Division of Business and Financial Affairs

Certify Travel Program
Process Guide
Basic User – Employee/Traveler
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Information

Certify is CSU Channel Islands new travel expense management system. The cloud based interface mobile application will allow employees to book travel, save and submit electronic receipts, complete expense reports, and receive reimbursement quickly.

A Basic User in Certify is defined as a user with the Employee role that creates and submits their own expense reports.

All Domestic and International travel will need to be submitted via the Certify System.

Timeline

Expense Report Reimbursement Request must be submitted by the Employee for approval to their Manager 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 Employee/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.

Process

Log-in

Log into Certify: https://www.certify.com/Login.aspx
**Single Sign-on**

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

Shorter version for your convenience is URL:  
http://go.csuci.edu/travel

Enter your CSUCI email address and password, click Login.

---

**My Account Details**

Your **My Account** page in Certify contains account information specific to you. This contains your department, email address, vendor ID etc. While using Certify, there might be times when this information needs to be updated. This is managed internally by CI’s Certify Booking Administrator Karina Cruz and you can contact her at: karina.cruz@csuci.edu 805-437-8581.
Step 1: On your homepage, click on My Account.

Step 2: On your homepage, click on Support. On the lower left section of the Support page, you will find the contact information for CI’s Certify Administrator. On the middle section, you will find Certify Training Camp. Certify Training Camp will allow New users start to learn the basics of Certify. Watch videos and attend a live training webinar.
Click on **Browse Help Center**, under **How can we Help?** Enter a search term or keyword for help.
Method of Adding Receipts to your Wallet

- Uploading Receipts
- Emailing Receipts
- Adding Receipts Using Certify Mobile

**Uploading Receipts**

Uploading receipt images from your computer is a quick and convenient method for adding receipts to your My Certify Wallet. 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.

**Steps to upload receipt from your computer**

**Step 1:** On your account homepage, under Add Receipts, click Upload.
Step 2: On the Add Receipts and Expenses page, select Choose Files.
Step 3: Select the receipt images from your computer. Click Open once you have selected all the receipt images you want to upload.

**Best Practice:** Windows users can select multiple images at once by pressing the CTRL key and selecting each file.
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 receipts have now been added to your **My Certify Wallet**. Uploaded receipts display the **Upload** icon in the **Source** column.

The **Upload** feature uses **ReceiptParse**, which scans the receipt image and can **pre-populate** the **Vendor**, **Category/Details** and **Amount** fields for you in the actual expense report. If you need to make additions or edits to those fields, you can manually change them using the **Edit Item** button (see pencil).
Emailing Receipts

Email is a quick and convenient method for adding receipts and expenses to your Certify Wallet. Email your receipt attachments to receipts@Certify.com. The receipts or expense data will be automatically parsed and be added to your Certify Wallet. Certify Wallet knows to parse and add receipts to your Certify Wallet based on your CSUCI email address that is set up in My Account. That email address is set up by the Certify Administrator. You can then email receipts from your computer’s email service, or from a mobile device with email capabilities. If you are sending receipts from alternate email addresses, you may Add an Additional Email Address to your Certify account. Below are the steps to email receipts and expenses to your Certify Wallet.

Step 1: Create a new email using your campus email service. In the To field, enter receipts@certify.com. In the Subject line, enter the receipt name. Alternatively, if a vendor has emailed you a receipt, you can forward the emailed receipt to receipts@certify.com.
Step 2: Attach 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. If you would like to review the
receipts or expenses that were added to your Certify Wallet, log into your Certify account to view your Wallet.

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. Below are the steps how to add receipts in the Certify Mobile app and sync them to your My Certify Wallet.

**Step 1:** Open the Certify Mobile app on your mobile device. Log in with your Certify Username and Password. Your username and password for Certify Mobile are the same as your login credentials you use to log into www.certify.com.
Certify Login

Username: elliemployee0001@gmail.com
Password: ***************

Save Password: Yes

Login

Lost Password
Use My Company Login
How Does Certify Work?
Step 2: On your **Certify Mobile** home screen, tap **Add Receipt**.
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

*Please Note:* To add *multiple* receipts at a time to your **Certify Wallet**, use the Upload or Email options available in your online Certify account at www.certify.com.
Step 4: The camera screen opens. 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.
Step 5: On the next screen, tap **Use Photo** to save the receipt image.
**Step 6:** On the next screen, tap **AutoFill** to scan the receipt image and populate the expense detail fields.
**Step 7:** If needed, make edits to the expense data by tapping the field you want to edit, entering the data, and tapping **Done** to save your edits.
**Step 7:** Tap **Save** to save the receipt information.

<table>
<thead>
<tr>
<th>Date</th>
<th>Jun 9, 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>General &amp; Admin</td>
</tr>
<tr>
<td>Category</td>
<td>Meals</td>
</tr>
<tr>
<td>Amount</td>
<td>11.12 USD</td>
</tr>
<tr>
<td>Vendor</td>
<td>Aurora</td>
</tr>
<tr>
<td>Location</td>
<td>Portland, ME</td>
</tr>
<tr>
<td>Attendees</td>
<td>Self</td>
</tr>
<tr>
<td>Reason</td>
<td></td>
</tr>
<tr>
<td>Reimbursable</td>
<td>Yes</td>
</tr>
<tr>
<td>Billable</td>
<td>No</td>
</tr>
<tr>
<td>Policy</td>
<td>Meets Policy</td>
</tr>
</tbody>
</table>

![Receipt screenshot with Save and Cancel buttons highlighted]
Step 8: On your Certify Mobile home screen, tap Sync to upload the receipt and add it to your My Certify Wallet.

*Please Note:* If you find you uploaded a receipt in error, you can easily delete it. See Deleting Receipts Using Certify Mobile.

If you have ReportExecutive enabled, receipts in your My Certify Wallet are automatically added to an expense report for you. Alternatively, you can use the Certify Mobile Auto Expense Report Wizard to create an expense report on your mobile device.
The receipt(s) will now be available in My Certify Wallet.

Reviewing Receipts & Expenses in Your Certify Wallet

The Certify Wallet is where all captured receipts and imported credit card expenses are stored before they are added to an expense report. Below are the steps that shows you how to review the items in your Certify Wallet.

On your account homepage, select More Items under My Certify Wallet.
Within the Wallet, you have several options:

**Viewing Receipts** - View a specific receipt image by clicking the view (document) icon next in the Receipt column.

**Changing a Name** - Change the name of an item by clicking the edit (pencil) icon next to the **Merge** button, entering the new name in the field provided, and clicking the save (disk) icon to save your changes.

**Deleting an Item** - Delete an item by selecting the receipt or expense, and click **Delete** at the bottom.

*Please note: If an item is deleted, it cannot be recovered.*

*Please Note: Karina Cruz in Purchasing is the Certify Administrator can make imported credit card expenses read-only, meaning that you will not be able to edit or delete them.*
**Edit Details** - To make edits to the actual details, such as Vendor Name, Date, or Expense Category, open the little arrow in the Category/Details button to show the individual edit button.

**Add to Report** - Add receipt and expenses to an expense report by selecting the checkbox next to each item you want to add, and then selecting **Add to Report** at the bottom of the page.

**View Full Image, Zoom, and Rotate** - View the full receipt image in a new browser window by clicking the document icon in the **Receipt** column; you can then **Zoom In**, **Zoom Out**, or **Rotate** the receipt image.
Edit Description - Edit the description for the item.

Detailed View - Expand all available details for all items in the Wallet.

Upload Receipts - Click the upload icon in the upper right-hand corner to access all methods to add more receipts to your wallet.

Refresh - Use the refresh icon in the upper right-hand corner to refresh your wallet.

Merge - This optional view combines receipts and expenses in your Wallet together into one section. It will merge matching receipts and credit card expenses.
Creating a New Expense Report

The New Expense Report button will allow you to create an expense report anytime, on-demand. It automatically retrieves receipts and expenses from your Certify Wallet and adds them to a new or existing expense report, linking the receipts and expenses with matching dates and amounts. Below are the steps that shows you how to Create a New Expense Report.

Step 1: Add receipts and expenses to your Certify Wallet.
Step 2: Select *New Expense Report*

![Certify interface with highlighted New Expense Report button](image-url)
Step 3: Select one of the options provided. After selecting an option, click **Next**.

**Create a New Expense Report**

What would you like to do?

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

Back  Next

Step 4: On the next page, complete all of the bold fields. Click **Next**.

**Create a New Expense Report**

Enter expense report information

- Expense Report Name: October 2016
- Billable to Client: 
- Start Date: 10/1/2016
- End Date: 10/31/2016
- Description

Back  Next
Step 5: The confirmation screen displays the number of receipts and expenses that are within the date range you provided in Step 4. Click Next to create the expense report.

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: 5

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.

Step 6: On the My Expense Report page, review the expense report. Use the Link Receipts Wizard, Clean Up Wizard, or add other expenses as needed. When finished, select Submit for Approval to complete the submission process.
Expense Report Cleanup

Certify’s Cleanup Wizard is a simple tool that allows you to review and edit all expenses that Need Attention. Below are the steps that shows you how to use the Cleanup Wizard tool.

**Step 1:** On your account homepage, under My Expense Reports, select Drafts.
Step 2: Select the Name of the expense report you want to open.

Step 3: Each expense that Needs Attention will have a small red flag next to the expense line in the Expense column. This signifies that the expense is missing some required fields or information which needs to be reviewed. Select Cleanup Wizard.
Step 4: A red message and a corresponding red outline will notify you which expense fields need to be reviewed and edited. If there is no red text or outline, verify that the expense data is correct. If there is another expense for review, click Next. To save your changes and close with wizard, click Finish.
Step 5: Once all of the expenses that **Need Attention** have been reviewed and edited, and the small red flags have been removed, select **Submit for Approval**.

*Please Note*: If expense report has a red message when submitted to the approver, the approver will then send an inquiry to the traveler as to why it was not completed. This could delay approval and then possibly payment.

---

**Creating a Mileage Expense**

Certify allows you to enter mileage for a personal vehicle driven for university business. The IRS sets annual allowable rates for standard business mileage. Below are the steps that shows you how to create a one-way or segmented mileage expense using the **Add Expense** function within an existing draft expense report.

**One-Way and Round Trips**

**Step 1**: On your account homepage, under **My Expense Reports**, select **Drafts**.
Step 2: Under **My Expense Reports**, click the **Name** of the expense report you want to open.

Step 3: In the **Add Expense** box below the expense report, enter the expense information and select the appropriate mileage expense **Category**.
Step 4: When a mileage expense Category is selected, additional information is required. Enter the departure location in the From field, and the destination location in the To field. Select Map It! to have the mileage automatically calculated for you. Additionally, MapQuest will create a mileage map to use as a receipt when Map It! is selected. Click the checkbox for Round Trip to calculate a two-way distance. When all mileage information has been entered, click Save.
**Step 5:** The reimbursable amount will be automatically calculated based on the CI Travel Policy. To view the rate applied to your mileage expense, click the arrow (>) in the **Details** column for the mileage expense line.
Segmented Trip – More than one destination to be added to the expense report

Step 1: In the Add Expense box below the expense report, enter the expense information and select the appropriate mileage expense Category.

Step 2: When a mileage expense Category is selected, additional information is required. Enter the departure location in the From field, and the destination location in the To field. Select Map it! to have the mileage automatically calculated for you. Enter all remaining information in the fields provided, deselect Round Trip, and select Add Segment for a multi-stop trip.
Step 3: The first segment of the trip will be added to the expense report and the expense information for the next segment of your trip will be partially completed in the Add Expense box. Enter the destination in the To field, select Map It!, and edit other details as needed. Select Add Segment to add another segment to your trip or click Save to complete the trip.
Reimbursable and Non-Reimbursable Status

**Reimbursable** - An expense should be classified as reimbursable if it is something a user paid out of pocket and needs to be reimbursed by the campus; any expenses charged to a campus credit card should be classified as reimbursable.
Non-Reimbursable - An expense is classified as non-reimbursable if the user does not expect to be reimbursed; anything charged on a campus credit card should be classified as non-reimbursable.

### Edit Expense

<table>
<thead>
<tr>
<th>Date</th>
<th>10/3/2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>General &amp; Admin</td>
</tr>
<tr>
<td>Category</td>
<td>Coffee, Tea, Snacks</td>
</tr>
<tr>
<td>Amount</td>
<td>5.82 United States Dollars</td>
</tr>
<tr>
<td>Vendor</td>
<td>Starbucks</td>
</tr>
<tr>
<td>Location</td>
<td>Portland, ME</td>
</tr>
<tr>
<td>Attendees</td>
<td>me</td>
</tr>
<tr>
<td>Reason</td>
<td>Needed coffee</td>
</tr>
<tr>
<td>Reimbursable</td>
<td>I paid for this, please reimburse me.</td>
</tr>
<tr>
<td>Billable</td>
<td>The company paid, do not reimburse me.</td>
</tr>
<tr>
<td>Receipt</td>
<td>Change</td>
</tr>
</tbody>
</table>

Click on the dropdown under **Reimbursable** and note whether it is “reimbursable” or “non-reimbursable”. Then click **Save**.

## Splitting an Expense

Some expenses may need to be split into two or more categories, departments, or projects. For example, a lodging fee may also include meals or parking expenses. Below are the steps that shows you how to use the **Split Expense** function in Certify.
Step 1: On your account homepage, select **Drafts**.

Step 2: Select the **Name** of the expense report you want to open.

Step 3: Click the arrow (>) next to the expense you would like to split. This will open the **Other Actions** menu. In the **Other Actions** menu, select **Split Expense**.
Step 4: On the next page, enter the **Amount** you would like to split. The split amount will be subtracted from the full, original expense amount. You can also make edits to the other expense fields as needed.
The receipt image attached to the original expense will also be attached to all of the split expenses. If you would like a different receipt image to be attached to a split expense, click the green checkmark under the Receipt column. A dropdown menu will open where you can select a different receipt image to attach to the split expense. Click Split Again to continue splitting the current expense. When you have completed splitting the expense, click Save.

Step 5: On the next page, you will see that the original expense and the split expense(s) will be linked together by a dotted line under the Expense column in the expense report.
International Travel

Employees planning to travel to foreign destinations must request and obtain approval from CSU Channel Islands President or her designee prior to making any travel arrangements. No exceptions will be made. International travelers should contact the campus Risk Management Office for guidance and insurance coverage at least thirty (30) days prior to departure. International travel to areas on the current State Department’s Travel Warning list or those deemed high hazard risk requires advanced approval from the President (RM2014-01). The President must obtain advanced authorization from the CSU Chancellor for international travel to high hazard countries. Travel to international destinations considered a “War Risk” must be submitted to the Chancellor’s office for approval after campus approvals are obtained.

Travel Authorization

A Travel Authorization is only required for international and international group travel. The Travel Authorization form approves an employee or other traveler to make purchases on behalf of CSUCI prior to and during the travel period. In the case of employees, it also documents that they are on official business for insurance purposes. The Travel Authorization documents that the traveler will be reimbursed for actual out-of-pocket expenses in compliance with the limits set by the CSUCI travel procedures or any additional restrictions set by the traveler’s department. The Travel Authorization form is also required to obtain bookings for airfare and rental car using Certify.
The completed and approved Travel Authorization form needs to be uploaded/attached to Certify when claiming reimbursement. Per CSU procedure/regulations, this original form must be sent to Accounts Payable Office prior to receiving reimbursement payment.

### International Travel Authorization

<table>
<thead>
<tr>
<th>Employee</th>
<th>Student</th>
<th>Student Assistant</th>
<th>Volunteer</th>
</tr>
</thead>
</table>

- **Full Name of Traveler:**
- **Phone:**
- **Date:** 05/30/2017
- **Prepared by & Ext. (other than the traveler):**

#### Select Travel Type:
- [ ] International
- [ ] International Group

- **Travel Departure Date:**
- **Business Purpose:**
- **Travel Return Date:**
- **Travel Details:**
- **Will any personal days be taken during this travel?**
  - [ ] Yes
  - [ ] No
  - **Dates/Details:**
- **Does the traveler have a completed CA STD 261 for the current year?**
  - [ ] Yes
  - [ ] No
  - **(Sign original, email copy to Risk Management each ye.)**

#### Approved Travel Methods & Estimated Expenses:

<table>
<thead>
<tr>
<th>Travel Method Costs</th>
<th>Amount</th>
<th>International Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>Lodging</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Meals</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Incidentals</strong></td>
</tr>
</tbody>
</table>

- **Airfare Cost ("Coach Class")**
- **Rental Car Cost**
- **Shuttle Cost**
- **Mileage, Round Trip (in miles)**
- **Registration/Training Fee Cost**
- **Misc./Other Cost-Tolls, Parking, etc.**

---

**International Travel - please see page 2 of this form. The Foreign Travel Insurance Request form has been provided as a convenience. Copies of this authorization and the following page will be submitted to Risk Management. Please see instructions for more details.**

**Comments / Supervisor Restrictions:**

- **Estimated Trip Cost:**
- **"Not to Exceed" budget restriction (if applicable):**
- **Total Trip Cost with "not to exceed" applied:**

**Source of Funding:**

<table>
<thead>
<tr>
<th>Account</th>
<th>Fund</th>
<th>Department</th>
<th>Program</th>
<th>Class</th>
<th>Project</th>
<th>Amount</th>
</tr>
</thead>
</table>

---

**HEREBY CERTIFY the above travel is necessary to conduct official business on behalf of CSU Channel Islands and agree to submit my Travel Expenses claim within 90 days from the return date. In driving a vehicle for official uses, I have completed all policies regarding driving on University business and have completed defensive driving training. APPROVAL: I am authorized to approve this travel reimbursement as it serves a CSU business purpose and I certify that adequate funds are available.**

**Traveler's Signature:**

**Date:**

**All travel outside of the United States (International) must be approved in advance by the CI President.**

**International Travel Approved:**

**Approval Date:**
International Travel pertaining to Lodging, Meals and Incidental expenses are limited to the per diem set by the U.S. Defense Travel Management Office (DTMO).
Creating a Federal Per Diem Expense

Certify has integrated the Federal Per Diem rate. Below are the steps that shows you how to create expense using the Federal Per Diem rate for international travel.

Step 1: On your account homepage, create a new expense report or open an existing Draft expense report.
Step 2: In the **Add Expense** box, select a 606002 – (Lodging International) **Category** from the dropdown menu.

- **Date**: 1/2/2018
- **Department**: 920101 - Fiscal Services
- **Category**: 606002 - Lodging (International)
- **Destination**: 
- **Business Unit**: 
- **Fund**: 
- **Program**: 
- **Project**: 
- **Hotel**: 
- **Location**: 
- **Check-in**: 
- **Check-out**: 
- **Reason**: 
- **Reimbursable**: I paid for this, please reimburse me.
- **Receipt**: Select

[Save] [Cancel]
Step 3: Start typing in the **Destination** field until a list of search results are displayed; select the **Destination** from the search results list. If your destination is not displayed in the list, select **Unlisted**.
Step 4: Enter the remaining expense details. When all details have been entered and then click **Save**.

**Add Expense**

- **Date**: 1/2/2018
- **Department**: 920101 - Fiscal Services
- **Category**: 606002 - Lodging (international)
- **Destination**: ITALY - Florence
- **Business Unit**: CICMP - CSU Channel Islands
- **Fund**: GD901 - CI ~ Operating
- **Program**
- **Project**
- **Hotel**: Hilton
- **Location**: ITALY
- **Check-in**: 1/1/2018
- **Check-out**: 1/2/2018
- **Reason**: travel
- **Reimbursable**: I paid for this, please reimburse me.
- **Receipt**: Select

**Step 5**: The reimbursable amount will be automatically calculated based on the destination selected per the Federal Per Diem rate.
Federal Per Diem for International Meals and Incidentals

Step 1: On your account homepage, create a new expense report or open an existing Draft expense report.
Step 2: In the **Add Expense** box, select a 606002 – (Meals and Incidentals International) **Category** from the dropdown menu.

Step 3: Enter the remaining expense details. Click the **Travel Day** checkbox if you are reporting meal expenses for a day you traveled. This checkbox will only be available for certain Federal Per Diem meals and incidentals expense categories. If not, leave **Travel Day** blank. When all details have been entered, click **Save**.
Step 4: The reimbursable amount will be automatically calculated based on the destination selected and the Federal Per Diem rate reimbursement.
Submitting an Expense Report

After creating and editing a new expense report, it will need to be submitted for approval. Below are the steps that shows you how to submit an expense report for approval.

**Step 1:** Start with your expense report open, or, select **Drafts** on your account home page.

**Step 2:** Select the **Name** of the expense report you want to open.

**Step 3:** After your final review and edits, click **Submit for Approval** in the upper right-hand corner.
Step 4: Click Yes in the next window.

I certify this expense report is true and accurate.

Are you sure you want to submit this expense report?

Yes  No

Step 5: Dependent on your department’s workflow configuration, you will do one of the following:

- **Step 5a: View and Submit Expense Report for Approval** – you will view the approver that has been pre-assigned, and who will receive your expense report next
Submit Expense Report for Approval

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: Jon Manager (jmanager@circp1.com)
Subject: Expense Report Approval Request From Kelly Employee (kemployee@circp1.com)
Body: Hello Jon,

Kelly Employee (kemployee@circp1.com) has sent an expense report for your approval.

Enter your comments:

Expenses Report Summary

Employee: Kelly Employee (kemployee@circp1.com)
Expense Report Name: October 2017
Dates: 10/1/2017 - 10/9/2017

Non Reimbursable Total: $0.00
Reimbursable Total: $226.36
Total: $226.36

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

OR:

- **Step 5b: Enter** the approver by clicking in the search box. Click **Next**.
Submit Expense Report for Approval

Select a manager, executive or accountant from your organization. Managers and executives can approve expense reports and then forward them to accountants for reimbursement and processing.

Select an Approver: on Manager (jmanager@circp1.com)  Show All Approvers

Step 6: Enter any extra comments, and click Submit.
Submit Expense Report for Approval

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: Jon Manager (jmanager@circp1.com)
Subject: Expense Report Approval Request From Kelly Employee (kemployee@circp1.com)
Body: Hello Jon,

Kelly Employee (kemployee@circp1.com) has sent an expense report for your approval.

Enter your comments:

Sorry a little late!

Expense Report Summary

Employee: Kelly Employee (kemployee@circp1.com)
Expense Report Name: October 2017
Dates: 10/1/2017 - 10/9/2017

Non Reimbursable Total: $0.00
Reimbursable Total: $226.36
Total: $226.36

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

Submit Cancel
You will find expense report workflow updates within the **Pending Approval** section of your **My Reports** box.

Printing an Expense Report

Certify provides a printer-friendly version of your expense reports should you prefer to keep hard copies. Below are the steps that shows you how to use the **Print Report** feature.

**Step 1:** On your account homepage, select the option under **My Expense Reports** that contains the expense report.
Step 2: Click the **Name** of the expense report you would like to print.

**Step 3:** Select **Print Report**, located below the **Summary** section. If the expense report is currently located in your **Drafts** folder, the **Print Report** option will be located below **Submit for Approval** link.
### My Expense Report

<table>
<thead>
<tr>
<th>Status</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>General &amp; Admin (01)</td>
</tr>
<tr>
<td>Summary</td>
<td>Kelly Employee</td>
</tr>
<tr>
<td></td>
<td>October 2016</td>
</tr>
<tr>
<td></td>
<td>10/1/2016 - 10/31/2016</td>
</tr>
</tbody>
</table>

### Approval History

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/8/2016</td>
<td>Submitted</td>
<td>Kelly Employee</td>
</tr>
<tr>
<td>11/9/2016</td>
<td>Approved</td>
<td>Dan Manager</td>
</tr>
<tr>
<td>11/9/2016</td>
<td>Approved</td>
<td>Annie Accountant</td>
</tr>
<tr>
<td>11/8/2016</td>
<td>Processed</td>
<td>Annie Accountant</td>
</tr>
<tr>
<td>11/8/2016</td>
<td>Approval Code: 93</td>
<td></td>
</tr>
</tbody>
</table>

#### Print Report

**Step 4:** You may now print the report using the browser print functionality. Click the checkboxes to **Include receipt images** and/or **Include analysis chart**. Additionally, you may select the options **Export to Excel** or **View as PDF**.

**Please Note:** If the expense report contains PDF images, we recommend printing from the **View as PDF** option.
## Direct Deposit

Direct deposit is the fastest and most convenient way of being reimbursed. Please contact 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  805-437-8581

Expense Reimbursement - CIAP@csuci.edu 805-437-3700
Glossary

Submitter – Refers to Employee submitting an expense report.

Approver – Refers to Manager, which have current delegated authority to approve the travel reimbursement expenses.

Accounts Payable – Refers to an Accounting Staff whom reviews/audits/approves and disapproves expense reimbursement requests.