

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

Login to Certify: <https://travel.csueastbay.edu>

To book travel (flights/rail, hotels, cars):

- Click on **Travel** located at the top right of the screen.
- Then, click on the **Search & Book Travel** button.
 - A new browser tab will open.
- Select the type of booking feature.
- To exit the travel booking feature and return to the Certify page, simply exit the browser tab.


Please be entirely certain that the information regarding your itinerary



when booking is correct. By submitting to book with Certify, your booking reservation(s) will be confirmed and made.



To create a Travel Expense Report:

- From your Certify page, click on **New Expense Report**.
- Select action item.
- Enter expense report header information and click **Next**.

Your **Expense Report Name** should contain relevant information regarding your trip (i.e. name of conference, location, and date).  Please do NOT include COMMAS in the report name, as this could cause file import errors.

| | |
|---------------------|--|
| Expense Report Name | Certify Training 06/05-06/07/2019 |
| Billable to Client | <input type="checkbox"/> |
| Start Date | 6/5/2019  |
| End Date | 6/7/2019  |
| Description | Attended Certify training in San Diego, CA to learn more about being a Certify System Admin. |


Your **Description** should consist of your Business Purpose/Remarks.



Fill in the **Add Expense** area on your **Expense Report** page.

- If you already have receipts pertinent to your trip in your Certify Wallet, you can add them to your travel expense report simply by clicking **Add** next to the related receipt in the **My Certify Wallet** section.

Review/edit your expense's receipt(s) details by clicking on  .

Helpful Hints:

- When adding expense details, please be sure to have the Department Field **match** with the correct Department included in the Fund field. For example: **Department:** 13700 Finance **Fund:** EB001 | 13700 Finance.
- Be sure any Campus-paid travel transactions are matched with receipt (e.g. airfare and rental cars). Campus-paid transactions **must be cleared from your wallet** after each business trip. Look for credit card icon under “source”.
- Ensure you do not have any warnings  as these may indicate a policy non-compliance. If an explanation is needed, use the reason box or attach additional documentation as needed. Note that not all non-compliances will result in a warning. Be sure to familiarize yourself with CSUEB Travel and Hospitality Policies.
- To submit your expense for approval, click the **Submit for Approval** button located in the upper right hand corner.


| Source | Receipt | Date | Category/Details | Vendor |
|---|---|-----------|-----------------------------|-----------------------|
|  |  | 4/10/2019 | > 606001 Travel-In State... | Enterprise Rent-A-Car |



*For each travel expense, please be sure to **type “yes”** for each travel expense, certifying you received authorization to travel; traveled on official business; actually spent the amount for listed expenses; verified the amount due is accurate; and, will not seek reimbursement for (1) duplicate claim or (2) from any other source.*

*Please keep in mind that any exceptions to the travel policy must be **approved by your Division’s Vice President***

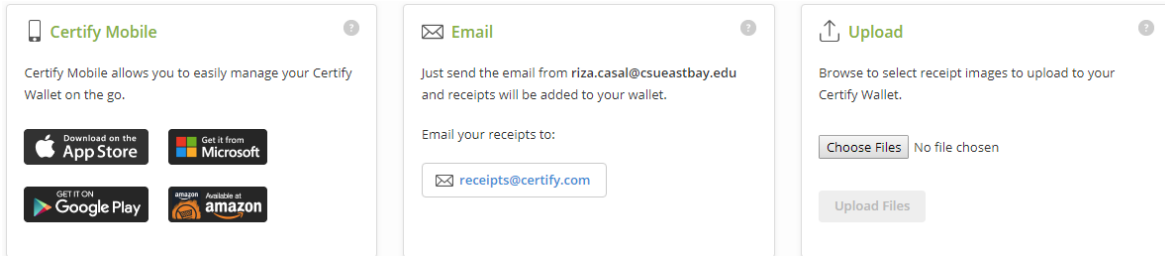
*For instructions on uploading an addition attachment and adding your Division’s Vice President’s, please see the **Creating and Submitting Expense Reimbursement** guide on the travel website: www.csueastbay.edu/travel.*

Pre-trip Authorization? YES 

To add receipts to your Certify Wallet:

If a receipt is required, you can add it to your Certify account by uploading it into your Certify Wallet using one of the following methods:

- **Mobile:** Download the Certify mobile app on your mobile device.
- **Email:** Email your receipt(s) to receipts@certify.com
- **Upload:** Upload a picture or pdf file of your receipt(s) by using your Certify account online.



The image shows three panels illustrating how to add receipts to a Certify Wallet:

- Certify Mobile:** A panel showing the Certify Mobile app interface with instructions to download it from the App Store, Microsoft, Google Play, or Amazon.
- Email:** A panel with an envelope icon and the text: "Just send the email from riza.casal@csueastbay.edu and receipts will be added to your wallet." Below this, it says "Email your receipts to:" followed by an email input field containing "receipts@certify.com".
- Upload:** A panel with an upload icon and the text: "Browse to select receipt images to upload to your Certify Wallet." Below this, there is a "Choose Files" button (with "No file chosen" text next to it) and an "Upload Files" button.

Helpful Hints:

- Take care to upload receipts only once; duplicate receipt uploads should always be deleted following submission of a trip reimbursement. Wallet should only contain valid pending receipt transactions.
- For travel, receipts are not required for purchases \$75.00 and under. Receipts are required for hospitality and other reimbursements that are not travel related.
- Receipts must be scanned individually per page and must be legible. *Illegible receipts and documentation may cause a delay with processing your request.*
- Please upload **JPEG or PDF** files. Unfortunately, Word Doc files are not supported file types.
- For some expenses, such as hospitality expenses, you will see the following attendee prompt. For reporting consistency, please complete these fields as indicated below.
 - **Title:** Employee, Student, Prospective Student, or Guest
 - **Company:** CSUEB (or as preferred by department)
 - **Relationship:** Other

Attendees

| | | |
|-------|---------|---|
| First | Last | Other |
| Title | Company | <input type="button" value="Add"/> <input type="button" value="Find"/> <input type="button" value="Clear"/> |

Feel free to monitor your reimbursement's progress:



The image shows a "My Expense Reports" dashboard with a blue "New Expense Report" button and a list of report statuses with their respective counts:

- Drafts: 1
- Pending Approval: 0
- Pending Payment: 0
- Archived: 0

Certify Support:

You may call the 24-hr live support (Monday-Friday) at: 888-925-0510 Option 2

In case a **Support Code** is needed when contacting Certify Support, please log in to your Certify account and then click on the **Support Link** in the upper right corner.

Still Need Help? Certify has a support site with answers to common questions and a support team who can help you with any issues you may have. Login to Certify. Then, click the **Support** link in the upper right hand corner.

- Use the **Browse Help Center** for researching Certify related issues.
- Submit a **Support Ticket** in order to get assistance from the Certify support team.
- There is also a **Certify Training Camp** that is available for those who would like to learn the basics of Certify.