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# Channel Islands

CALIFORNIA STATE UNIVERSITY

Division of Business and Financial Affairs

## Certify Travel Program Process Guide Booking

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## Information

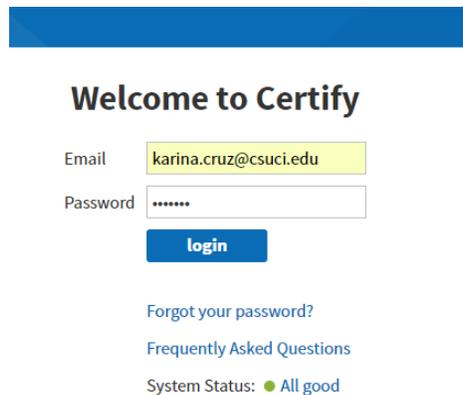
[Certify](#) is CSU Channel Islands new expense management system. The cloud based interface mobile application will allow employees to book travel, save and submit electronic receipts, complete expense reports, and receive reimbursement quickly. Certify partners with AmTrav allowing employees to book flights, hotels, and car reservations quickly and effortlessly.

## Timeline

Employees can book business travel Monday-Thursday. Managers have 24 hours to approve travel reservations, except on holidays. Travel reservations not approved within the 24 hour period will automatically be canceled.

## Process

Log into Certify: <https://www.certify.com/Login.aspx>  
Enter your CSUCI email address and password. Click Login.



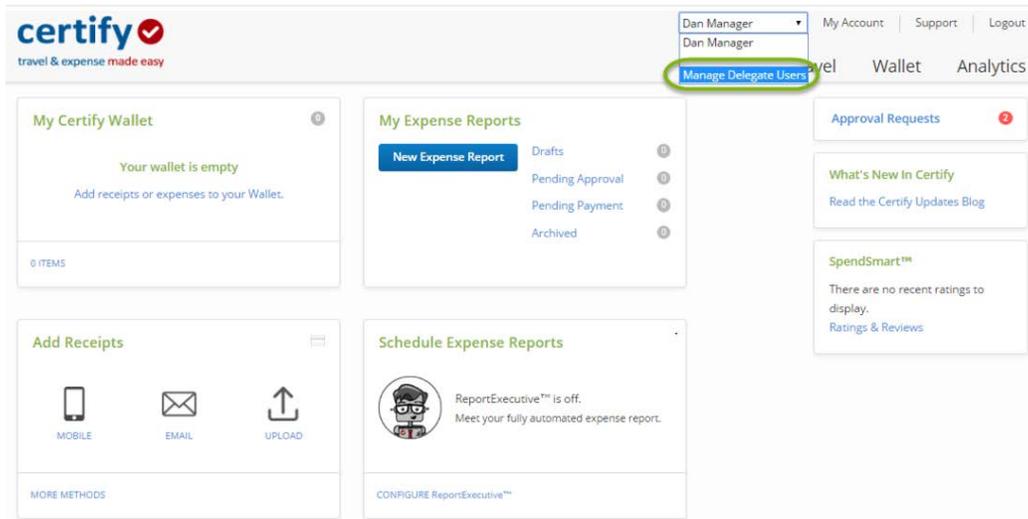
The screenshot shows the Certify login interface. At the top is a blue header bar. Below it, the text "Welcome to Certify" is centered. There are two input fields: "Email" with the value "karina.cruz@csuci.edu" and "Password" with masked characters "\*\*\*\*\*". A blue "login" button is positioned below the password field. Underneath the button are three links: "Forgot your password?", "Frequently Asked Questions", and "System Status: ● All good".

## Assigning and Managing Delegate Users

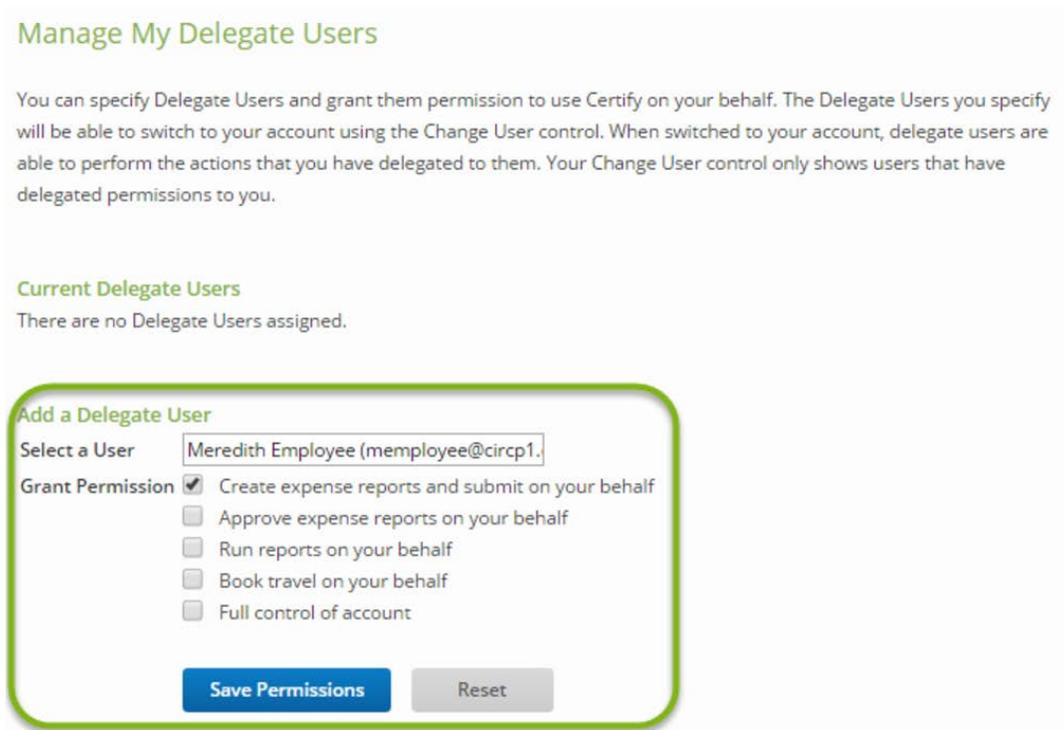
Certify allows users to designate other users with a CSUCI Certify account (student assistants are not allowed to book on behalf of employees) to act on their behalf within Certify.

### *Adding a Delegate*

On your Certify account homepage, next to **My Account**, click the box with your name and select **Manage Delegate Users** from the dropdown menu.



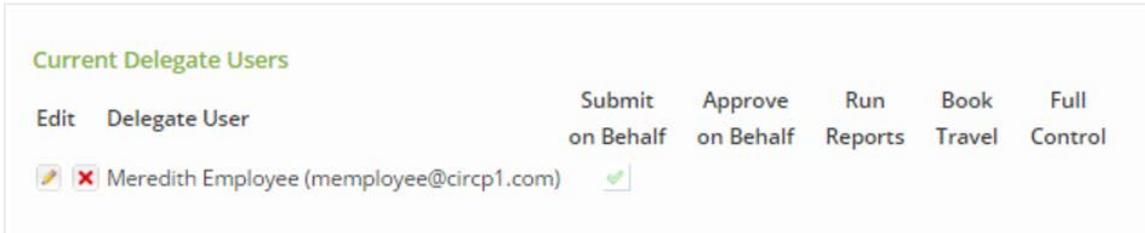
On the **Manage My Delegate Users** page, enter the last name and the first name of the user(s) you would like to assign **Delegate User** privileges to into the field provided



On the **Grant Permission** area, click the checkbox for each activity you would like the **Delegate User** to have permission to do on your behalf.

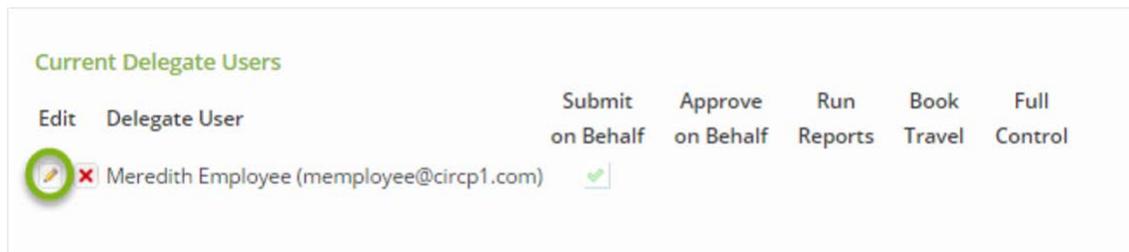
Click **Save Permissions**.

After saving, you will see the **Delegate User** name(s) under **Current Delegate Users**, as well as a list of granted permissions based on your selection on the previous page.



### Edit Delegate User Permissions

To make changes to a **Delegate User's** permissions, click the edit (pencil) icon at the left of the **Delegate User's** name. Click or deselect the checkbox for each permission you would like to grant or revoke. Select **Save Permissions** to continue.



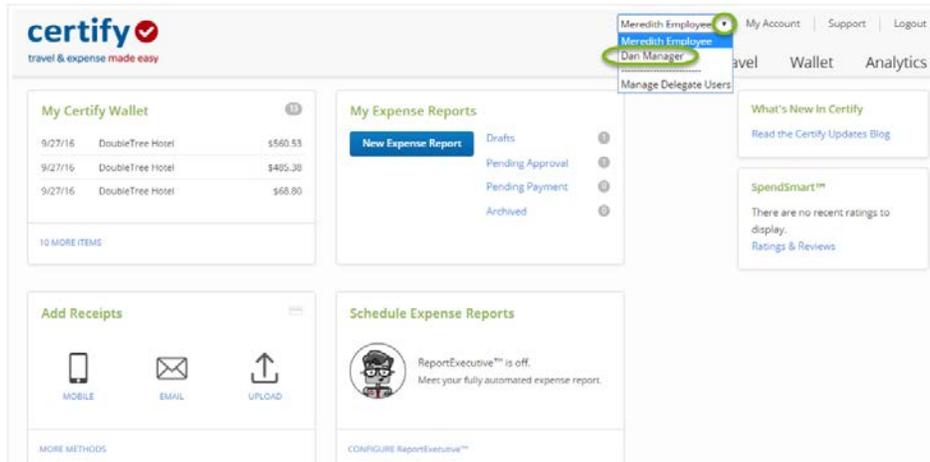
### Remove a Delegate User

To remove a **Delegate User**, click the red **x** to the left of the **Delegate User's** name. A popup will ask if you are sure you want to revoke permissions for the **Delegate User**. Click **Ok** to continue. The **Delegate User** you removed will no longer appear under **Current Delegate Users** or in the dropdown menu at the top of your Certify account homepage.

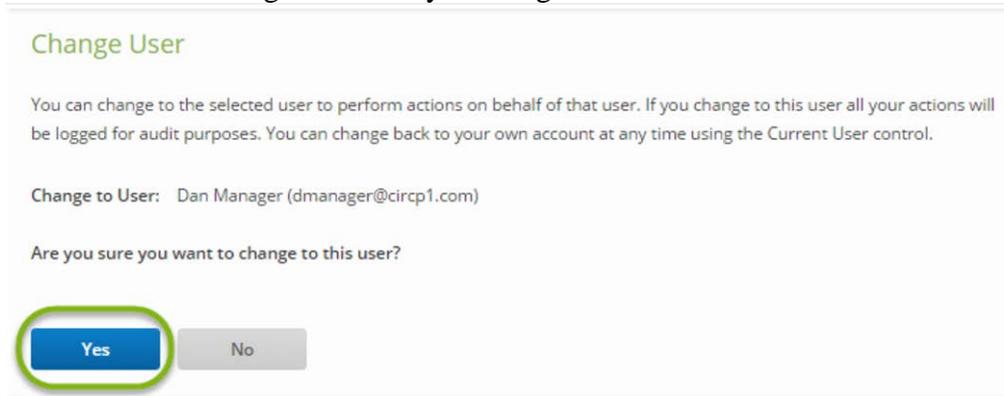


### Acting as a Delegate User

To act as delegate, the user first needs to grant you permission. On your Certify account homepage, next to **My Account**, click the box with your name and select from the dropdown menu.

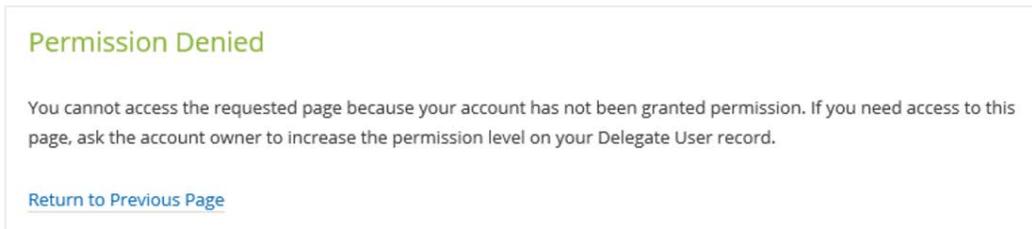


Confirm that you would like to change the user by clicking **Yes**.



You now have access to act on behalf of another user.

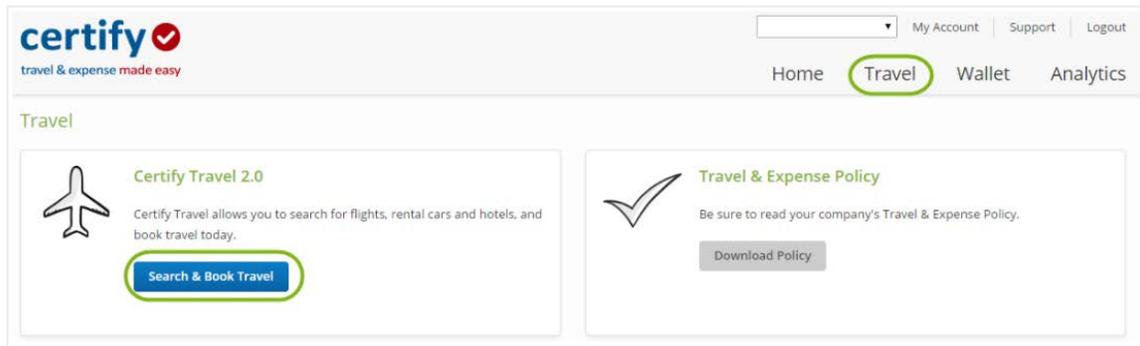
If the other user has not granted you permission to act on their behalf, you will receive a **Permission Denied** notification.



## Booking Travel

The emailed itinerary will automatically forward into your Certify Wallet.

On your account homepage, select **Travel**, and then select **Search & Book Travel**



The Certify travel page will direct employees to the **AmTrav** page.

\*Please note that **AmTrav** charges a \$29 fee for booking, cancelling, or making changes to a reservation through an **AmTrav** agent. The travel agency will charge the additional fee to the traveler’s personal credit card. Travelers should be using their online Certify account or mobile app for all travel related items to avoid the \$29 agent fee.

### Airfare

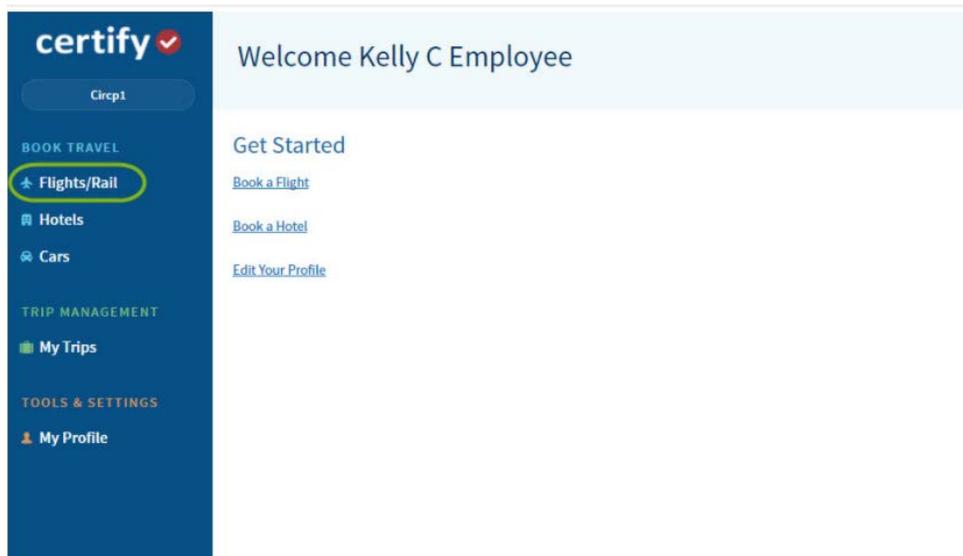
CSUCI business travel must follow the [CI Travel Procedures and Regulations](#).

\*To book *International Travel*, the traveler must submit a *Travel Authorization form* signed by the University President or Chief of Staff prior to booking.

\*Per the [California Legislature AB 1887](#) the following state are subject to CA ban on state-funded and state-sponsored travel:

Alabama, Kansas, Kentucky, Mississippi, North Carolina, South Dakota, Tennessee, and Texas

To book airfare, on the left panel, click **Flights**



\*If another user has granted you authority to book on their behalf select the appropriate **Traveler Name** from the dropdown menu at the top right hand corner of the **Book a Flight or Train** page.

Enter the city, town, or airport in the **From** and **To** Fields, along with the departure and return dates.

Click **Search Flights**

**Choose an Airline and a Departure Flight**  
Los Angeles to Orlando - Tue June 13, 2017

Modify/Cancel LAX → OML Jun 13 OML → LAX Jun 16 Purchase

All Airlines Non-Stop \$349	Frontier Non-Stop+ \$372	United Non-Stop+ \$397	Delta Non-Stop+ \$426	American Non-Stop+ \$480	jetBlue Non-Stop+ \$506	Sun Country 1 Stop \$534	Southwest 1+ Stops \$668	Alaska Non-Stop+ \$763
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**LEG 1 Los Angeles to Orlando on June 13 - Choose your flight**

Filter Results: Stops - Airports - Departure Times - Display: [icon]

Price	Quality	Route	Departs	Arrives	Stops	Duration	Bags	Info
From \$349 Select	Frontier F9406-F9678	LAX → MCO	6:29 pm Jun 14	6:00 am Jun 14	1 Stop DEN	8h 31m	1st: \$25 2nd: \$30	Seat Map
From \$390 Select	Frontier F91630	LAX → MCO	10:15 pm Jun 14	6:13 am Jun 14	Non-stop	4h 58m	1st: \$25 2nd: \$30	Seat Map
From \$397 Select	United UA750-UA1873	LAX → MCO	6:00 pm Jun 14	5:11 am Jun 14	1 Stop DEN	8h 11m	1st: \$25 2nd: \$35	Seat Map
From \$404 Select	jetBlue B6132	LAX → MCO	9:57 pm Jun 14	5:59 am Jun 14	Non-stop	5h 2m	1st: \$20 2nd: \$35	Seat Map
From \$406 Select	Delta DL186	LAX → MCO	9:50 pm Jun 14	5:49 am Jun 14	Non-stop	4h 59m	1st: \$23 2nd: \$32	Seat Map
From \$453 Select	American AA325	LAX → MCO	3:25 pm Jun 14	11:33 pm Jun 14	Non-stop	5h 8m	1st: \$25 2nd: \$35	Seat Map

Confirm the details of your selected flights. The **Policy Status** will alert you if the selection is outside of company policy.

### Price Details

	Base Fare	Taxes	Total
Adult Traveler (1)	\$330.23	\$69.97	\$400.20
		<b>TOTAL</b>	<b>\$400.20</b>

\*All Fares exclusive of [baggage fees](#) and in U.S. dollars

### Trip Details

Portland, ME → San Diego, CA Monday, May 4

	<b>United #4905</b> Turbo-prop	From: <b>Portland, ME (PWM)</b> To: <b>Newark, NJ (EWR)</b>	<b>6:00am</b> <b>7:42am</b>	Economy Class
Flight Operated by Republic Airlines Dba United Express				
Connection in EWR/Newark, NJ				
	<b>United #1626</b> Boeing 737-900	From: <b>Newark, NJ (EWR)</b> To: <b>San Diego, CA (SAN)</b>	<b>8:30am</b> <b>11:44am</b>	Economy Class

San Diego, CA → Portland, ME Friday, May 8

	<b>United #1689</b> Boeing 737-800	From: <b>San Diego, CA (SAN)</b> To: <b>Washington/Dulles, DC (IAD)</b>	<b>10:40pm</b> <b>6:34am +1</b>	Economy Class
Connection in IAD/Washington/Dulles, DC				
	<b>United #4012</b> Canadair RJ 700	From: <b>Washington/Dulles, DC (IAD)</b> To: <b>Portland, ME (PWM)</b>	<b>8:06am</b> <b>9:42am</b>	Economy Class
Flight Operated by Mesa Airlines Dba United Express				

### Policy Status

 This booking is within policy.

### Terms

- Tickets are non-refundable, once purchased, and cannot be transferred to a different person.
- A fee of \$200.00 applies for itinerary changes plus any fare difference if you change to a more expensive itinerary.

[Continue](#)

Once the traveler has booked their airfare, their approver will approve or disapprove the request (Business Travel Only).

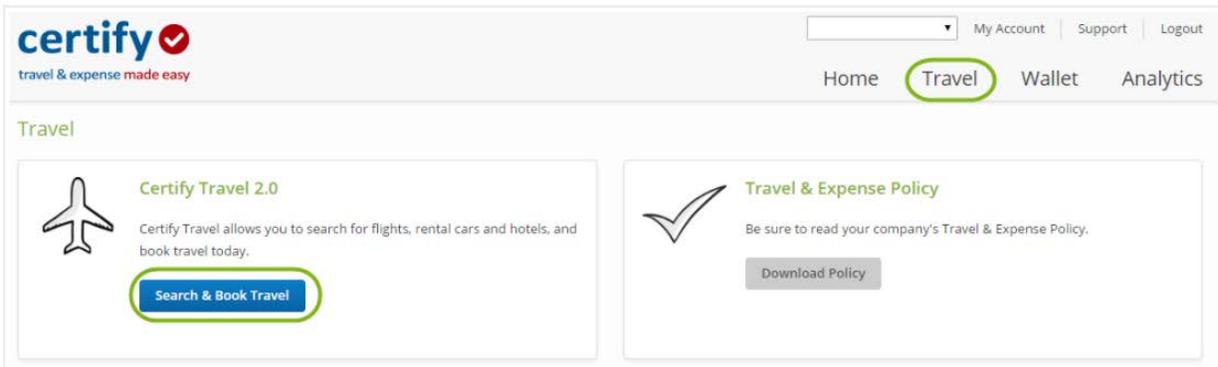
## Approving an Itinerary

Managers will have 24 hours to approve the booking on behalf of their department (except on holidays). Additionally, out of policy bookings will require approval by the University Controller, who will also have 24 hours to approve the booking on behalf of the university. The system will automatically cancel the itinerary if the approver does not approve the travel within the 24-hour window.

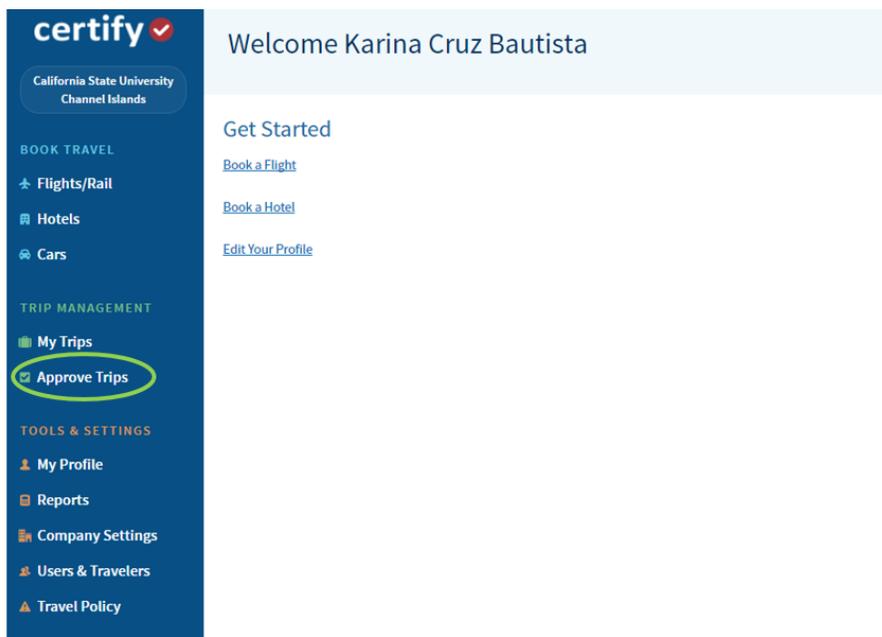
Business travel can be booked **Monday –Thursday** (with the exception of holidays). Approvers cannot approve bookings within the required 24-hour period if made the day before a holiday, on a holiday or on Fridays.

This section will show managers or designees how to approve an itinerary.

On your account homepage, select **Travel**, and then select **Search & Book Travel**



On the left panel, select **Approve Trips**.



To review the itinerary details, select Details button next to the itinerary in question.

**certify** ✓

Trips

TRAVELER (All Travelers)

✓	Reservation #	Title	Date	Traveler(s)	Price	
✓	1726403798	San Diego	Sep 25, 2017	Employee, Kelly C	\$427.78	<a href="#">Details</a>

Would you like to **Approve** or **Reject** selected trip(s)?

Review the itinerary detail, choose to **Approve** or **Reject** the itinerary.

**certify** ✓

Trip Details

Trip Summary

Booking Number:	1726403798
Trip Title:	San Diego
Airline Confirmation Numbers:	JPIWE4 (UA)
Status:	NEEDS APPROVAL ⓘ

Traveler Names

1 Kelly C Employee

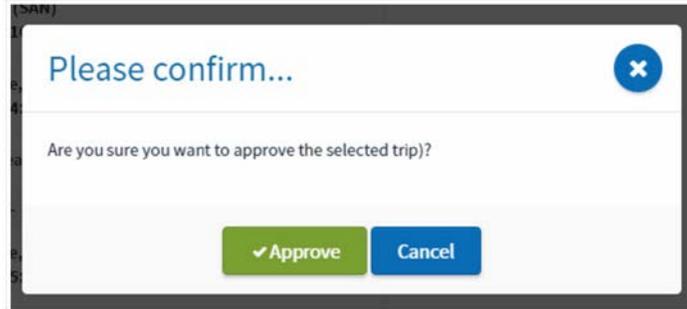
Itinerary

Portland, ME → San Diego, CA September 25, 2017

Southwest #563 Boeing 737-700 Duration: 1h 30m	Departs: Portland, ME (PWM) Mon, Sep 25 – 5:45am
	Arrives: Baltimore, MD (BWI) Mon, Sep 25 – 7:15am
	Seat(s): Economy – <a href="#">Seat Info</a> ⓘ
Connection in Baltimore, MD	
Southwest #1581 Boeing 737-800 Duration: 5h 20m	Departs: Baltimore, MD (BWI) Mon, Sep 25 – 8:25am
	Arrives: San Diego, CA (SAN) Mon, Sep 25 – 10:45am (Terminal 1)

Would you like to **Approve** or **Reject** this trip?

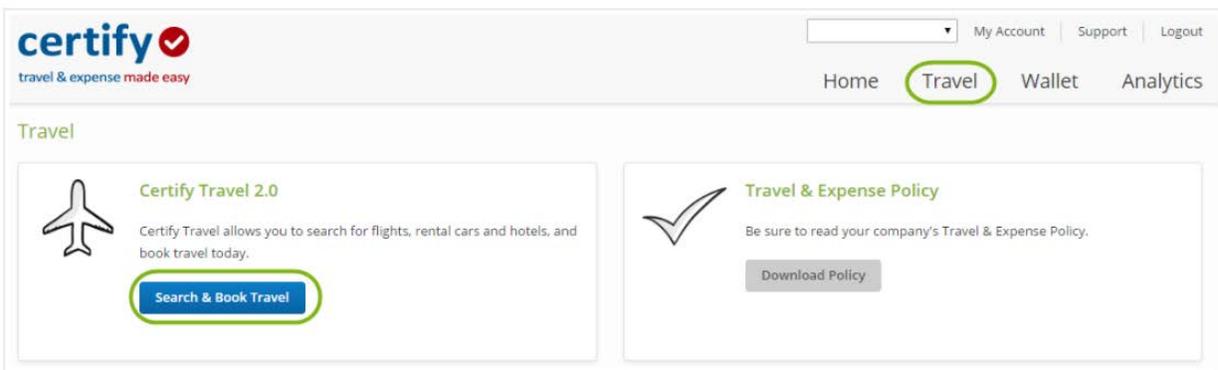
If the itinerary is **Approved**, the itinerary will be ticketed and the booking will be completed. If **Rejected**, the itinerary will be cancelled. If approver takes no action on the approval request after 24 hours, the system will cancel the itinerary.



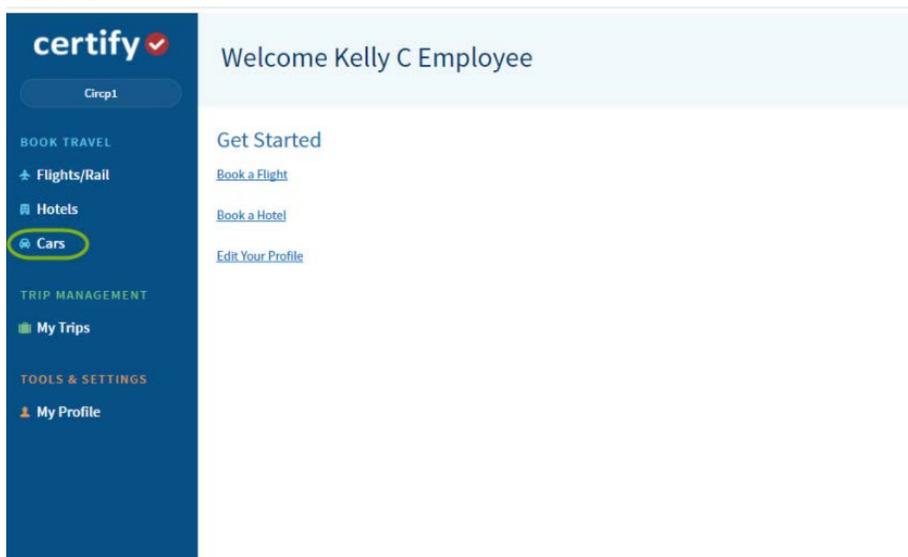
### Car Rentals

CSU Channel Islands preferred Car Rental Company is Enterprise Rent-a-Car or National.

On your Certify account homepage, select **Travel**, and then select **Search & Book Travel**



On the left panel, click **Cars**.



Certify will ONLY allow travelers to book car rentals they are picking up or dropping off at airport locations. All other Enterprise Rent-a-Car reservations will need to be booked via the Enterprise website (see [Enterprise Rent-a-Car Guidelines](#)).

If you are picking up and dropping off the car at the same airport, click **Same Location**. If you plan to leave from a different airport, click **Different Location**. Enter the date range, the time, and choose Enterprise or National as the preferred vendor.

Click **Search**

### Car Search

Traveler Name Cruz Bautista, Karina

Same Location
Different Location

**Pick Up Airport**

✈ Los Angeles Intl. Airport (LAX), Los Angele

**Drop Off Airport**

✈ Sacramento Intl. Airport (SMF), Sacrame

**When**

📅 05/26/2017
9:00 am

📅 05/28/2017
9:00 am

MAY 2017						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

JUNE 2017						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

JULY 2017						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Vendors
Enterprise

Search

Select a rental car form the listed results. Filter the results by Car Type or Car Vendor.

### Rental Car Options

Pick Up on May 26 at 9:00 am      Drop Off on May 28 at 9:00 am

**Car Type**

All Car Types

Full

Midsize

Standard

Economy

Compact

Standard SUV

Convertible

Premium

Minivan

Luxury

**Car Vendors**

All Vendors

Preferred Vendors

Alamo

Thrifty

Dollar

Enterprise

Hertz

Avis

National

Budget

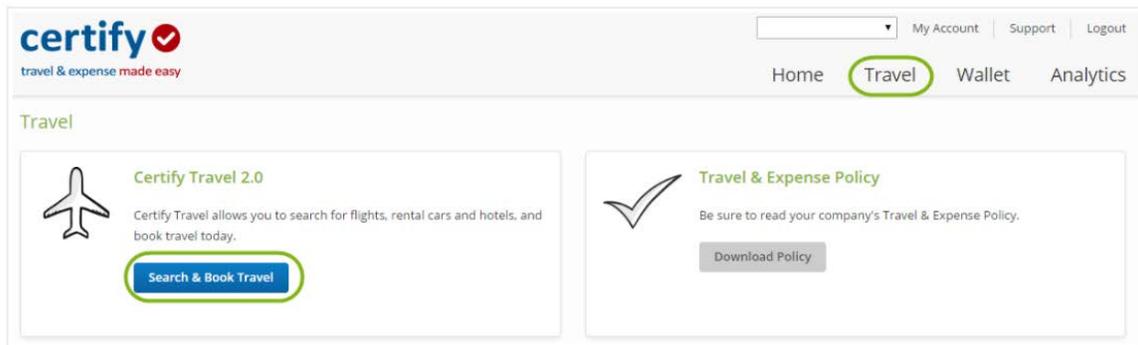
	<b>Full</b> – Ford Fusion (or similar)	Terminal	A/C	Automatic	Unlimited Miles	\$52/day total price: \$142*
	<b>Midsize</b> – Toyota Corolla (or similar)	Terminal	A/C	Automatic	Unlimited Miles	\$52/day total price: \$142*
	<b>Standard</b> – Chrysler 200 (or similar)	Terminal	A/C	Automatic	Unlimited Miles	\$52/day total price: \$142*
	<b>Economy</b> – Chevy Spark (or similar)	Terminal	A/C	Automatic	Unlimited Miles	\$52/day total price: \$142*
	<b>Compact</b> – Nissan Versa (or similar)	Terminal	A/C	Automatic	Unlimited Miles	\$53/day total price: \$144*
		Terminal	A/C	Automatic	Unlimited Miles	\$67/day total price: \$198*

Confirm the details of your selection. The **Policy Status** will alert you if you are out of policy. Click **Continue**.

When your approver approves the reservation, you will receive an email confirmation.

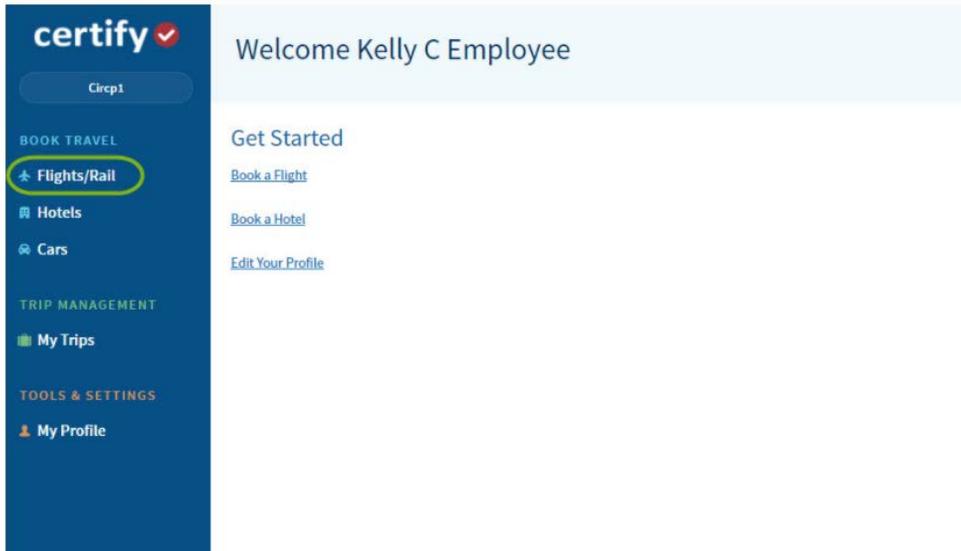
### Rail Reservations

On your Certify homepage, select **Travel**, and then select **Search & Book Travel**.



The screenshot shows the Certify website interface. At the top, there is a navigation bar with 'Home', 'Travel' (circled in green), 'Wallet', and 'Analytics'. Below the navigation bar, there are two main content cards under the 'Travel' heading. The first card, 'Certify Travel 2.0', features an airplane icon and a 'Search & Book Travel' button (circled in green). The second card, 'Travel & Expense Policy', features a checkmark icon and a 'Download Policy' button.

On the left panel, click **Flights/Rail**



Enter a city, town, or station in the **From** and **To** fields, along with the departure and return dates. Using the Airline dropdown menu, select **Amtrak**.

### Flight Search

Round trip
One-way
Multi-city
Easy Search beta

**FROM**

**TO**

**Airports in New York, NY**

Lagaardia  Kennedy  Newark

**WHEN**  Anytime ▾ **TO**  Anytime ▾

September 2016						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

October 2016						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

November 2016						
S	M	T	W	T	F	S
						1
						2
						3
						4
						5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

**ADULTS**  Seniors 65 or over? **CABIN** Economy ▾

**OPTIONS** Amtrak ▾ Stops OK ▾ Refundable Fares Only ▾

Search Flights

Choose a train from the search results.

**Choose an Airline and a Departure Flight**  
New York to Boston - Sun September 25, 2016

Modify Search NYC → BOS Sep 25 BOS → NYC Sep 29 Purchase

Non-Stop  
**\$98**

Non-Stop  
**\$98**

Non-Stop  
**\$695**

Non-Stop  
**\$885**

Non-Stop  
**\$1097**

Non-Stop  
**\$1433**

**LEG 1 New York to Boston on September 25 - Choose your flight**

Filter Results: Stops Airports Departure Times Display

Price	Quality	Route	Departs	Arrives	Stops	Duration	Bags	Info
From: <b>\$98</b> Select	Amtrak 2V66	NYP → BBY	2:40 am	7:53 am	Non-stop	5h 13m	1st: FREE 2nd: FREE	Seat Map
From: <b>\$98</b> Select	Amtrak 2V66	NYP → BOS	2:40 am	7:58 am	Non-stop	5h 18m	1st: FREE 2nd: FREE	Seat Map
From: <b>\$98</b> Select	Amtrak 2V15D	NYP → BBY	7:00 am	11:13 am	Non-stop	4h 13m	1st: FREE 2nd: FREE	Seat Map

Confirm the details of your selection. The **Policy Status** will alert you if you are out of policy. Click **Continue**.

**Flights Review** Business Personal

**Trip Details**

**Newark/Penn Station, NJ → Boston/South Station, MA** Tue, Aug 1, 2017

	Amtrak #190 Train Economy	From: Newark/Penn Station, NJ (nwk)	6:22am
		To: Boston/South Station, MA (bos)	11:05am

**Boston/Back Bay Station, MA → New York/Penn Station, NY** Sat, Aug 5, 2017

	Amtrak #195 Train Economy	From: Boston/Back Bay Station, MA (bby)	6:45am
		To: New York/Penn Station, NY (nyp)	10:50am

**Price Details**

	Base Fare	Taxes & Fees	Total
Adult Traveler	\$98.00	\$0.00	\$98.00
<b>TOTAL</b>			<b>\$98.00</b>

[Change Number or Type of Travelers?](#)

\*All Fares exclusive of [baggage fees](#) and in U.S. dollars.

**Policy Status**

This booking is in policy.

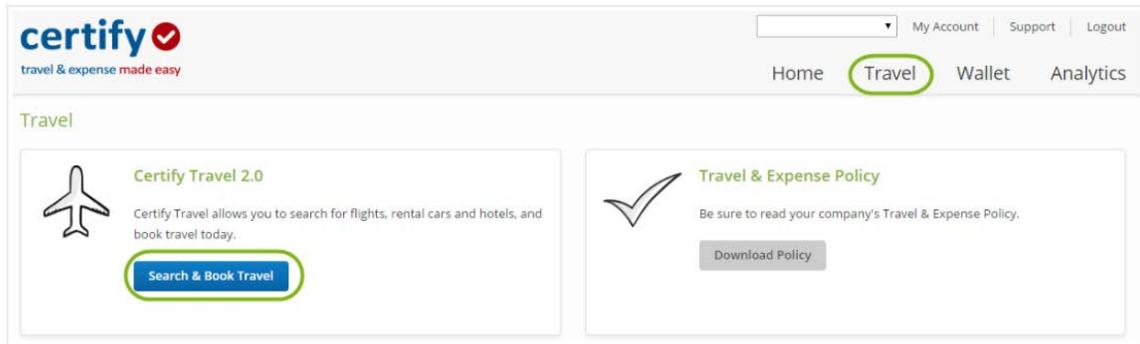
Please double-check your itinerary details before proceeding.

**Continue** >

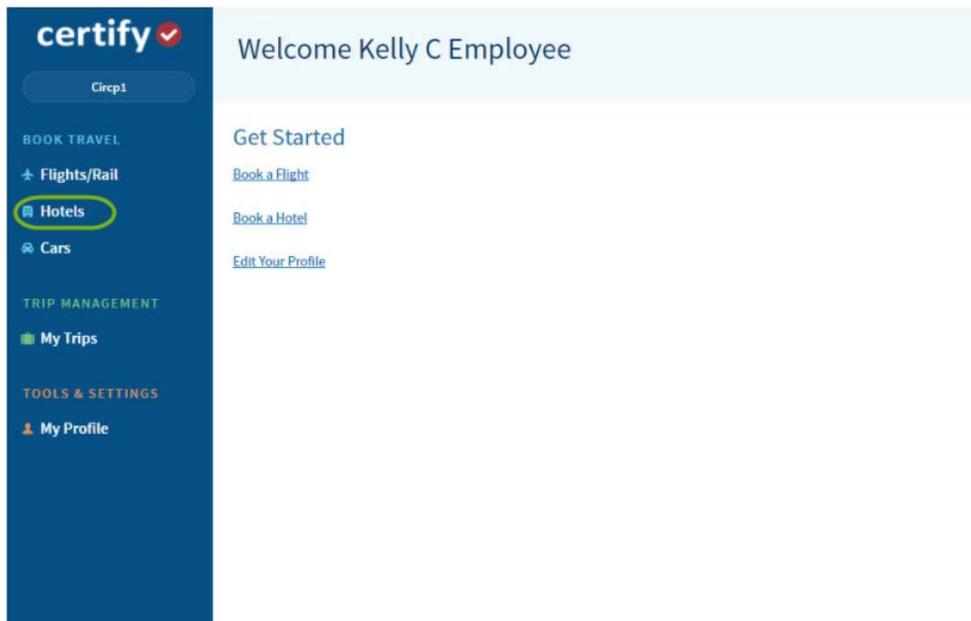
Click **Continue** to complete the reservation.

## Hotel Reservations

On your homepage, select **Travel**, and then select **Search & Book Travel**.



On the left panel, select Hotels.



Enter a city, address, or airport in the location fields provided. Enter a check in and check out date, and then select the number of rooms, number of adults, number of children, and hotel class from the dropdown menus, and then click **Search**.

Going to

When  
  5 nights

APRIL 2015

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

MAY 2015

S	M	T	W	T	F	S
						1 2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

JUNE 2015

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

1 room | 1 Adult | No children

Hotel Class:  Name Contains:

Preferred Properties Only  
 Include AAA Rates

[Search Hotels](#)

Select a hotel from the search results. Filter by preferred hotel, price per room, hotel name, hotel class, and amenities.

Sunday May 10 - Friday May 15

Page 1 of 8 376 hotels found sorted by Best

**Preferred Hotels**

Preferred only

**Price per room**

- under \$118 (27)
- \$118 to \$139 (26)
- \$139 to \$171 (28)
- \$171 to \$208 (27)
- over \$208 (23)

**Hotel Name**

[Go](#)

**Hotel Class**

- ★★★★★ (5)
- ★★★★☆ (42)
- ★★★☆☆ (128)
- ★★☆☆☆ (154)
- ★☆☆☆☆ (11)

**Amenities**

- Child Care (33)
- Internet (272)
- Fitness Center (187)
- Pet Friendly (159)
- Pool (250)
- Restaurant (134)

	<b>Courtyard by Marriott San Diego Downtown...</b> 530 Broadway, San Diego CA Downtown - San Diego Intl Airport (SAN)	per night from <b>\$199</b>
	<b>Paradise Point Resort &amp; Spa</b> 1404 Vacation Rd, San Diego CA Beach Cities	per night from <b>\$152</b>
	<b>Best Western Plus Island Palms Hotel &amp; Ma...</b> 2022 Shelter Island Dr, San Diego CA Beach Cities	per night from <b>\$152</b>
	<b>Manchester Grand Hyatt San Diego</b> 1 Market Pl, San Diego CA Downtown - San Diego Intl Airport (SAN)	per night from <b>\$251</b>
	<b>Town and Country Resort &amp; Convention Ce...</b> 500 Hotel Cir N, San Diego CA Mission Valley - Old Town	per night from <b>\$120</b>
	<b>Omni San Diego Hotel</b> 875 L St, San Diego CA Downtown - San Diego Intl Airport (SAN)	per night from <b>\$260</b>
	<b>Hotel Indigo Gaslamp Quarter</b> 509 9th Ave, San Diego CA Downtown - San Diego Intl Airport (SAN)	per night from <b>\$123</b>

Select the Room Type and click Book.  
 Confirm the details of your selection. The Policy Status will alert you if your booking is out of policy.

\*Per the CSUCI Travel Policy the in state and out-of-state per night lodging rate is \$275 per night before taxes or fees. Expenditures over the allowable limit are the responsibility of the traveler unless they receive a pre-approved documented exception from the University Controller.\*

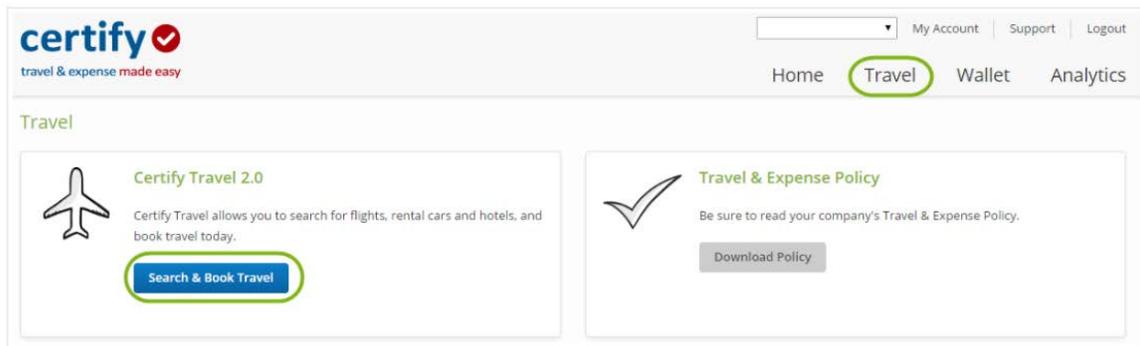
Enter **payment** information. Hotel reservations for business travel are reimbursable to the traveler after the trip.

Click **Book Now** to complete the reservation.

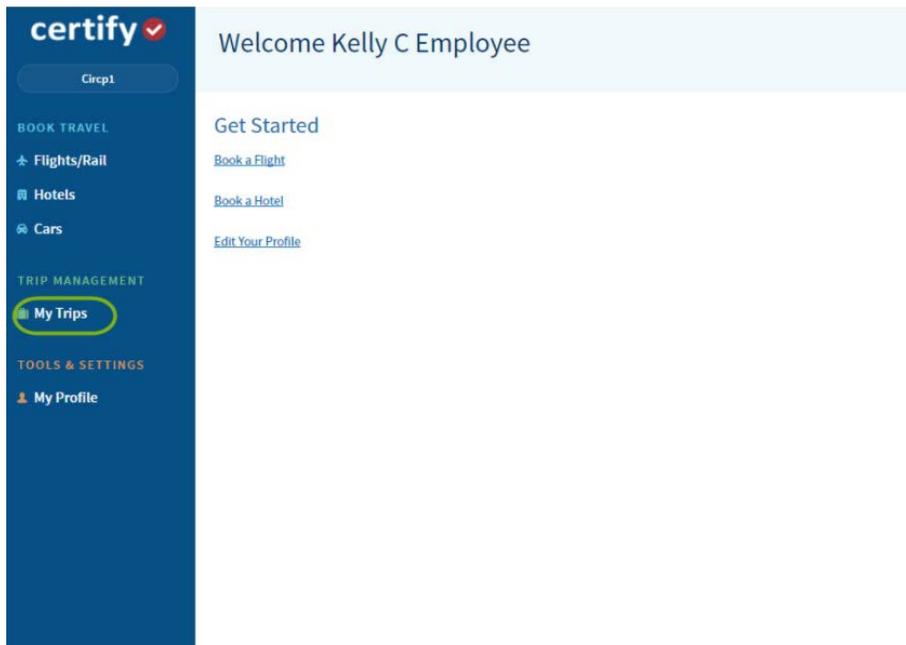
## Canceling an Itinerary

Travelers must make any necessary changes or cancelations to any booked itinerary within 24 hours of initial purchase. Itineraries canceled 24 hours after initial booking may incur cancellation fees.

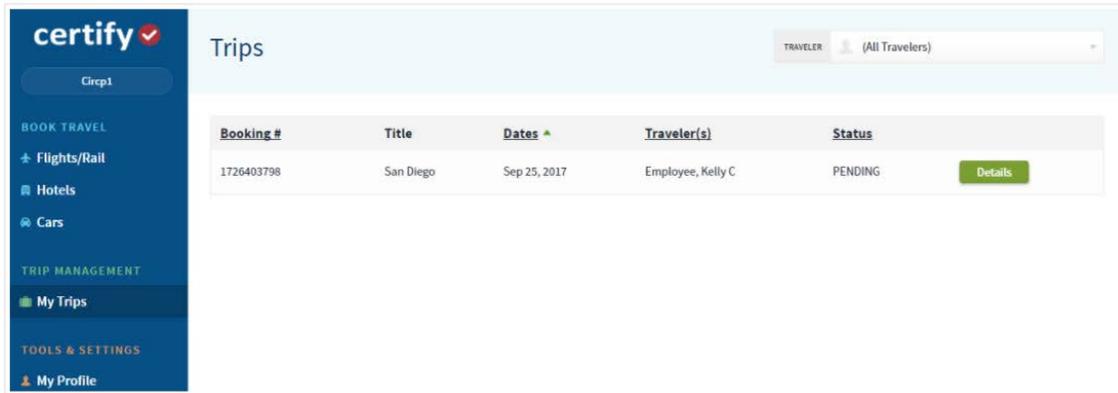
On your homepage, select **Travel**, and then select **Search & Book Travel**.



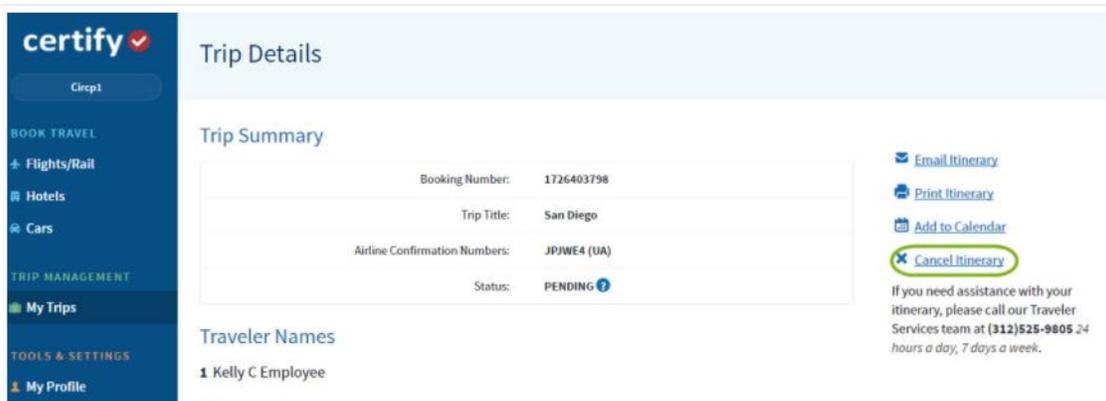
On the left panel, select **My Trips**.



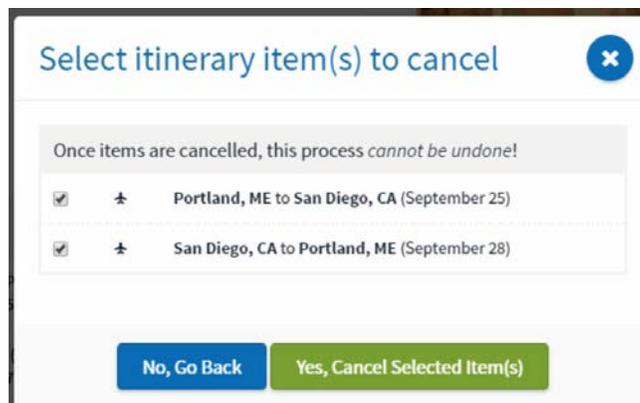
Locate the itinerary and select Details.



In the **Trip Summary** section, select **Cancel Itinerary**.



Confirm the portion of the itinerary you would like to cancel and select, Yes, Cancel Selected Item(s).



## Employment Separation

In the event that an employee separates from the campus their Certify account will be closed. Managers are responsible for cancelling any pending travel for that employee. The department may incur additional fees if canceling reservations or making changes to reservations of an employee that is separating from employment.

## Glossary

**Certify Wallet:** Cloud-based wallet where all captured receipts are stored before user can add them to an expense report.

**AmTrav:** CSUCI's new travel agency

**Delegate User:** Person designated to book travel on behalf of others.