

Dates10/1/2016 - 10/31/2016

Submit for Approval

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Billable	Receipt	Reason
	10/4/2016	General & Admin	Other Transportation		25.00	Yes	No		
	10/21/2016	General & Admin	Office Equipment		34.40	No	No		
	10/22/2016	General & Admin	Other Transportation		12.00	No	No		
	10/24/2016	General & Admin	Office Equipment		75.58	No	No		
			Lodging		560.53	No	No		

Other Actions

Delete Expense

Send to Wallet

Split Expense

Copy Expense

Add Bank Fee

Total Non-Reimbursable

\$682.51

Total Personal

\$0.00

Total Reimbursable

\$25.00

Total Expenses

\$707.51

Add Expense

Date

DepartmentGeneral & Admin

Category

Reason

My Certify Wallet

Merge Items

Add

10/21/16

Whiteboard and dry ...

Add

10/22/16

Parking at airport

Add

10/24/16

Laptop webcam for ...


Add

10/27/16

Hotel stay - DoubleT...

Create and Submit Expense Reports

Splitting the expense will allow you to create extra expense lines with one receipt.



travel & expense made easy

DraftsMeredith EmployeeMy AccountSupportLogout

HomeTravelWalletAnalytics

My Expense Report






























Print Report

Report NameOctober 2016

Dates10/1/2016 - 10/31/2016

Submit for Approval

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Billable	Receipt	Reason
 	10/4/2016	General & Admin	Other Transportation	 	25.00	Yes	No		
 	10/21/2016	General & Admin	Office Equipment	 	34.40	No	No		
 	10/22/2016	General & Admin	Other Transportation	 	12.00	No	No		
 	10/24/2016	General & Admin	Office Equipment	 	75.58	No	No		
 			Lodging	 	560.53	No	No		

Other Actions

Delete Expense

Send to Wallet

Split Expense

Copy Expense

Add Bank Fee

Total Non-Reimbursable

\$682.51

Total Personal

\$0.00

Total Reimbursable

\$25.00

Total Expenses

\$707.51

Add Expense

Date

DepartmentGeneral & Admin

Category

Reason

My Certify Wallet

Merge Items

Add

10/21/16

Whiteboard and dry ...

Add

10/22/16

Parking at airport

Add

10/24/16

Laptop webcam for ...


Add

10/27/16

Hotel stay - DoubleT...

Create and Submit Expense Reports

Example : Splitting Expense



Drafts Configuration Myrna Sta Ana My Account Support Logout

Home Travel Wallet Analytics

Split Expense

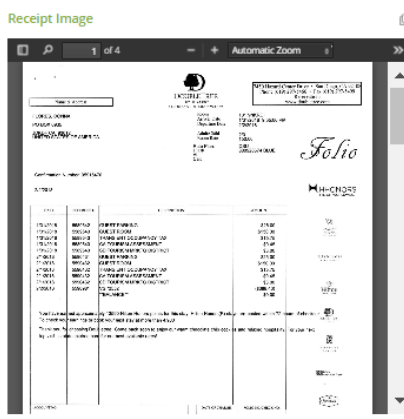
Enter an itemized amount that is included in this expense.

Expense Amount \$300.00
Reimbursable Amount \$300.00
Expense Category 606001 - Lodging (In State)

Itemized Expense

Date 2/6/2018
Department 920101 - Fiscal Services
Category 606001 - Lodging (In State)
Amount 0.00 United States Dollars
Business Unit CICMP - CSU Channel Islands
Fund GD901 - CI - Operating
Program
Project
Hotel DOUBLE TREE
Location SAN DIEGO, CA
Check-in 1/31/2018
Check-out 2/2/2018
Reason LODGING
Reimbursable I paid for this, please reimburse me.

Receipt Image




Receipt Certify Test1.pdf
Relationship Link expenses

Save Split Again Cancel

Create and Submit Expense Reports

Example : Splitting Expense



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Myrna Sia Ana

My Account | Support | Logout

Home | Travel | Wallet | Analytics

Expense Report

Report Name: Test 2

Dates: 2/1/2018 - 2/3/2018

Submit for Approval

Expenses

	2/6/2018	920101 - Fiscal Services	606001 - Lodging (In State)		0.00	Yes	0.00	No		
	1/31/2018	920101 - Fiscal Services	606001 - Taxi, Tools, Parking ...		25.00	Yes	25.00	No		
	2/1/2018	920101 - Fiscal Services	606001 - Taxi, Tools, Parking ...		25.00	Yes	25.00	No		
	2/6/2018	920101 - Fiscal Services	606001 - Lodging (In State)		300.00	Yes	300.00	No		
	2/6/2018	920101 - Fiscal Services	606001 - Lodging Taxes and Fee...		38.40	Yes	38.40	No		
Total Non-Reimbursable					\$0.00					
Total Reimbursable					\$388.40					
Total Expenses					\$388.40					

Edit Expense

Date

2/6/2018

Department

920101 - Fiscal Services

Category

606001 - Lodging (In State)

Amount

0.00

United States Dollars

Business Unit

CICMP - CSU Channel Islands

Fund

GD901 - CI - Operating

Program

Project

Hotel

DOUBLE TREE

Location

SAN DIEGO, CA

Check-in

1/31/2018

Check-out

2/2/2018

Reason

LODGING

Reimbursable

I paid for this, please reimburse me.

Receipt

Change

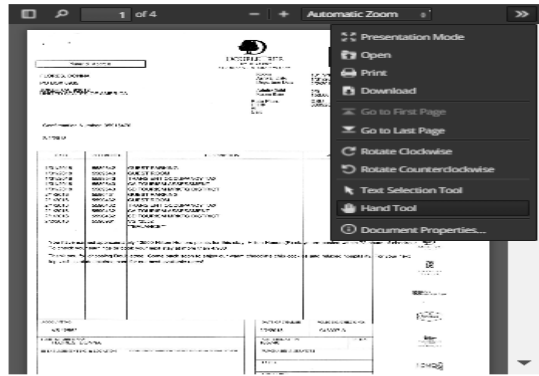
Save

Cancel

Receipt Image

1 of 4

Automatic Zoom

























Create and Submit Expense Reports

To add an Expense, select Add on the receipts that you want to create an Expense for in **My Certify Wallet** and a new expense will appear.

The screenshot displays two side-by-side panels from a web application. The left panel, titled 'Add Expense', contains a form with the following fields: 'Date' with a calendar icon, 'Department' set to 'General & Admin', 'Category' (empty), 'Reason' (empty), and 'Reimbursable' set to 'I paid for this, please reimburse me.'. There is also a 'Billable' checkbox (unchecked) and a 'Receipt' section with a 'Change' button. At the bottom are 'Save' and 'Cancel' buttons. The right panel, titled 'My Certify Wallet', shows a list of items. The first item is highlighted with a red box and contains a receipt icon, an upload icon, the date '11/4/16', and the filename 'National Rental.pdf'. Above the list are controls for 'Merge Items' (a toggle switch) and icons for upload and refresh.

Create and Submit Expense Reports

Use the edit button (Pencil) to enter a new detail to go with the expense.

Expense	Date	Department	Category	Details	Amount	Reim.	Billable	Receipt	Reason
	10/4/2016	General & Admin	Other Transportation		25.00	Yes	No		
	10/21/2016	General & Admin	Office Equipment		34.40	No	No		
	10/22/2016	General & Admin	Other Transportation		12.00	No	No		
	10/24/2016	General & Admin	Office Equipment		75.58	No	No		
	10/27/2016	General & Admin	Lodging		560.53	No	No		
	11/4/2016	General & Admin	Unknown		0.00	Yes	No		

Total Non-Reimbursable\$682.51

Total Personal\$0.00

Total Reimbursable\$25.00

Total Expenses\$707.51

Add Expense

Date

DepartmentGeneral & Admin

Category

Reason

ReimbursableI paid for this, please reimburse me.

Billable

ReceiptChange

Save

Cancel

My Certify Wallet

Merge Items

Create and Submit Expense Reports

Complete the fields on the Edit Expense screen, click Save.

Edit Expense

Date: 11/4/2016

Department: General & Admin

Category: Rental Car

Amount: 143.42

Company: National Car Rental

Location: Boston, MA

Pick-up: 11/2/2016

Drop-off: 11/4/2016

Reason:

Reimbursable: I paid for this, please reimburse me.

Billable: ☐

Receipt: [Change](#)

[Save](#) [Cancel](#)

Receipt Image

National
Rental Agreement # 1334
Invoice # 1334

Renter Information
Renter Name: Employee
Renter Address: Employee Address


Trip Information
Pickup: Thu, Aug 20 2015 07:28 PM
Return: Fri, Aug 21 2015 12:00 AM
Location: BOSTON LOGAN INTL AIRPT (BOS)
Address: 15 TRANSPORTATION BLVD
BOSTON, MA 02130-3033

Rental Charges
Rental Rate: 1 day at \$104.00 / day: \$104.00
Add-Ons: Toll Pass Device (\$3.00 / day): \$3.00
Mileage: Unlimited Mileage: Included
Taxes and Fees: Domestic Security Fee 5.00/day: \$5.00
Airport Access Fee 12 Pct (12.00%): \$15.00
Transportation Facility Charge: \$5.00
Collision Recovery Fee Surcharge: \$5.00
Vehicle License Fee Return: \$5.00
Sales Tax (7.00%): \$5.00
Vehicle Rental Tax (3.00%): \$5.00
Total: \$143.42
(Subject to audit)
Amount charged on Aug 21 2015 to American Express
Amount Due: (\$0.00)

Vehicle Information
AVALON
License # 1234
Description: 2015 Dodge Car Automatic A/C
Vehicle Class: Compact
Vehicle Class Change: \$0.00
Description: 2015 Dodge Car Automatic A/C
Mileage: 0.00 / Ending: 0.00
Total: 0.00
Thank you for renting with National Car Rental.

Create and Submit Expense Reports

When edits are completed, click submit for approval on the upper right side.

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
















Drafts Meredith Employee My Account Support Logout

Home Travel Wallet Analytics


My Expense Report [Cleanup Wizard](#) [Print Report](#)

Report Name October 2016
Dates 10/1/2016 - 10/31/2016 [Submit for Approval](#)

Expenses

Expense	Date	Department	Category	Details	Amount	Reim.	Billable	Receipt	Reason
 	10/4/2016	General & Admin	Other Transportation	 	25.00	Yes	No		
 	10/21/2016	General & Admin	Office Equipment	 	34.40	No	No		
 	10/22/2016	General & Admin	Other Transportation	 	12.00	No	No		
 	10/24/2016	General & Admin	Office Equipment	 	75.58	No	No		
 	10/27/2016	General & Admin	Lodging	 	560.53	No	No		
 	11/4/2016	General & Admin	Rental Car	 	143.42	Yes	No		
Total Non-Reimbursable					\$682.51				
Total Personal					\$0.00				
Total Reimbursable					\$168.42				
Total Expenses					\$850.93				




Add Expense

Date 

Department General & Admin

Category

My Certify Wallet

Merge Items   

Create and Submit Expense Reports

Click Yes to confirm that the expense is true and accurate.

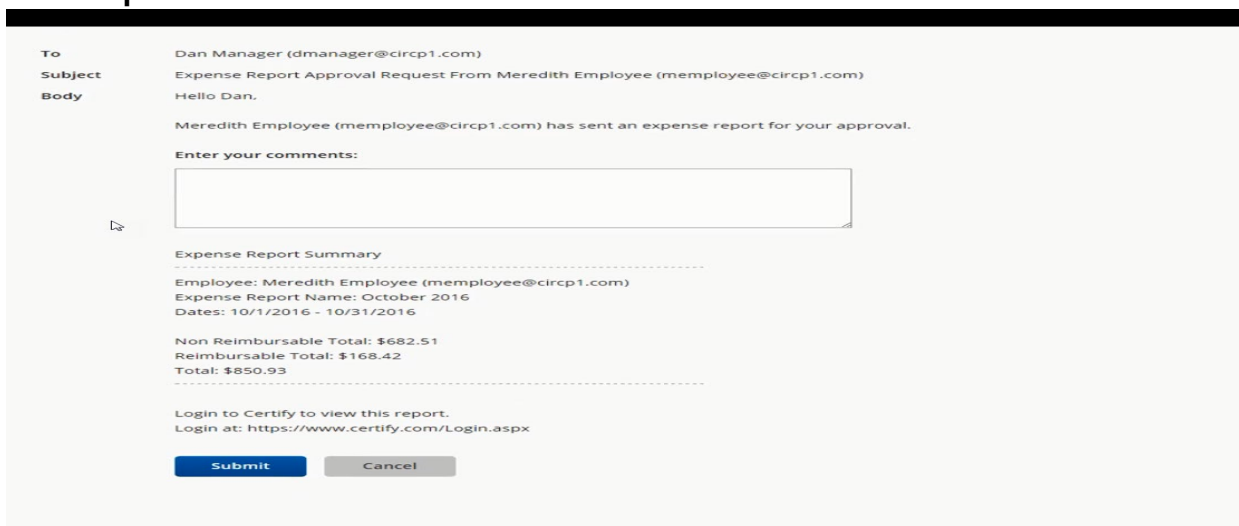
The screenshot displays the Certify web application interface. At the top, the logo reads "certify" with the tagline "travel & expense made easy". Navigation links include Drafts, Meredith Employee (dropdown), My Account, Support, Logout, Home, Travel, Wallet, and Analytics. The main heading is "My Expense Report", with links for Cleanup Wizard and Print Report. Below this, the "Report Name" is set to "October 2016" and "Dates" are "10/1/2016 - 10/31/2016". A blue "Submit for Approval" button is visible. The "Expenses" section contains a table with columns: Expense, Date, Department, Category, Details, Amount, Reim., Billable, Receipt, and Reason. A "Confirmation" modal dialog is open, displaying the text: "I Certify this expense report is true and accurate. Are you sure you want to submit this expense report?" with "Yes" and "No" buttons. The table data includes entries for dates 10/4/2016 through 11/4/2016, all under the "General & Admin" department. At the bottom left, the "Add Expense" section has fields for Date and Department (set to "General & Admin"). At the bottom right, the "My Certify Wallet" section includes a "Merge Items" toggle and icons for upload and refresh.

Expense	Date	Department	Category	Details	Amount	Reim.	Billable	Receipt	Reason
	10/4/2016	General & Admin	Other Tra		0	Yes	No		
	10/21/2016	General & Admin	Office Eq		0	No	No		
	10/22/2016	General & Admin	Other Tra		0	No	No		
	10/24/2016	General & Admin	Office Eq		8	No	No		
	10/27/2016	General & Admin	Lodging		3	No	No		
	11/4/2016	General & Admin	Rental Ca		2	Yes	No		

Total Expenses: \$850.00

Create and Submit Expense Reports

Your expenses should be routed to the person who has Signature Authority to approve your expense report. This person may or may not be your direct Manager. If you are seeing the wrong person in the preview email, please contact Ilene Mehrez at ilene.mehrez@csuci.edu, 805-437-8581 to update your account set up **prior** to clicking the **Submit** button. In addition, you can add a comment in the comment box and then click submit to complete the submission process.



The screenshot shows an email client interface. The email header includes 'To: Dan Manager (dmanager@circp1.com)', 'Subject: Expense Report Approval Request From Meredith Employee (memmployee@circp1.com)', and 'Body: Hello Dan.' The main body of the email states: 'Meredith Employee (memmployee@circp1.com) has sent an expense report for your approval.' Below this is a text input field with the placeholder 'Enter your comments:'. A small cursor icon is visible to the left of the input field. Below the input field is a section titled 'Expense Report Summary' followed by a dashed line. The summary details are: 'Employee: Meredith Employee (memmployee@circp1.com)', 'Expense Report Name: October 2016', 'Dates: 10/1/2016 - 10/31/2016', 'Non Reimbursable Total: \$682.51', 'Reimbursable Total: \$168.42', and 'Total: \$850.93'. Another dashed line follows. At the bottom, it says 'Login to Certify to view this report.' and 'Login at: https://www.certify.com/Login.aspx'. There are two buttons at the bottom: a blue 'Submit' button and a grey 'Cancel' button.

To: Dan Manager (dmanager@circp1.com)
Subject: Expense Report Approval Request From Meredith Employee (memmployee@circp1.com)
Body: Hello Dan.

Meredith Employee (memmployee@circp1.com) has sent an expense report for your approval.

Enter your comments:

Expense Report Summary

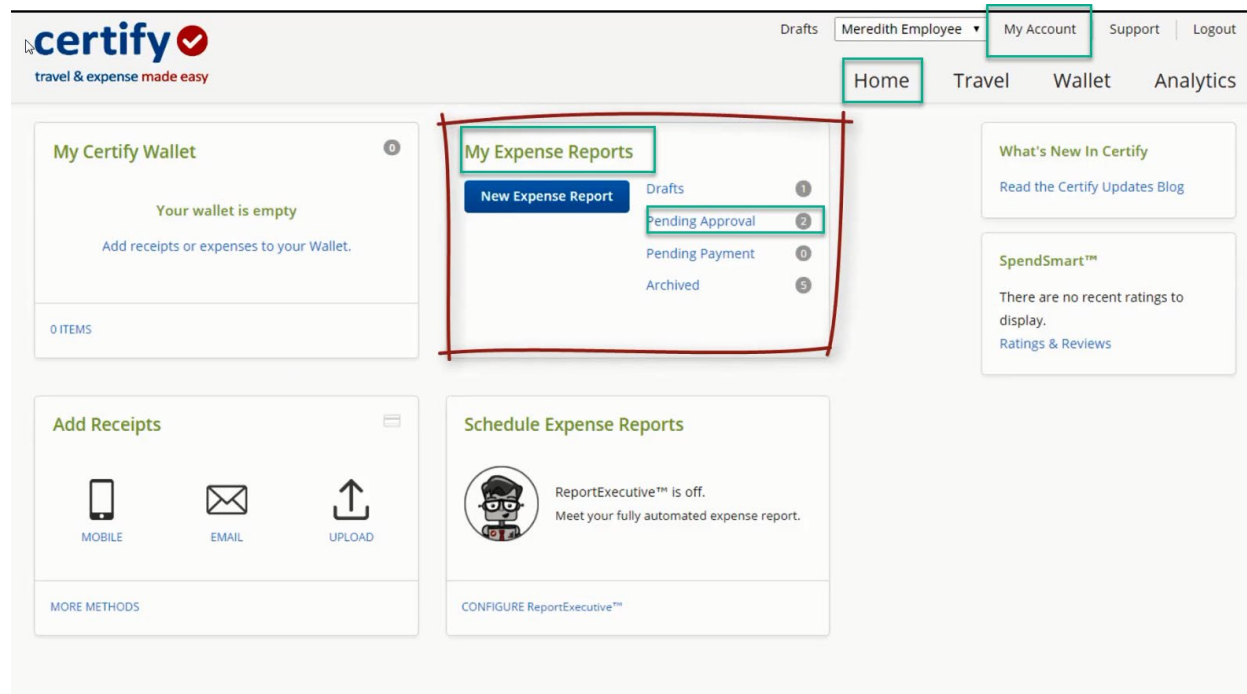
Employee: Meredith Employee (memmployee@circp1.com)
Expense Report Name: October 2016
Dates: 10/1/2016 - 10/31/2016
Non Reimbursable Total: \$682.51
Reimbursable Total: \$168.42
Total: \$850.93

Login to Certify to view this report.
Login at: <https://www.certify.com/Login.aspx>

Submit Cancel

Create and Submit Expense Reports

Expense Report status update can be found under your **My Account** **Homepage** under **My Expense Reports – Pending Approval**.



Timeline

Expense Report Reimbursement Request must be submitted by the Traveler for approval to their **Manager who has Signature Authority** no later than 60 days after the expenses were paid or incurred as stated on the CSU Channel Islands Travel Procedures and Regulations, item II-D, page 6.

Manager should be timely in approving the expense report reimbursement or returning them to the Traveler for correction.

Approvers may only approve expenses allocated to department which includes (fund/s) over which they have current Delegated Authority. After approval, the manager must submit the Expense Report Reimbursement to Accounts Payable for payment processing.

Reference

CITRAVEL PROCEDURES AND REGULATIONS

<https://www.csuci.edu/financial-services/documents/accounting/ci-travel-procedures-regulations-jan-2018.pdf>

Direct Deposit

Direct deposit is the fastest and most convenient way of getting reimbursed. Please email ilene.mehrez@csuci.edu to enroll in direct deposit for travel reimbursement.

Note: Travel Expense reimbursement direct deposit is not Direct Deposit for Payroll.



Channel Islands
CALIFORNIA STATE UNIVERSITY

Contact Information

Booking – Ilene Mehrez – Ilene.mehrez@csuci.edu 805-437-8581

Expense Reporting/Reimbursement - CIAP@csuci.edu 805-437-3700