Certify: Quick Reference Training Guide for Approvers
For general training, please see the Certify Help Center.

CSUEB Travel Website: www.csueastbay.edu/travel

Approver's Checklist:

Ensure the following are included in the Expense Report:

- Conference agenda (if applicable).
- All prepaid expenses (registration, airfare, etc.)
- Mode of transportation (air, auto, public, etc.)
- Lodging (if applicable).
- Receipts for travel expenses over $75 are included.
- Included receipts and supporting documentation are legible.

- Bookings for airfare and rental cars completed thru the Certify system, Global Travel or Enterprise must show a credit card number in transaction “details”.
- Expense Report Reimbursement Requests are submitted by the Traveler for approval within 30 days of the end a trip.
- If your staff goes over the $275 (before taxes and fees) hotel lodging rate, please make sure that proper supporting documentation, an explanation and Division Vice President approval is included with their expense claim.
- Expense Report was checked for any warning flags; a typical travel reimbursement will not have any.
- Please be familiar with the travel and hospitality policies as well as any other related policy.

Approve an expense report in 3 quick steps:

1. After opening the expense report, select Approve to approve a single expense or Approve All to approve all expenses within the report.

2. After approving the expense report, YOU MUST click Submit for Reimbursement button.

3. After submitting the expense report, scroll down past the preview message and click SUBMIT to send to Accounts Payable.

Area of responsibility:

Approvers must ensure that all expenses are reasonable in terms of price, purpose, and necessity; along with validating the appropriate fund being used for the expense, and ensuring that all expenses being requested are ordinary, reasonable, not extravagant, and supported by a business purpose or justification, as appropriate.