

## Certify: Quick Reference Training Guide for Approvers

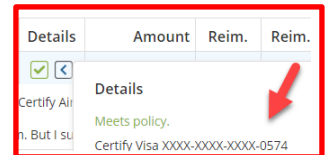
For general training, please see the [Certify Help Center](#).

**CSUEB Travel Website:** [www.csueastbay.edu/travel](http://www.csueastbay.edu/travel)

### Approver's Checklist:

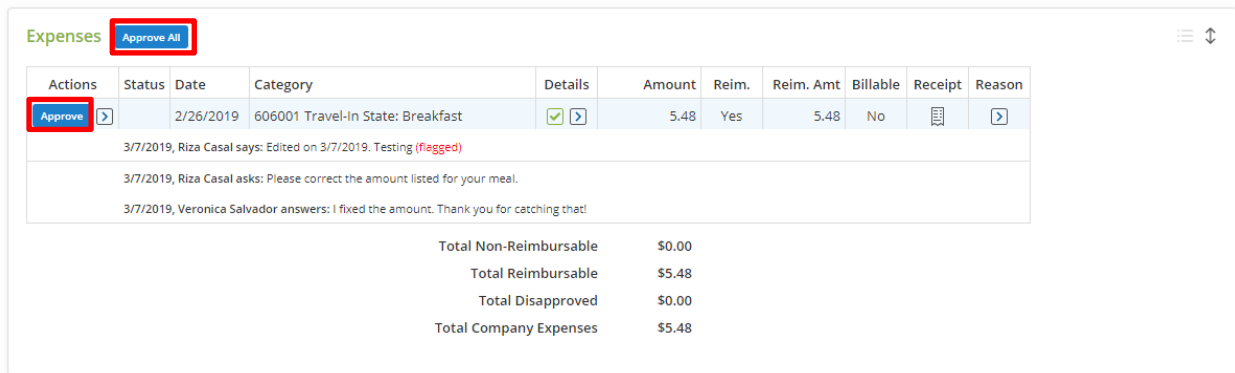
Ensure the following are **included** in the Expense Report:

- 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.



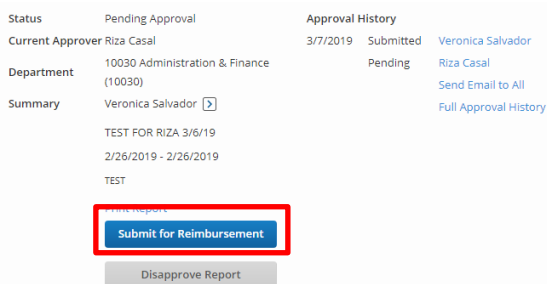
### Approve an expense report in 3 quick steps:

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



Actions	Status	Date	Category	Details	Amount	Reim.	Reim. Amt	Billable	Receipt	Reason
<b>Approve</b>		2/26/2019	606001 Travel-In State: Breakfast	<input checked="" type="checkbox"/>	5.48	Yes	5.48	No		
3/7/2019, Riza Casal says: Edited on 3/7/2019. Testing (flagged)										
3/7/2019, Riza Casal asks: Please correct the amount listed for your meal.										
3/7/2019, Veronica Salvador answers: I fixed the amount. Thank you for catching that!										
Total Non-Reimbursable					\$0.00					
Total Reimbursable					\$5.48					
Total Disapproved					\$0.00					
Total Company Expenses					\$5.48					

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



Status: Pending Approval

Current Approver: Riza Casal

Department: 10030 Administration & Finance (10030)

Summary: Veronica Salvador

TEST FOR RIZA 3/6/19

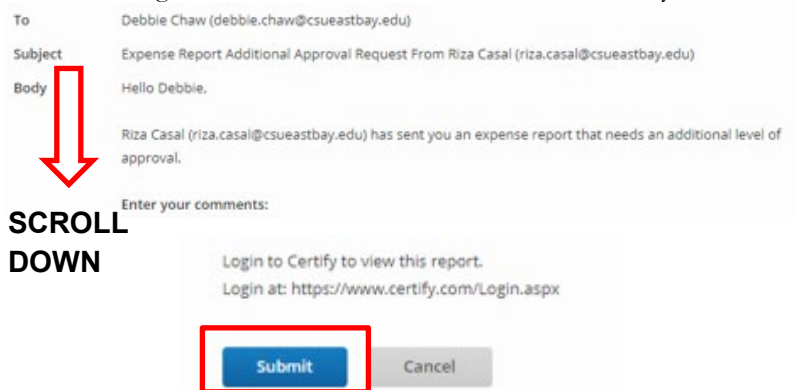
2/26/2019 - 2/26/2019

TEST

**Submit for Reimbursement**

Disapprove Report

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



To: Debbie Chaw (debbie.chaw@csueastbay.edu)

Subject: Expense Report Additional Approval Request From Riza Casal (riza.casal@csueastbay.edu)

Body: Hello Debbie.

Riza Casal (riza.casal@csueastbay.edu) has sent you an expense report that needs an additional level of approval.

Enter your comments:

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

**Submit** Cancel

### 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.