

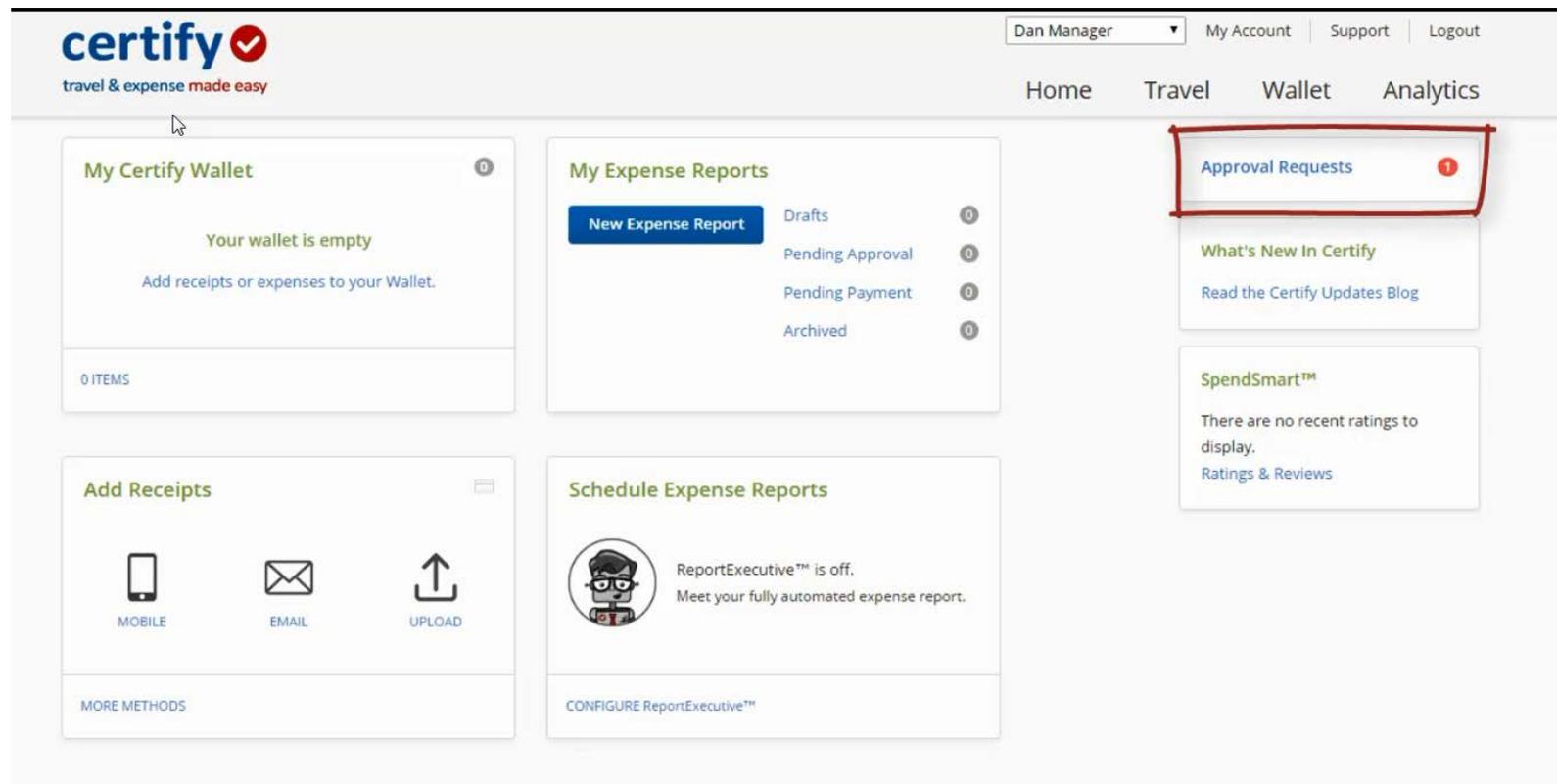
# **APPROVING EXPENSE REPORTS**

Myrna Sta Ana  
*Accounts Payable*

# Approving an Expense Report

When an expense report is **Submitted for Approval**, the approver receives an email alerting them that an expense report is awaiting their approval.

To approve the expense report using Certify online, click on **Approval Requests** on your homepage.

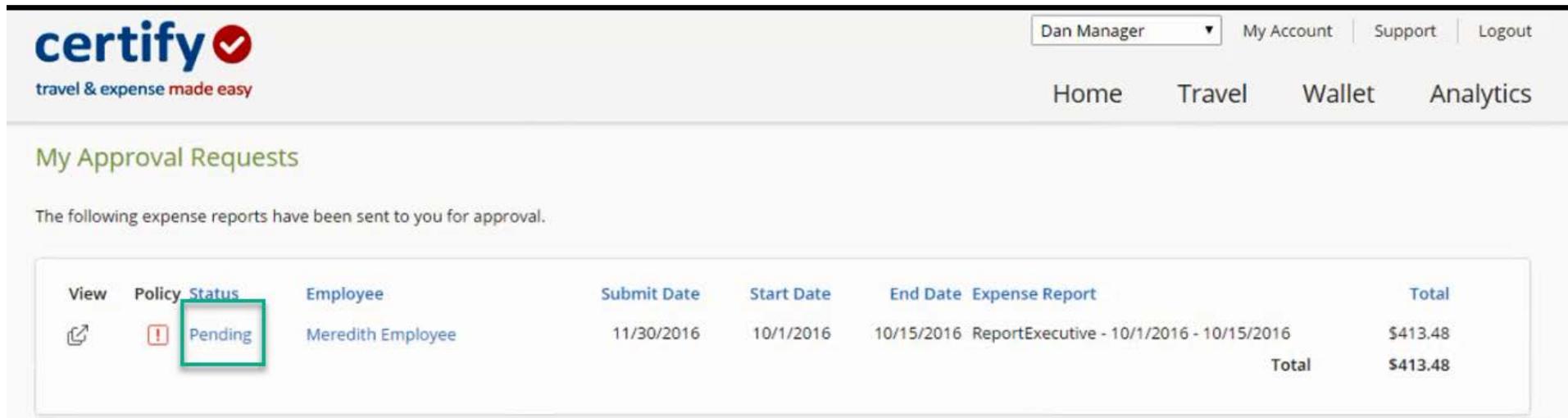


The screenshot displays the Certify online homepage for a user named Dan Manager. The page features a navigation bar with links for Home, Travel, Wallet, and Analytics. The main content area is divided into several sections:

- My Certify Wallet:** A section indicating that the wallet is empty and providing instructions to add receipts or expenses.
- My Expense Reports:** A section with a "New Expense Report" button and a list of report statuses: Drafts, Pending Approval, Pending Payment, and Archived.
- Approval Requests:** A section highlighted with a red box, containing a link to "Approval Requests" with a notification badge.
- What's New In Certify:** A section with a link to "Read the Certify Updates Blog".
- SpendSmart™:** A section with a link to "Ratings & Reviews".
- Add Receipts:** A section with icons for MOBILE, EMAIL, and UPLOAD, and a link to "MORE METHODS".
- Schedule Expense Reports:** A section with a "ReportExecutive™ is off" notification and a link to "CONFIGURE ReportExecutive™".

# Approving an Expense Report

On the next page, there will be a list of all the expense reports awaiting your approval. To open a report click on **Pending**.



The screenshot shows the Certify web application interface. At the top left is the Certify logo with the tagline "travel & expense made easy". On the top right, there is a user menu for "Dan Manager" and links for "My Account", "Support", and "Logout". Below this is a navigation bar with "Home", "Travel", "Wallet", and "Analytics". The main content area is titled "My Approval Requests" and includes a message: "The following expense reports have been sent to you for approval." Below this is a table with the following data:

View	Policy	Status	Employee	Submit Date	Start Date	End Date	Expense Report	Total
		Pending	Meredith Employee	11/30/2016	10/1/2016	10/15/2016	ReportExecutive - 10/1/2016 - 10/15/2016	\$413.48
							Total	\$413.48

# Approving an Expense Report

On the following page you will see the expense lines with corresponding receipts images.

**certify**   
travel & expense made easy

My Approval Requests | Dan Manager | My Account | Support | Logout

Home | Travel | Wallet | Analytics

## Approve Expense Report

**Status:** Pending Approval  
**Current Approver:** Dan Manager  
**Department:** General & Admin (01)  
**Summary:** Meredith Employee

**Approval History:**  
11/30/2016 Submitted Meredith Employee  
Pending Dan Manager  
Send Email to All  
Full Approval History

ReportExecutive - 10/1/2016 - 10/15/2016  
10/1/2016 - 10/15/2016

Print Report

[Submit for Reimbursement](#)

[Disapprove Report](#)

### Receipt Image



1-way Distance: 106 mi

### Expenses

[Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
<a href="#">Approve</a>		10/1/2016	Mileage		119.84	Yes	119.84	No		<a href="#">&gt;</a>
<a href="#">Approve</a>		10/3/2016	Lodging		191.96	Yes	191.96	No		<a href="#">&gt;</a>
<a href="#">Approve</a>		10/3/2016	Coffee, Tea, Snacks		5.82	Yes	5.82	No		<a href="#">&gt;</a>
<a href="#">Approve</a>		10/4/2016	Meals - Large Group		93.11	Yes	93.11	No		<a href="#">&gt;</a>
<a href="#">Approve</a>		10/9/2016	Other Transportation		2.75	Yes	2.75	No		<a href="#">&gt;</a>
<b>Total Non-Reimbursable</b>					<b>\$0.00</b>					
<b>Total Personal</b>					<b>\$0.00</b>					

# Approving an Expense Report

A **Red Exclamation Mark (!)** in the Receipt column means the expense is missing a receipt.

The screenshot displays the Certify expense management system interface. At the top, the logo "certify" is visible with the tagline "travel & expense made easy". The user is logged in as "Dan Manager". The page title is "Approve Expense Report".

Key information on the page includes:

- Status: Pending Approval
- Current Approver: Dan Manager
- Department: General & Admin (01)
- Summary: Meredith Employee
- Report Executive: Meredith Employee
- Report Period: 10/1/2016 - 10/15/2016

Approval History shows a submission on 11/30/2016 by Meredith Employee, which is currently Pending.

Buttons for "Submit for Reimbursement" and "Disapprove Report" are visible.

A "Receipt Image" section shows a map of New Hampshire and Massachusetts with a red line indicating a route. The text "1-way Distance: 106 mi" is displayed.

The "Expenses" table is shown below, with a red box highlighting the "Receipt" column. The table contains the following data:

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve		10/1/2016	Mileage	✓	119.84	Yes	119.84	No	Receipt icon	
Approve		10/3/2016	Lodging	!	191.96	Yes	191.96	No	Receipt icon	
Approve		10/3/2016	Coffee, Tea, Snacks	✓	5.82	Yes	5.82	No	Receipt icon	
Approve		10/4/2016	Meals - Large Group	✓	93.11	Yes	93.11	No	Receipt icon	
Approve		10/9/2016	Other Transportation	✓	2.75	Yes	2.75	No	Receipt icon	

Summary Totals:

- Total Non-Reimbursable: \$0.00
- Total Personal: \$0.00

# Approving an Expense Report

A **Red exclamation mark (!)** in the Details column means the expense is outside CI Travel Procedures and Regulations.

**certify** travel & expense made easy

My Approval Requests: Dan Manager | My Account | Support | Logout

Home | Travel | Wallet | Analytics

### Approve Expense Report

Status: Pending Approval  
Current Approver: Dan Manager  
Department: General & Admin (01)  
Summary: Meredith Employee

Approval History:  
11/30/2016 Submitted Meredith Employee  
Pending Dan Manager  
Send Email to All  
Full Approval History

ReportExecutive - 10/1/2016 - 10/15/2016  
10/1/2016 - 10/15/2016

Print Report

[Submit for Reimbursement](#)

[Disapprove Report](#)

**Receipt Image**



**Expenses** [Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
<a href="#">Approve</a>		10/1/2016	Mileage		119.84	Yes	119.84	No		<a href="#">&gt;</a>
<a href="#">Approve</a>		10/3/2016	Lodging		191.96	Yes	191.96	No		<a href="#">&gt;</a>
<a href="#">Approve</a>		10/3/2016	Coffee, Tea, Snacks		5.82	Yes	5.82	No		<a href="#">&gt;</a>
<a href="#">Approve</a>		10/4/2016	Meals - Large Group		93.11	Yes	93.11	No		<a href="#">&gt;</a>
<a href="#">Approve</a>		10/9/2016	Other Transportation		2.75	Yes	2.75	No		<a href="#">&gt;</a>

Total Non-Reimbursable: \$0.00  
Total Personal: \$0.00

# Approving an Expense Report

To view the details on the expense line, click the details arrow (<).

The screenshot displays the Certify expense management system interface. At the top, the logo "certify" is visible with the tagline "travel & expense made easy". The user is logged in as "Dan Manager". The main heading is "Approve Expense Report".

Key information on the left side includes:

- Status: Pending Approval
- Current Approver: Dan Manager
- Department: General & Admin (01)
- Summary: Meredith Employee
- Report Period: 10/1/2016 - 10/15/2016

An "Approval History" table shows a submission on 11/30/2016 by Meredith Employee, currently in a "Pending" state by Dan Manager. A "Send Email to All" button and a link to "Full Approval History" are also present.

At the bottom left, there are two buttons: "Submit for Reimbursement" (highlighted in blue) and "Disapprove Report".

On the right, a "Receipt Image" section shows a map of New Hampshire and Massachusetts with a red line indicating a route. A callout box indicates a "1-way Distance: 106 mi".

The bottom section, titled "Expenses", contains a table with the following data:

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve <>		10/1/2016	Mileage	✓ <>	119.84	Yes	119.84	No		<>
Approve <>		10/3/2016	Lodging	! <>				No		<>
Approve <>		10/3/2016	Coffee, Tea, Snacks	✓ <>				No		<>
Approve <>		10/4/2016	Meals - Large Group	✓ <>				No		<>
Approve <>		10/9/2016	Other Transportation	✓ <>				No	!	<>

A "Details" pop-up window is open for the Lodging expense, showing a warning: "Maximum amount exceeded. Max Amount is: 175.00 USD per day". Other details include "Location: TAMPA Westshore Airport" and "Hotel Name: Courtyard by Marriott".

At the bottom of the expenses table, there are summary fields: "Total Non-Reimbursable" and "Total Personal" (showing 50.00).

# Approving an Expense Report

There may be times when you need to use the other items in the **Other Actions** menu on an expense line. These items include: **Add Note**, **Inquire**, **Split Expense**, **Disapprove**, **Edit Expense**, **Edit Reimbursement Amount** or **Add Bank Fee**.

The screenshot displays the 'Approve Expense Report' interface. At the top, there are navigation links for 'Home', 'Travel', 'Wallet', and 'Analytics'. The main content area is divided into several sections:

- Summary:** Status: Pending Approval; Current Approver: Dan Manager; Department: General & Admin (01); Summary: Meredith Employee. It includes a 'Print Report' link and two buttons: 'Submit for Reimbursement' (blue) and 'Disapprove Report' (grey).
- Approval History:** Shows a record for 11/30/2016, Submitted by Meredith Employee, with a status of Pending. It includes links for 'Send Email to All' and 'Full Approval History'.
- Receipt Image:** A map showing a route with a '1-way Distance: 106 mi'.
- Expenses Table:** A table with columns: Actions, Status, Date, Category, Details, Amount, Reim, Reim Amt, Billable, Receipt, Reason. It lists five expense lines with various statuses and amounts.
- Other Actions Menu:** A dropdown menu is open over the 'Approve' button of the first expense line, listing options: Add Note, Edit Expense, Inquire, Edit Reim. Amount, Split Expense, Add Bank Fee, and Disapprove.

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve		10/1/2016	Mileage	✓	119.84	Yes	119.84	No		
Approve		10/3/2016	Lodging	!	191.96	Yes	191.96	No		
Approve		10/3/2016	Coffee, Tea, Snacks	✓	5.82	Yes	5.82	No		
Approve				✓	93.11	Yes	93.11	No		
Approve				✓	2.75	Yes	2.75	No	!	

Total Non-Reimbursable	\$0.00
Total Personal	\$0.00
Total Reimbursable	\$413.48
Total Disapproved	\$0.00

# Approving an Expense Report

If you have a question about an expense, you can create an **Inquiry** that will send an email to the submitter/employee.

### Approve Expense Report

**Status** Pending Approval

**Current Approver** Dan Manager

**Department** General & Admin (01)

**Summary** Meredith Employee ⌵

Report Executive - 10/1/2016 - 10/15/2016

10/1/2016 - 10/15/2016

[Print Report](#)

[Submit for Reimbursement](#)

[Disapprove Report](#)

**Approval History**

11/30/2016 Submitted Meredith Employee

Pending Dan Manager

[Send Email to All](#)

[Full Approval History](#)

**Receipt Image** 🔍 ↻ ✕



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### Expenses [Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
<a href="#">Approve</a> <span>⌵</span>		10/1/2016	Mileage	<span>✓</span> <span>⌵</span>	119.84	Yes	119.84	No	<span>📄</span>	<span>⌵</span>
<a href="#">Approve</a> <span>⌵</span>		10/3/2016	Lodging	<span>!</span> <span>⌵</span>	191.96	Yes	191.96	No	<span>📄</span>	<span>⌵</span>
<a href="#">Approve</a> <span>⌵</span>		10/3/2016	Coffee, Tea, Snacks	<span>✓</span> <span>⌵</span>	5.82	Yes	5.82	No	<span>📄</span>	<span>⌵</span>
<a href="#">Approve</a> <span>⌵</span>				<span>✓</span> <span>⌵</span>	93.11	Yes	93.11	No	<span>📄</span>	<span>⌵</span>
<a href="#">Approve</a> <span>⌵</span>				<span>✓</span> <span>⌵</span>	2.75	Yes	2.75	No	<span>!</span> <span>⌵</span>	<span>⌵</span>

**Other Actions** ✕

[Add Note](#) [Edit Expense](#)

[Inquire](#) [Edit Reim. Amount](#)

[Split Expense](#) [Add Bank Fee](#)

[Disapprove](#)

**Total Non-Reimbursable** \$0.00

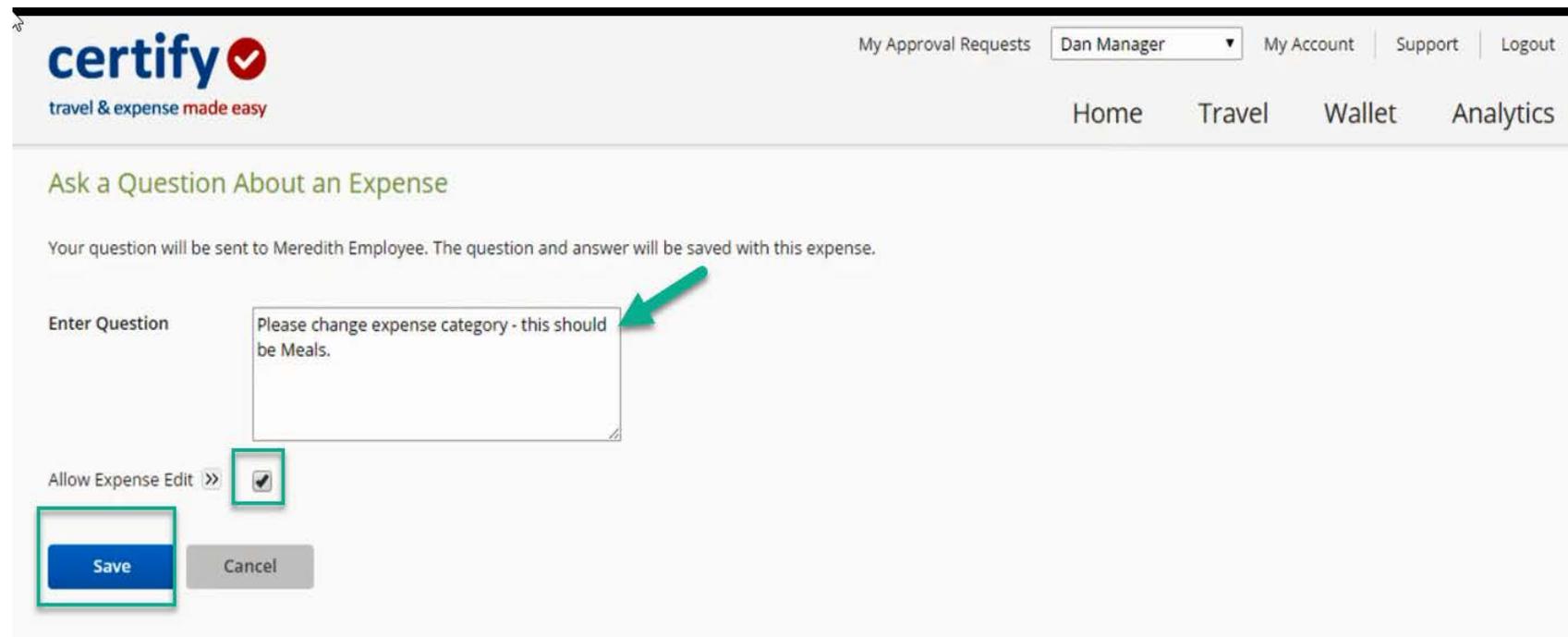
**Total Personal** \$0.00

**Total Reimbursable** \$413.48

**Total Disapproved** \$0.00

# Approving an Expense Report

Enter your question about an expense, once saved your question will be sent to the submitter/employee's email. To allow the submitter/employee to make changes to the expense, check on **Allow Expense Edit** box. Then, click the **Save** button.



The screenshot displays the Certify web application interface. At the top left is the Certify logo with the tagline "travel & expense made easy". The top right navigation bar includes "My Approval Requests", a user dropdown menu for "Dan Manager", and links for "My Account", "Support", and "Logout". Below this is a secondary navigation bar with "Home", "Travel", "Wallet", and "Analytics".

The main content area is titled "Ask a Question About an Expense". Below the title, a message states: "Your question will be sent to Meredith Employee. The question and answer will be saved with this expense." The "Enter Question" section contains a text input field with the text "Please change expense category - this should be Meals." A green arrow points to this text. Below the input field, the "Allow Expense Edit" checkbox is checked, and the "Save" button is highlighted with a green box. A "Cancel" button is also visible.

# Approving an Expense Report

Once the submitter/employee has responded, the approver will receive an email. All inquiries and responses will be saved on the report.

### Approve Expense Report

**Status** Pending Approval

**Current Approver** Dan Manager

**Department** General & Admin (01)

**Summary** Meredith Employee x

Report Executive - 10/1/2016 - 10/15/2016

10/1/2016 - 10/15/2016

[Print Report](#)

[Submit for Reimbursement](#)

[Disapprove Report](#)

**Approval History**

11/30/2016 Submitted Meredith Employee

Pending Dan Manager

[Send Email to All](#)

[Full Approval History](#)

**Receipt Image** 📌 📄 ✕



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**Expenses** [Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
<a href="#">Approve</a> <span style="border: 1px solid #ccc; padding: 2px;">x</span>		10/1/2016	Mileage	<span style="color: green;">✔</span> <span style="border: 1px solid #ccc; padding: 2px;">x</span>	119.84	Yes	119.84	No	<span style="border: 1px solid #ccc; padding: 2px;">x</span>	<span style="border: 1px solid #ccc; padding: 2px;">x</span>
<a href="#">Approve</a> <span style="border: 1px solid #ccc; padding: 2px;">x</span>		10/3/2016	Lodging	<span style="color: red;">!</span> <span style="border: 1px solid #ccc; padding: 2px;">x</span>	191.96	Yes	191.96	No	<span style="border: 1px solid #ccc; padding: 2px;">x</span>	<span style="border: 1px solid #ccc; padding: 2px;">x</span>
<a href="#">Approve</a> <span style="border: 1px solid #ccc; padding: 2px;">x</span>		10/3/2016	Coffee, Tea, Snacks	<span style="color: green;">✔</span> <span style="border: 1px solid #ccc; padding: 2px;">x</span>	5.82	Yes	5.82	No	<span style="border: 1px solid #ccc; padding: 2px;">x</span>	<span style="border: 1px solid #ccc; padding: 2px;">x</span>
<a href="#">Approve</a> <span style="border: 1px solid #ccc; padding: 2px;">x</span>		10/4/2016	Meals	<span style="color: green;">✔</span> <span style="border: 1px solid #ccc; padding: 2px;">x</span>	93.11	Yes	93.11	No	<span style="border: 1px solid #ccc; padding: 2px;">x</span>	<span style="border: 1px solid #ccc; padding: 2px;">x</span>
<p style="margin: 0;">Edit 11/30/2016, Dan Manager asks: Please change expense category - this should be Meals.</p> <p style="margin: 0;">11/30/2016, Meredith Employee answers: Updated. Sorry!</p>										
<a href="#">Approve</a> <span style="border: 1px solid #ccc; padding: 2px;">x</span>		10/9/2016	Other Transportation	<span style="color: green;">✔</span> <span style="border: 1px solid #ccc; padding: 2px;">x</span>	2.75	Yes	2.75	No	<span style="color: red;">!</span> <span style="border: 1px solid #ccc; padding: 2px;">x</span>	<span style="border: 1px solid #ccc; padding: 2px;">x</span>
<b>Total Non-Reimbursable</b>					<b>\$0.00</b>					

# Approving an Expense Report

To approve a single expense, click the **Blue Approve** button under **Actions** column.

### Approve Expense Report

**Status** Pending Approval

**Current Approver** Dan Manager

**Department** General & Admin (01)

**Summary** Meredith Employee ⌵

Report Executive - 10/1/2016 - 10/15/2016

10/1/2016 - 10/15/2016

[Print Report](#)

[Submit for Reimbursement](#)

[Disapprove Report](#)

**Approval History**

11/30/2016 Submitted [Meredith Employee](#)

Pending [Dan Manager](#)

[Send Email to All](#)

[Full Approval History](#)

**Receipt Image** ★ 🔗 ✕



**Expenses** [Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason	
<a href="#">Approve</a> <span>⌵</span>	✔	10/1/2016	Mileage	✔ <span>⌵</span>	119.84	Yes	119.84	No	📄	⌵	
<a href="#">Approve</a> <span>⌵</span>		10/3/2016	Lodging	! <span>⌵</span>	191.96	Yes	191.96	No	📄	⌵	
<a href="#">Approve</a> <span>⌵</span>		10/3/2016	Coffee, Tea, Snacks	✔ <span>⌵</span>	5.82	Yes	5.82	No	📄	⌵	
<a href="#">Approve</a> <span>⌵</span>		10/4/2016	Meals	✔ <span>⌵</span>	93.11	Yes	93.11	No	📄	⌵	
Edit 11/30/2016, Dan Manager asks: Please change expense category - this should be Meals. 11/30/2016, Meredith Employee answers: Updated. Sorry!											
<a href="#">Approve</a> <span>⌵</span>		10/9/2016	Other Transportation	✔ <span>⌵</span>	2.75	Yes	2.75	No	! 📄	⌵	
<b>Total Non-Reimbursable</b>					<b>\$0.00</b>						

# Approving an Expense Report

To approve all expenses at once, click **Approve All**. A confirmation box will appear on the screen. Click **Yes** to confirm.

**Approve Expense Report**

Status: Pending Approval  
Current Approver: Dan Manager  
Department: General & Admin (01)  
Summary: Meredith Employee

Approval History: 11/30/2016 Submitted Meredith Employee  
Pending Dan Manager  
Send Email to All  
Full Approval History

Report Executive - 10/1/2016 - 10/15/2016  
10/1/2016 - 10/15/2016

Print Report

Submit for Reimbursement  
Disapprove Report

**Expenses**

Approve All

**Confirmation**

Are you sure you want to approve all expenses in this expense report?

Yes No

Actions	Status	Date	Category	Reim Amt	Billable	Receipt	Reason				
Approve	✓	10/1/2016	Mileage	119.84	Yes	119.84	No				
Approve		10/3/2016	Lodging	191.96	Yes	191.96	No				
Approve		10/3/2016	Coffee, Tea, Snacks	5.82	Yes	5.82	No				
Approve		10/4/2016	Meals	93.11	Yes	93.11	No				
Edit 11/30/2016, Dan Manager asks: Please change expense category - this should be Meals.											
11/30/2016, Meredith Employee answers: Updated. Sorry!											
Approve		10/9/2016	Other Transportation	2.75	Yes	2.75	No				

Total Non-Reimbursable \$0.00

# Approving an Expense Report

To disapprove the entire expense report, click the gray **Disapprove Report** button. When the expense report is disapproved, the submitter/employee will receive an email and the expense report will go back to the submitter/employee Expense Draft folder.

[Approve Expense Report](#)

Status: Pending Approval

Current Approver: Dan Manager

Department: General & Admin (01)

Summary: Meredith Employee

Report Executive - 10/1/2016 - 10/15/2016

10/1/2016 - 10/15/2016

[Print Report](#)

[Submit for Reimbursement](#)

[Disapprove Report](#)

Approval History

11/30/2016 Submitted Meredith Employee

Pending Dan Manager

[Send Email to All](#)

[Full Approval History](#)

Receipt Image



Expenses [Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
<a href="#">Approve</a> <input type="checkbox"/>	<input checked="" type="checkbox"/>	10/1/2016	Mileage	<input checked="" type="checkbox"/> <input type="checkbox"/>	119.84	Yes	119.84	No	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Approve</a> <input type="checkbox"/>	<input checked="" type="checkbox"/>	10/3/2016	Lodging	<input type="checkbox"/> <input type="checkbox"/>	191.96	Yes	191.96	No	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Approve</a> <input type="checkbox"/>	<input checked="" type="checkbox"/>	10/3/2016	Coffee, Tea, Snacks	<input checked="" type="checkbox"/> <input type="checkbox"/>	5.82	Yes	5.82	No	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Approve</a> <input type="checkbox"/>	<input checked="" type="checkbox"/>	10/4/2016	Meals	<input checked="" type="checkbox"/> <input type="checkbox"/>	93.11	Yes	93.11	No	<input type="checkbox"/>	<input type="checkbox"/>
Edit 11/30/2016, Dan Manager asks: Please change expense category - this should be Meals. 11/30/2016, Meredith Employee answers: Updated. Sorry!										
<a href="#">Approve</a> <input type="checkbox"/>	<input checked="" type="checkbox"/>	10/9/2016	Other Transportation	<input checked="" type="checkbox"/> <input type="checkbox"/>	2.75	Yes	2.75	No	<input type="checkbox"/>	<input type="checkbox"/>

Total Non-Reimbursable \$0.00

# Approving an Expense Report

To approve and submit the expense click Submit for Reimbursement.

**Approve Expense Report**

Status: Pending Approval  
Current Approver: Dan Manager  
Department: General & Admin (01)  
Summary: Meredith Employee

Approval History  
11/30/2016 Submitted Meredith Employee  
Pending Dan Manager  
Send Email to All  
Full Approval History

Report Executive - 10/1/2016 - 10/15/2016  
10/1/2016 - 10/15/2016

Print Report

**Submit for Reimbursement**

Disapprove Report

**Receipt Image**



**Expenses** [Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
<a href="#">Approve</a>	✓	10/1/2016	Mileage	✓	119.84	Yes	119.84	No		<a href="#">&gt;</a>
<a href="#">Approve</a>	✓	10/3/2016	Lodging	!	191.96	Yes	191.96	No		<a href="#">&gt;</a>
<a href="#">Approve</a>	✓	10/3/2016	Coffee, Tea, Snacks	✓	5.82	Yes	5.82	No		<a href="#">&gt;</a>
<a href="#">Approve</a>	✓	10/4/2016	Meals	✓	93.11	Yes	93.11	No		<a href="#">&gt;</a>
Edit 11/30/2016, Dan Manager asks: Please change expense category - this should be Meals. 11/30/2016, Meredith Employee answers: Updated. Sorry!										
<a href="#">Approve</a>	✓	10/9/2016	Other Transportation	✓	2.75	Yes	2.75	No	!	<a href="#">&gt;</a>

Total Non-Reimbursable \$0.00

# Approving an Expense Report

The preview of the message for the next approver will appear. The next approver is **Accounts Payable**. If you need to, you can enter a comment, then click Submit to complete the approval process.

This is a preview of the message that will be used to submit the expense report. You may add your own comments if you like.

**To** Annie Accountant (aaccountant@circp1.com)  
**Subject** Expense Report Reimbursement Request From Dan Manager (dmanager@circp1.com)  
**Body** Hello Annie,

Dan Manager (dmanager@circp1.com) has sent an expense report for reimbursement.

Enter your comments:

Parking meter line is missing a receipt, but I approved because it was under \$20.00.

Expense Report Summary

Employee: Meredith Employee (memployee@circp1.com)  
Expense Report Name: ReportExecutive - 10/1/2016 - 10/15/2016  
Dates: 10/1/2016 - 10/15/2016

Non Reimbursable Total: \$0.00  
Reimbursable Total: \$413.48  
Disapproved Total: \$0.00  
Total: \$413.48

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

# Approving an Expense Report

A fully approved expense report will be removed from your **Approval Request** queue.

The screenshot displays the Certify user interface. At the top left is the Certify logo with the tagline "travel & expense made easy". The top right navigation bar includes "My Approval Requests" (with a dropdown menu showing "Dan Manager"), "My Account", "Support", and "Logout". Below this is a secondary navigation bar with "Home", "Travel", "Wallet", and "Analytics".

The main content area is divided into several sections:

- My Certify Wallet:** Shows "Your wallet is empty" and "Add receipts or expenses to your Wallet." with "0 ITEMS" at the bottom.
- My Expense Reports:** Features a "New Expense Report" button and a list of report statuses: "Drafts", "Pending Approval", "Pending Payment", and "Archived", each with a "0" count.
- Approval Requests:** A box with the title "Approval Requests" and a "0" count, highlighted with a red box and a red arrow pointing to it from the right.
- What's New In Certify:** Includes a link to "Read the Certify Updates Blog".
- SpendSmart™:** States "There are no recent ratings to display." with a link to "Ratings & Reviews".
- Add Receipts:** Offers three methods: "MOBILE", "EMAIL", and "UPLOAD", with a "MORE METHODS" link at the bottom.
- Schedule Expense Reports:** Features a "ReportExecutive™" icon and text: "ReportExecutive™ is off. Meet your fully automated expense report." with a "CONFIGURE ReportExecutive™" link at the bottom.

# 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 who has Signature Authority should be timely in approving the expense report reimbursement or returning them to the Traveler for correction.

Approver 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

## CI TRAVEL 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 contact [karina.cruz@csuci.edu](mailto:karina.cruz@csuci.edu) to enroll in direct deposit for travel reimbursement.

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

# Contact Information

Booking – Karina Cruz – [karina.cruz@csuci.edu](mailto:karina.cruz@csuci.edu) 805-437-8581

Expense Reimbursement – [CIAP@csuci.edu](mailto:CIAP@csuci.edu) 805-437-3700