



Certify User Guide

APPROVING EXPENSE REPORTS



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This version is current as of April 1, 2021

For continuously updated instructions, please visit our Help Center within the Certify Support tab.

Certify is T&E expense management made easy

With thousands of users and satisfied customers worldwide, Certify is the leading fully automated travel and entertainment expense management solution for companies of every size. The easy-to-use Certify cloud-based interface and mobile application with electronic receipt capture allow organizations to book travel and complete expense reports and reimbursement quickly, easily, and cost-effectively. All while reducing overhead processing costs, increasing compliance with corporate policy and simplifying the overall T&E management process for employees, accountants and administrators.

Please Note: *As a SaaS-based software, Certify offers several additional services and configuration options that companies may choose, or choose not to, use. Please refer to our online Help Center for even more how-to articles about extra processes and features.*

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APPROVING EXPENSE REPORTS

A **Certify Approver** is defined as a user who has expense reports sent to them for review and approval.

Approvers can:

- Approve and then the report forwards to Accounting
- Disapprove the report and send back to the Employee

The guide will review how to:

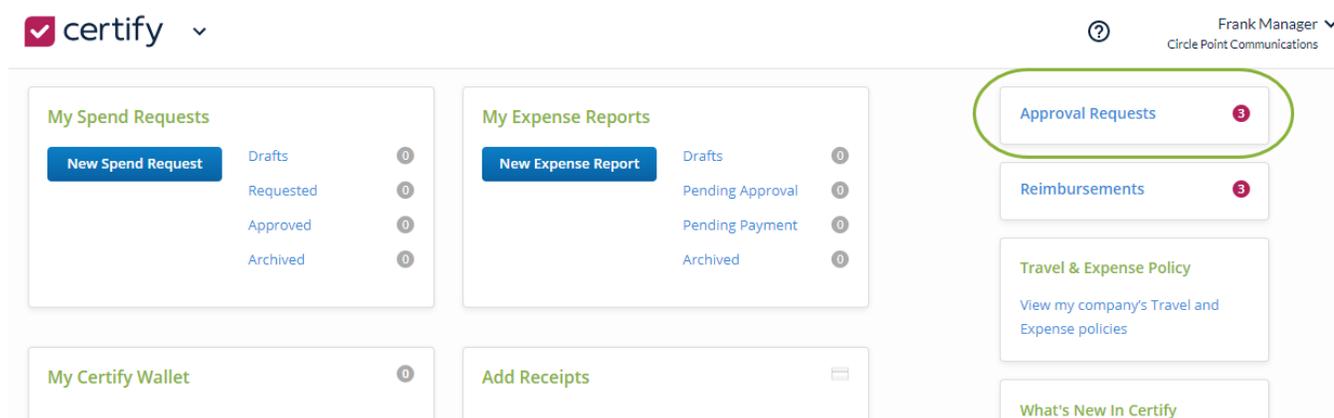
- Use all review tools
- Send an inquiry back to an employee
 - Approve a report
 - Disapprove a report
- Perform approval tasks using Certify Mobile

Approver's Review Tools

Other Actions Menu – Approvers

When you are reviewing an expense report, there are several actions you can take under the **Other Actions** menu. This article shows you how to use the actions available in the **Other Actions** menu.

Step 1: On your **Certify** homepage, click **Approval Requests**.



Step 2: On the next page, you will see all the expense reports awaiting your approval. To view a specific expense report, click the **Employee** name or the view (document) icon under the **View** column. This will open the expense report in a new browser window.

My Approval Requests

The following expense reports have been sent to you for approval.

View	Policy	Status	Employee	Submit Date	Start Date	End Date	Expense Report	Total
		Pending	Meredith Employee	10/31/2016	9/1/2016	9/15/2016	ReportExecutive - 9/1/2016 - 9/15/2016	\$410.73
Total								\$410.73

Step 3: There are several actions available in the **Other Actions** menu. To access this menu, click the arrow (>) under the **Approval** column. Actions in the **Other Actions** menu include:

- **Add Note** - Add a note to a specific expense line
- **Inquire** - Ask the submitter a question about an expense and/or allow the submitter to edit the expense
- **Add Bank Fee** - Add a bank fee for any currency conversion charges
- **Split Expense** - Split a portion of an expense into a different category or department
- **Disapprove** - Disapprove the expense line

To access an action in the **Other Actions** menu, select the action name. Complete the fields under that action as needed and save.

Approver's Review Tools

Companies can also configure their settings and allow approvers to edit an expense line. Depending on your company's configuration, you may already see these actions available in the **Other Actions** menu:

- **Edit Expense** – Edit any of the expense details in an expense line
- **Edit Reim. Amount** - Edit the reimbursable amount of an expense line

Expenses Approve All

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve >		10/1/2016	Mileage	<input checked="" type="checkbox"/> >	119.84	Yes	119.84	No		>
Approve <				<input checked="" type="checkbox"/> >	191.96	Yes	191.96	No		>
Approve >				<input checked="" type="checkbox"/> >	5.82	Yes	5.82	No		>
Approve >				<input checked="" type="checkbox"/> >	93.11	Yes	93.11	No		>
Other Actions ×										
Add Note					Edit Expense					
Inquire					Edit Reim. Amount					
Split Expense					Add Bank Fee					
Disapprove										
Total Non-Reimbursable					\$0.00					
Total Personal					\$0.00					
Total Reimbursable					\$410.73					
Total Disapproved					\$0.00					
Total Company Expenses					\$410.73					

Sending and Receiving an Inquiry – Approvers

As a manager reviewing a submitted expense report, you can send an inquiry to the submitter to request specific information such as a new or different receipt, or request an edit to an expense line. This method allows the submitter to make corrections to expense lines without you having to disapprove the entire expense report. This article shows you how to send an **Inquiry** on a expense line, as well as how to view the submitter's reply.

Creating an Inquiry

Step 1: On your account homepage, select **Approval Requests**.

The screenshot shows the Certify account homepage. At the top left is the 'certify' logo. At the top right is the user name 'Frank Manager' and the company name 'Circle Point Communications'. The main content area is divided into several sections: 'My Spend Requests' with a 'New Spend Request' button and links for Drafts, Requested, Approved, and Archived; 'My Expense Reports' with a 'New Expense Report' button and links for Drafts, Pending Approval, Pending Payment, and Archived; 'My Certify Wallet'; 'Add Receipts'; 'Approval Requests' (circled in green) with a red notification badge showing '3'; 'Reimbursements' with a red notification badge showing '3'; 'Travel & Expense Policy' with a link to 'View my company's Travel and Expense policies'; and 'What's New In Certify'.

Step 2: On the next page, you will see all expense reports awaiting your approval. To view a specific expense report, click the **Employee** name or the view (document) icon under the **View** column. This will open the expense report in a new browser window.

Approver's Review Tools

My Approval Requests

The following expense reports have been sent to you for approval.

View	Policy	Status	Employee	Submit Date	Start Date	End Date	Expense Report	Total
		Pending	Kelly Employee	10/27/2016	9/21/2016	9/27/2016	Expenses - 9/21/2016 - 9/27/2016	\$709.55
		Pending	Meredith Employee	10/31/2016	9/1/2016	9/15/2016	ReportExecutive - 9/1/2016 - 9/15/2016	\$413.48
Total								\$1,123.03

Step 3: If you have a question about an expense line, or about the expense report, you will need to open the **Other Actions** menu. To access this menu, click the arrows (>) under the **Approval** column. Select **Inquire**.

Expenses Approve All

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve >		10/1/2016	Mileage	>	119.84	Yes	119.84	No		>
Approve >		10/3/2016	Lodging	>	191.96	Yes	191.96	No		>
Approve >		10/3/2016	Coffee, Tea, Snacks	>	5.82	Yes	5.82	No		>
Approve >		10/4/2016	Meals - Large Group	>	93.11	Yes	93.11	No		>
Approve >				>	2.75	Yes	2.75	No		>

Other Actions

- Add Note
- Inquire
- Split Expense
- Disapprove
- Edit Expense
- Edit Reim. Amount
- Add Bank Fee

Total Non-Reimbursable	\$0.00
Total Personal	\$0.00
Total Reimbursable	\$413.48
Total Disapproved	\$0.00

Step 4: On the next page, enter text in the **Enter Question** field. If you would like to allow the submitter to make edits to the expense line, click the checkbox next to **Allow Expense Edit**. Click **Save**.

Ask a Question About an Expense

Your question will be sent to Meredith Employee. The question and answer will be saved with this expense.

Enter Question

Allow Expense Edit

Step 5: After saving your **Inquiry**, the expense report status will change from **Pending** to **Inquiry** to indicate that the expense report has been sent back to the submitter.

Approving/Disapproving Reports

My Approval Requests

The following expense reports have been sent to you for approval.

View	Policy	Status	Employee	Submit Date	Start Date	End Date	Expense Report	Total
		Pending	Kelly Employee	10/27/2016	9/21/2016	9/27/2016	Expenses - 9/21/2016 - 9/27/2016	\$709.55
		Inquiry	Meredith Employee	10/31/2016	9/1/2016	9/15/2016	ReportExecutive - 9/1/2016 - 9/15/2016	\$413.48
Total								\$1,123.03

Viewing the Inquiry Reply

When the submitter responds to your inquiry, you can view their response in the expense line. Your original inquiry and the submitter's reply are both saved in the expense line within the expense report. When you have finished reviewing the submitter's response, you can continue moving forward with the expense report approval process.

Expenses Approve All

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve		10/1/2016	Mileage		119.84	Yes	119.84	No		
Approve		10/3/2016	Lodging		191.96	Yes	191.96	No		
Approve		10/3/2016	Coffee, Tea, Snacks		5.82	Yes	5.82	No		
Approve		10/4/2016	Meals - Large Group		93.11	Yes	93.11	No		
Approve		10/9/2016	Other Transportation		2.75	Yes	2.75	No		

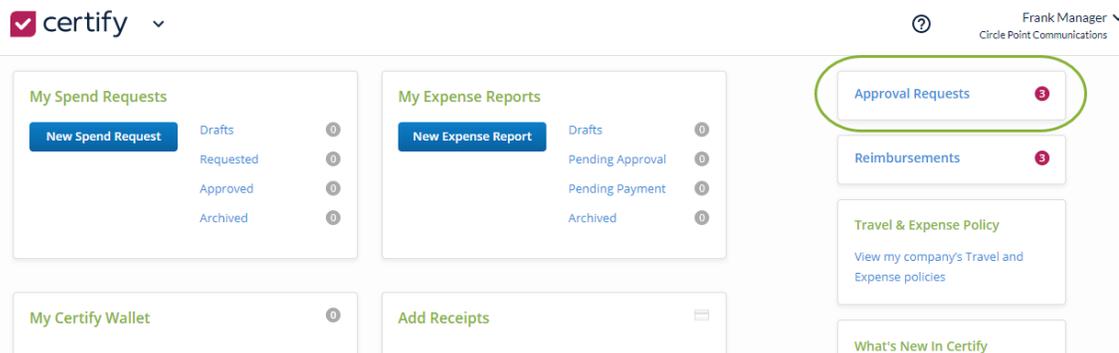
Edit 11/10/2016, Dan Manager asks: This is missing a receipt. Do you have one?
11/10/2016, Meredith Employee answers: Sorry, I do not.

Total Non-Reimbursable \$0.00
Total Personal \$0.00

Approving/Disapproving Reports

When an expense report is submitted for approval, the approver receives an email alerting them that an expense report is awaiting their approval. This article shows you how, as a Manager, to approve expense reports.

Step 1: On your account homepage, select **My Approval Requests**.



Approving/Disapproving Reports

Step 2: On the next page, you will see all expense reports awaiting your approval. To view a specific expense report, select the **Employee** name or the view (document) icon under the **View** column to open the expense report in a new browser window.

My Approval Requests

The following expense reports have been sent to you for approval.

View	Policy	Status	Employee	Submit Date	Start Date	End Date	Expense Report	Total
		Pending	Kelly Employee	10/27/2016	9/21/2016	9/27/2016	Expenses - 9/21/2016 - 9/27/2016	\$709.55
		Pending	Meredith Employee	10/31/2016	9/1/2016	9/15/2016	ReportExecutive - 9/1/2016 - 9/15/2016	\$413.48
Total								\$1,123.03

Step 3: On the next page, you will see options for different detail views. Click the view icon to expand or collapse the expense details.

To view a receipt in an expense line, click the view (document) icon under the **Receipt** column. A red exclamation mark under the **Receipt** column indicates that there is no receipt image attached to the expense line. A green checkmark in the **Receipt** column indicates that there is no receipt image attached to the expense line, however, no receipt is required for this expense according to your company's policies.

To view vendor and location details, click the arrow (>) under the **Details** column. A red exclamation mark under the **Details** column indicates that the expense may be out of company policy.

Approve Expense Report

Status: Pending Approval

Current Approver: Dan Manager

Department: General & Admin (01)

Summary: Meredith Employee

ReportExecutive - 10/1/2016 - 10/15/2016

10/1/2016 - 10/15/2016

Print Report

[Submit for Reimbursement](#)

[Disapprove Report](#)

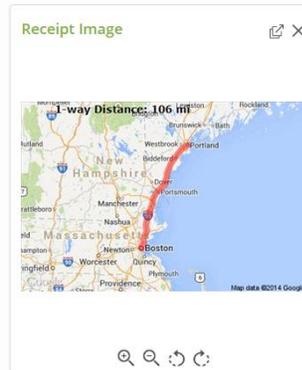
Approval History

11/10/2016 Submitted Meredith Employee

Pending Dan Manager

[Send Email to All](#)

[Full Approval History](#)



Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve		10/1/2016	Mileage		119.84	Yes	119.84	No		
Approve		10/3/2016	Lodging					No		
Approve		10/3/2016	Coffee, Tea, Snacks					No		
Approve		10/4/2016	Méals - Large Group					No		
Total Non-Reimbursable										
Total Personal										
Total Reimbursable										
Total Disapproved					\$0.00					
Total Company Expenses					\$410.73					

Details

Meets policy.

Location: TAMPA Westshore Airport

Hotel Name: Courtyard by Marriott

Check-in: 10/1/2016

Check-out: 10/3/2016

Approving/Disapproving Reports

Step 4: If you have a question about an expense line, or about the expense report, there are several actions available under the **Other Actions** menu. To access this menu, click the arrow (>) under the **Approval** column and select the item name.

Expenses Approve All

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve >		10/1/2016	Mileage	<input checked="" type="checkbox"/> >	119.84	Yes	119.84	No		>
Approve <				<input checked="" type="checkbox"/> >	191.96	Yes	191.96	No		>
Approve >				<input checked="" type="checkbox"/> >	5.82	Yes	5.82	No		>
Approve >				<input checked="" type="checkbox"/> >	93.11	Yes	93.11	No		>
Total Non-Reimbursable					\$0.00					
Total Personal					\$0.00					
Total Reimbursable					\$410.73					
Total Disapproved					\$0.00					
Total Company Expenses					\$410.73					

Other Actions [X]

- Add Note
- Inquire
- Split Expense
- Disapprove
- Edit Expense
- Edit Reim. Amount
- Add Bank Fee

Step 5: To approve the entire expense report, select **Approve All** next to **Expenses**. To approve specific expense lines, click the green checkmark under the **Approval** column for that expense line. After approving, select **Submit for Reimbursement** to send the expense report to the next approver.

Approve Expense Report

Status: Pending Approval

Current Approver: Dan Manager

Department: General & Admin (01)

Summary: Meredith Employee

Report Executive - 10/1/2016 - 10/15/2016

10/1/2016 - 10/15/2016

Print Report

Submit for Reimbursement

Disapprove Report

Receipt Image

Expenses Approve All

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve >		10/1/2016	Mileage	<input checked="" type="checkbox"/> >	119.84	Yes	119.84	No		>
Approve >		10/3/2016	Lodging	<input checked="" type="checkbox"/> >	191.96	Yes	191.96	No		>
Approve >		10/3/2016	Coffee, Tea, Snacks	<input checked="" type="checkbox"/> >	5.82	Yes	5.82	No		>
Approve >		10/4/2016	Meals - Large Group	<input checked="" type="checkbox"/> >	93.11	Yes	93.11	No		>
Total Non-Reimbursable					\$0.00					
Total Personal					\$0.00					
Total Reimbursable					\$410.73					
Total Disapproved					\$0.00					
Total Company Expenses					\$410.73					

Approving/Disapproving Reports

Step 6: By clicking **Submit for Reimbursement**, an email preview will be displayed. Enter text in **the Enter your comments** field as needed for the next approver. Click **Submit** to complete the approval process.

Submit Expense Report for Reimbursement

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 Annie Accountant (aaccountant@circp1.com)
Subject Expense Report Reimbursement Request From Dan Manager (dmanager@circp1.com)
Body Hello Annie,

Dan Manager (dmanager@circp1.com) has sent an expense report for reimbursement.

Enter your comments:

Expense Report Summary

Employee: Meredith Employee (memmployee@circp1.com)
Expense Report Name: ReportExecutive - 9/1/2016 - 9/15/2016
Dates: 9/1/2016 - 9/15/2016

Non Reimbursable Total: \$0.00
Reimbursable Total: \$410.73
Disapproved Total: \$0.00
Total: \$410.73

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

Submit

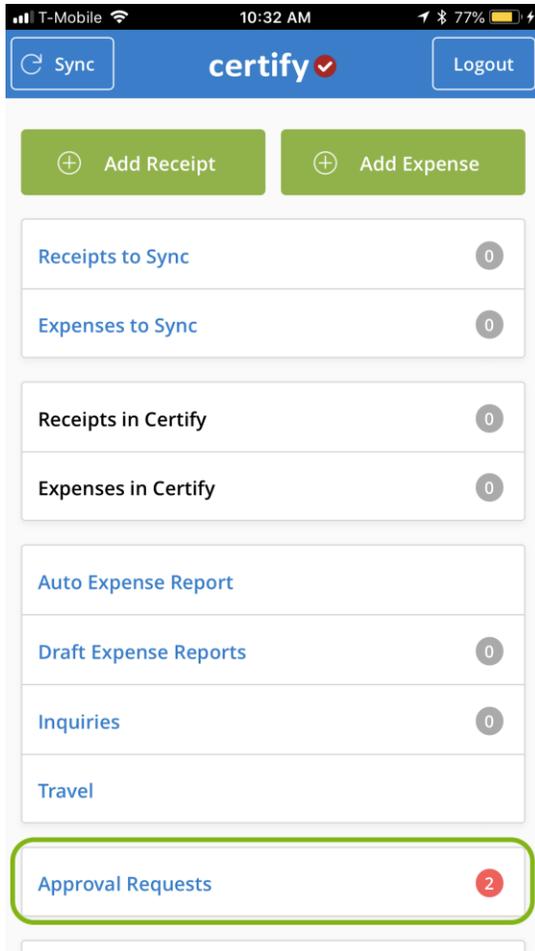
Cancel

Approving on Certify Mobile

Certify allows you to approve and process reports using the Certify Mobile app. This article shows you how to approve or process expense reports using Certify Mobile.

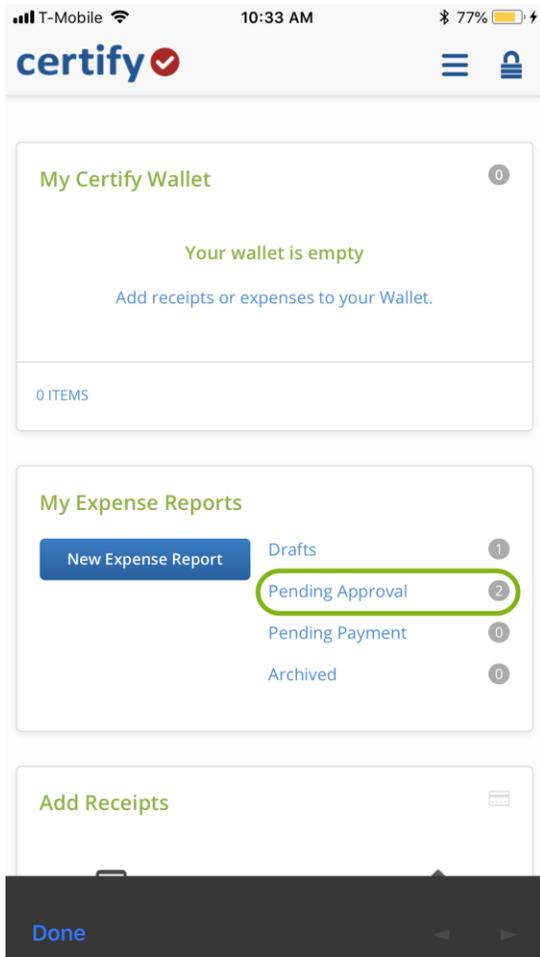
Step 1: On your Certify Mobile app Home screen, tap **Approval Requests**. If the number of approval requests is incorrect, tap **Sync** to update the data.

Approving/Disapproving Reports



Step 2: To view an expense report, tap the view (document) icon under the **View** column next to the expense report you would like to open.

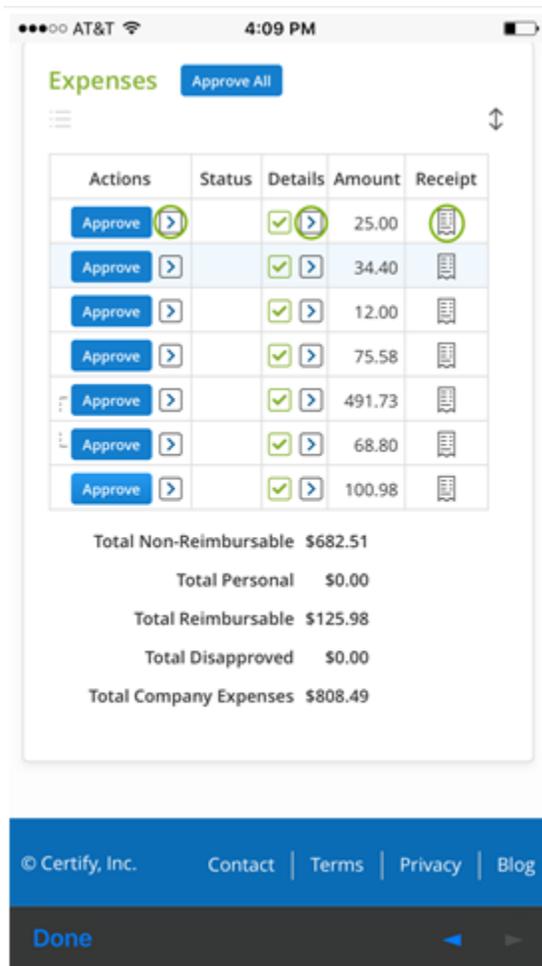
Approving/Disapproving Reports



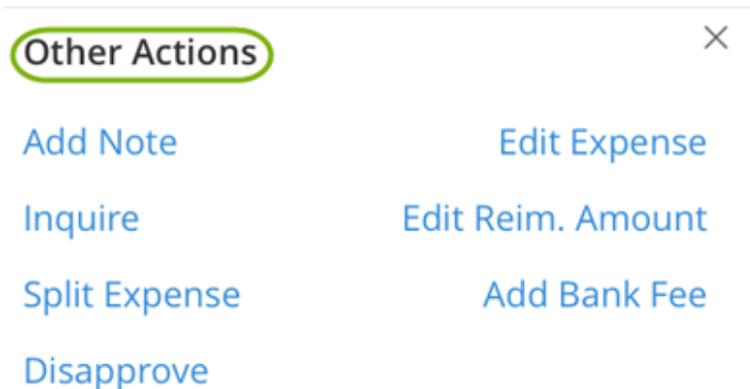
Step 3: To view a specific receipt in an expense line, click the view (document) icon under the **Receipt** column. A red exclamation mark under the **Receipt** column indicates that there is no receipt image attached to the expense line. A green check mark in the **Receipt** column indicates that there is no receipt image attached to the expense line, however, no receipt is required for this expense according to your company's policies.

To view vendor and location details, tap the arrow (>) under the **Details** column. A red exclamation mark under the **Details** column indicates that the expense may be out of company policy.

Approving/Disapproving Reports

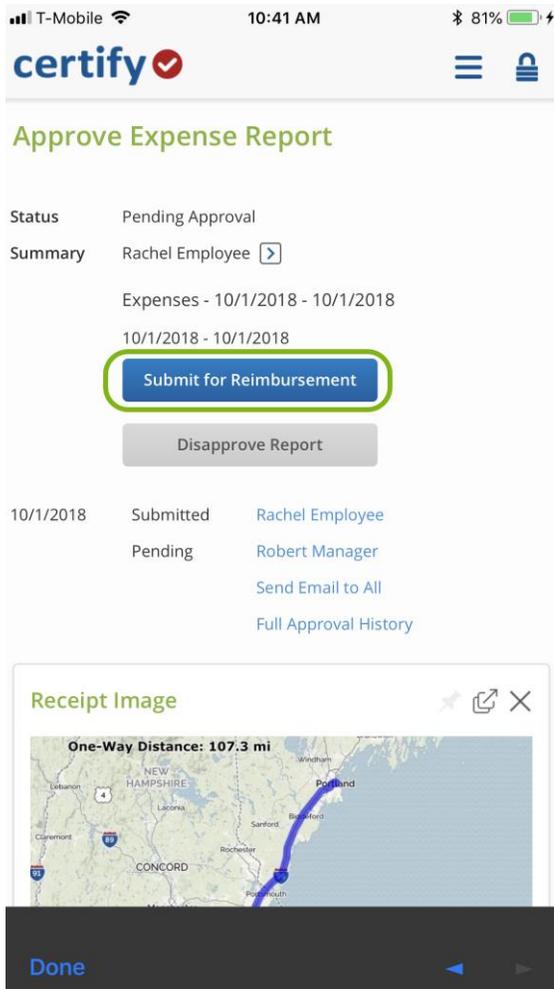


If you have a question about an expense line, or about the expense report, there are several actions available in the Other Actions menu. To access this menu, tap the arrow (➤) under the **Actions** column. In the **Other Actions** menu, select the action name.



Step 4: To approve the entire expense report, tap **Approve All** next to **Expenses**. To approve specific expense lines, tap the green check mark under the **Approval** column for that specific expense line. After approving, tap **Submit for Reimbursement** to send the expense report to the next approval in the approval workflow.

Approving/Disapproving Reports



Approving and Disapproving Spend Requests

Certify's Pre-Approval feature enables end-users to budget for an expense before the spend occurs. Once the **Spend Request** is submitted, a **Manager** can see the expected costs for specific projects, trips, or people, providing opportunities for increased spend management.

Once a **Spend Request** has been submitted, the **Manager** can review the expected costs and approve or deny the request.

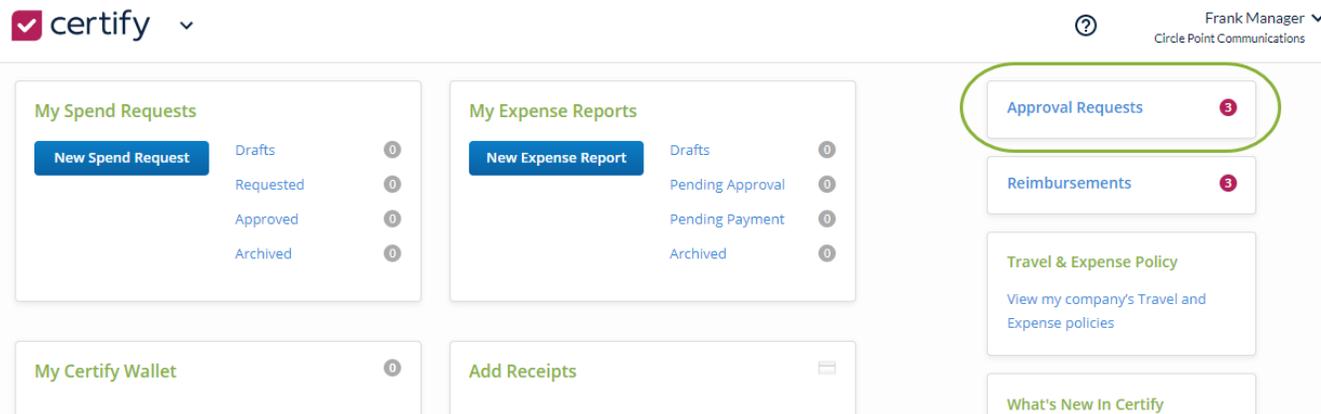
This article shows you, a **Certify Manager**, how to **approve** and **disapprove** a **Spend Request**.

Spend Requests and **Expense Reports** follow the same initial **Approval Workflow**. Though once a request is approved by all **Approvers** in the workflow, it is returned to the submitter's **Approved Spend Requests** folder rather than being moved along to the **Accountant**.

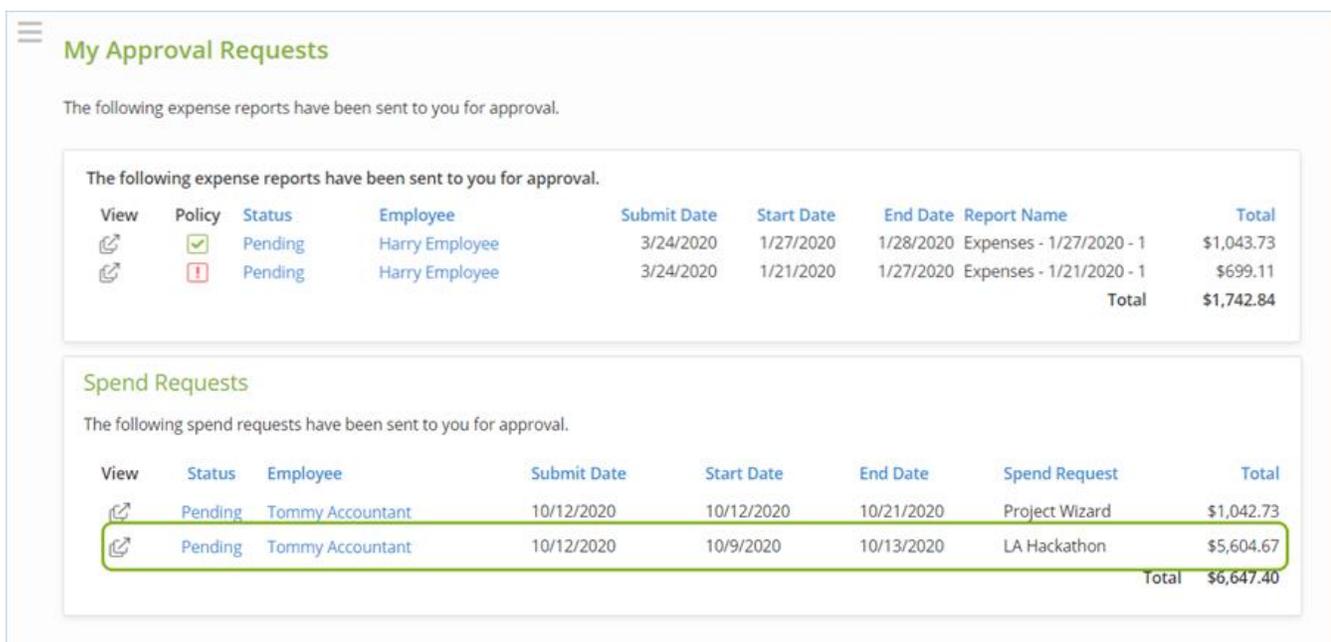
Approving a Spend Request

Step 1: Open **Approval Requests** on your **Certify** homepage.

Approving/Disapproving Reports



Step 2: Once the **Approval Requests** page opens, select a **Spend Request** to view.



Step 3: After the request opens, click the arrow (>) under the **Details** or **Reason** columns to see more information about the **Spend Request Items**.

Approving/Disapproving Reports

Approve Spend Request (Itemized)

Status: Pending Spend Request History [Full Approval History](#)

Current Approver: David Canatsey 10/09/2020 Requested Tommy Accountant

Department: Accounting 10/09/2020 Pending David Canatsey

Submitter: Tommy Accountant

Name: LA Hackathon

Dates: 10/09/2020 - 10/13/2020

[Complete Request](#)

[Disapprove Request](#)

Request Details [Approve All](#)

Actions	Status	Expense Type	Department	Category	Details	Requested Amount	Attachment	Reason
Approve >		Lodging	Sales	Lodging	>	1,955.12 USD		>
Approve >		Meals	Sales	Meals - Dinner	>	391.02 USD		>
Approve >		Travel	Sales	Airfare	>	3,258.53 USD		>
Total Requested						5,604.67 USD		

Step 4: View the **Spend Tracker** tool at the top of the expense report to compare the user's spend against the pre-approved amount from the spend request. This helps you know right away if the user spent more than what they were approved for, and by how much.

Linked Spend Request

Total: 3 Expenses \$1,347.76 spent of \$1,775.00 approved

Miscellaneous: 0 Expenses \$0.00 spent of \$0.00 approved

Lodging: 1 Expense \$455.98 spent of \$850.00 approved

Meals: 0 Expenses \$0.00 spent of \$0.00 approved

Rentals: 1 Expense \$213.66 spent of \$200.00 approved

Travel: 1 Expense \$678.12 spent of \$725.00 approved

Expenses [Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim.	Reim. Amt	Billable	Receipt	Reason
Approve >		12/11/2020	Lodging	✓ >	455.98	Yes	455.98	No		
Approve >		12/11/2020	Airfare	! >	678.12	Yes	678.12	No		
Approve >		12/31/2020	Rental Car	✓ >	213.66	Yes	213.66	No		
Total Non-Reimbursable					\$0.00					
Total Personal					\$0.00					
Total Reimbursable					\$1,347.76					
Total Disapproved					\$0.00					
Total Company Expenses					\$1,347.76					

Approving/Disapproving Reports

Step 5: Once the **Items** have been reviewed, select the **Approve** button for each line. To approve all **Items** at once, click the **Approval All** button.

Approve Spend Request (Itemized)

Status: Pending Spend Request History [Full Approval History](#)
Current Approver: David Canatsey 10/09/2020 Requested Tommy Accountant
Department: Accounting 10/09/2020 Pending David Canatsey
Submitter: Tommy Accountant
Name: LA Hackathon
Dates: 10/09/2020 - 10/13/2020

[Complete Request](#)
[Disapprove Request](#)

Request Details [Approve All](#)

Actions	Status	Expense Type	Department	Category	Details	Requested Amount	Attachment	Reason
Approve		Lodging	Sales	Lodging		1,955.12 USD		
Approve		Meals	Sales	Meals - Dinner		391.02 USD		
Approve		Travel	Sales	Airfare		3,258.53 USD		
Total Requested						5,604.67 USD		

Step 6: When an **Item** is approved, a green checkmark will appear in the **Status** column. Click **Complete Request** once all **Items** are approved.

Approve Spend Request (Itemized)

Status: Pending Spend Request History [Full Approval History](#)
Current Approver: David Canatsey 10/09/2020 Requested Tommy Accountant
Department: Accounting 10/09/2020 Pending David Canatsey
Submitter: Tommy Accountant
Name: LA Hackathon
Dates: 10/09/2020 - 10/13/2020

[Complete Request](#)
[Disapprove Request](#)

Request Details [Approve All](#)

Actions	Status	Expense Type	Department	Category	Details	Requested Amount	Attachment	Reason
Approve	✓	Lodging	Sales	Lodging		1,955.12 USD		
Approve	✓	Meals	Sales	Meals - Dinner		391.02 USD		
Approve	✓	Travel	Sales	Airfare		3,258.53 USD		
Total Requested						5,604.67 USD		

Approving/Disapproving Reports

Step 6: On the next page, click **Complete** to finish approving the **Spend Request**.

Complete Spend Request

Please review the spend request details for accuracy. Upon submission the spend request will be marked as complete and the submitter will be able to link the spend request to an expense report.

Spend Request Details

Submitter	Tommy Accountant (ttrainer@cirpoint.com)
Spend Request Name	LA Hackathon
Dates	10/9/2020 - 10/13/2020
Total	5,604.67 USD
Comments (optional)	<input type="text"/>

Your comments will be visible to anyone viewing this spend request.

Complete Cancel

Disapproving a Spend Request

A **Manager** can disapprove single **Items**, or an entire **Spend Request**. If the entire **Spend Request** is disapproved, it will return to the submitter's **Spend Request Drafts**.

Step 1: To disapprove single **Items**, click the arrow (>) under **Actions**. Select **Disapprove** in the **Other Actions** pop-up window.

Approve Spend Request (Itemized)

Status: Pending [Spend Request History](#) [Full Approval History](#)

Current Approver: David Canatsey

Department: Accounting

Submitter: Tommy Accountant

Name: LA Hackathon

Dates: 10/09/2020 - 10/13/2020

Complete Request

Disapprove Request

Request Details

Actions	Status	Expense Type	Department	Category	Details	Requested Amount	Attachment	Reason
Approve >	✓	Lodging	Sales	Lodging	>	1,955.12 USD		>
Approve >				Meals - Dinner	>	391.02 USD		>
Approve >				Airfare	>	3,258.53 USD		>
Total Requested						5,604.67 USD		

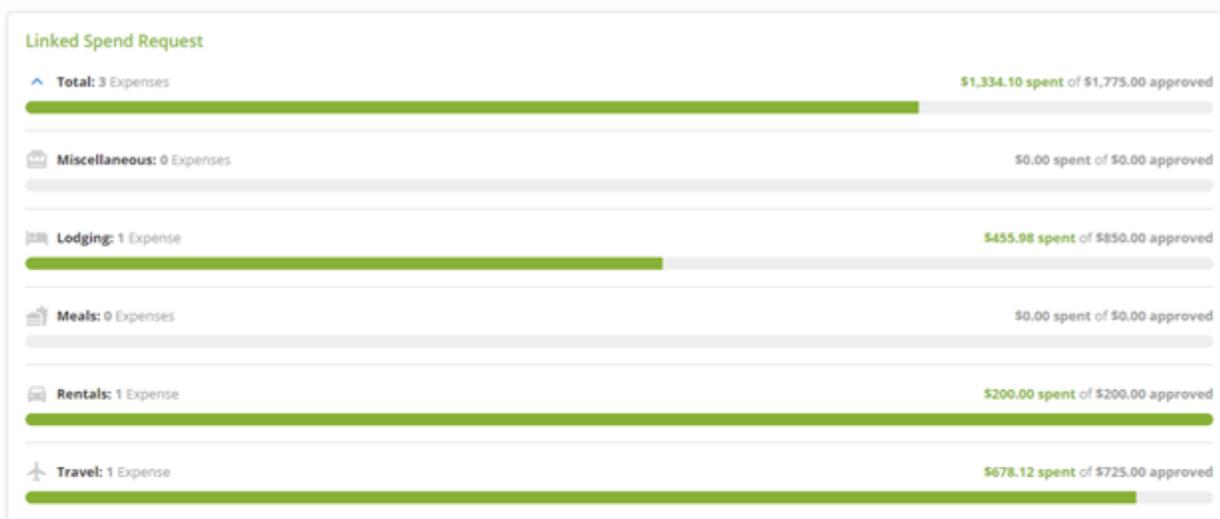
Approving/Disapproving Reports

Once the **Item** has been disapproved, a red **X** will appear in the **Status** column.

Request Details Approve All

Actions	Status	Expense Type	Department	Category	Details	Requested Amount	Attachment	Reason
Approve >	✓	Lodging	Sales	Lodging	>	1,955.12 USD		>
Approve >	✗	Meals	Sales	Meals - Dinner	>	391.02 USD		>
Approve >		Travel	Sales	Airfare	>	3,258.53 USD		>
Total Requested						5,604.67 USD		

Step 2: As items are **disapproved**, the **spend tracker** tool will update accordingly bringing the user under their budget.



Expenses Approve All

Actions	Status	Date	Category	Details	Amount	Reim.	Reim. Amt	Billable	Receipt	Reason
Approve >		12/1/2020	Lodging	✓ >	455.98	Yes	455.98	No		
Approve >		12/1/2020	Airfare	✗ >	678.12	Yes	678.12	No		
Approve >		12/3/2020	Rental Car	✓ >	200.00	Yes	200.00	No		

Edit: 12/4/2020, David Wallace says: Edited on 12/4/2020. You were only approved for \$200, Dwight!! The rest is coming out of your pocket!

Total Non-Reimbursable	\$0.00
Total Personal	\$0.00
Total Reimbursable	\$1,334.10
Total Disapproved	\$0.00
Total Company Expenses	\$1,334.10

Step 3: To disapprove a **Spend Request** completely, click the **Disapprove Request** button.

Approving/Disapproving Reports

Approve Spend Request (Itemized)

Status: Pending [Spend Request History](#) [Full Approval History](#)

Current Approver: David Canatsey 10/09/2020 Requested Tommy Accountant

Department: Accounting 10/09/2020 Pending David Canatsey

Submitter: Tommy Accountant

Name: LA Hackathon

Dates: 10/09/2020 - 10/13/2020

[Complete Request](#)

[Disapprove Request](#)

Request Details [Approve All](#)

Actions	Status	Expense Type	Department	Category	Details	Requested Amount	Attachment	Reason
Approve >		Lodging	Sales	Lodging	>	1,955.12 USD		>
Approve >		Meals	Sales	Meals - Dinner	>	391.02 USD		>
Approve >		Travel	Sales	Airfare	>	3,258.53 USD		>
Total Requested						5,604.67 USD		

Step 3: On the **Disapprove Spend Request Page**, click **Submit**.

Disapprove Spend Request

Please review the spend request details for accuracy. Upon submission, the spend request will be returned to the original submitter.

Spend Request Details

Submitter: Tommy Accountant (ttrainer@cirpoint.com)

Spend Request Name: LA Hackathon

Dates: 10/9/2020 - 10/13/2020

Total: \$5,604.67 USD

Comments (optional)

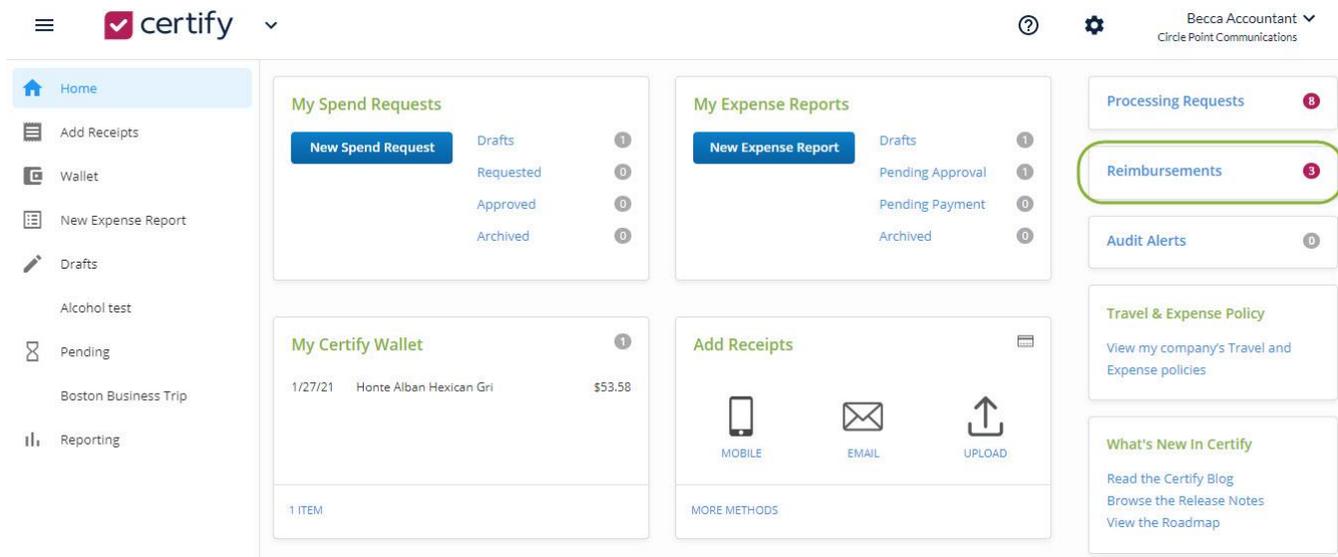
Your comments will be visible to anyone viewing this spend request.

[Submit](#) [Cancel](#)

Reimbursing through Certify Payments

Certify Payments enables your organization to reimburse employees using direct deposit, both domestically and internationally. To initiate reimbursements, your Certify Administrator must first designate you as a Treasurer within Certify. This article show you, a **Certify Treasurer**, how to reimburse your employees using **Certify Payments**.

Step 1: Login to your Certify account homepage. Click **Reimbursements**.



Step 2: In the **Reimbursements Requests** queue, select the reports you want to reimburse.

Please Note: Only reports from employees who have entered and saved their **Direct Deposit Information** will allow selection.

Please Note: If an employee has not saved their **Direct Deposit Information**, you may select **Mark as Paid** to reimburse outside of Certify.

Reimbursement Requests

The following reports have already been approved and processed. Use this page to reimburse employees and pay vendors for these reports. If the employee or vendor has direct deposit configured, you can reimburse that employee or pay the vendor by checking the report's checkbox, selecting a Payment Method, and clicking Reimburse Reports. If an employee or vendor does not have direct deposit configured, you can manually reimburse or pay the report and select Mark as Paid as Payment Method before clicking Reimburse Reports.

Expense Reports 2 of 2 visible

Employee	Expense Report	Approval Code	Process Date	Reimbursement Amount	Pay to Account	Payment Method
<input type="checkbox"/> Ned Newguy	Expenses - 5/01/2019 - 5/15/2019	14	5/23/2019	\$556.20 (none)	***** 0125	Mark as Paid
<input type="checkbox"/> Ned Newguy	Expenses - 6/5/2014 - 6/27/2019	16	6/28/2019	\$2,026.81 (none)	***** 0125	Mark as Paid
Total				\$2,583.01		

Invoice Reports 1 of 1 visible

Vendor	Invoice Report	Approval Code	Process Date	Due Date	Reimbursement Amount	Pay to Account	Payment Method
<input type="checkbox"/> Staples	Invoice - 5/23/2019	11	5/23/2019	5/30/2019	\$50.25 (none)	***** 0125	Mark as Paid
Total					\$50.25		

Reimburse Reports Reset

If an employee has incorrectly entered or has not changed their direct deposit information, a red exclamation point alerts you prior to processing.

Reimbursement Requests

The following reports have already been approved and processed. Use this page to reimburse employees and pay vendors for these reports. If the employee or vendor has direct deposit configured, you can reimburse that employee or pay the vendor by checking the report's checkbox, selecting a Payment Method, and clicking Reimburse Reports. If an employee or vendor does not have direct deposit configured, you can manually reimburse or pay the report and select Mark as Paid as Payment Method before clicking Reimburse Reports.

Expense Reports

Employee	Expense Report	Approval Code	Process Date	Reimbursement Amount	Pay to Account	Payment Method
<input type="checkbox"/> Ned Newguy	September	6		\$166.49	***** 0125	Mark as Paid
<input type="checkbox"/> Ned Newguy	November	9		\$35.00	***** 0125	Mark as Paid
<input type="checkbox"/> Mel Manager	October 2	13		\$186.00	***** 0125	TCFCU - Main Street (USD)
<input type="checkbox"/> Mel Manager	Attendees	15		\$23.00	***** 0125	TCFCU - Main Street (USD)
Total				\$490.49		

This employee has not completed all necessary direct deposit information required for reimbursement. This expense report must be reimbursed manually.

Invoice Reports

Vendor	Invoice Report	Approval Code	Process Date	Due Date	Reimbursement Amount	Pay to Account	Payment Method
<input type="checkbox"/> LL Bean	Invoice - 8/9/20	5			\$464.16	***** 0125	TCFCU - Main Street (USD)
Total					\$464.16		

Reimburse Reports Reset

Step 3: Click Reimburse Report. Depending on your company's ACH contract, reimbursement is sent to the employee within 2-7 business days.

Reimbursement Requests

The following reports have already been approved and processed. Use this page to reimburse employees and pay vendors for these reports. If the employee or vendor has direct deposit configured, you can reimburse that employee or pay the vendor by checking the report's checkbox, selecting a Payment Method, and clicking Reimburse Reports. If an employee or vendor does not have direct deposit configured, you can manually reimburse or pay the report and select Mark as Paid as Payment Method before clicking Reimburse Reports.

Expense Reports 2 of 2 visible

	Employee	Expense Report	Approval Code	Process Date	Reimbursement Amount	Pay to Account	Payment Method
<input type="checkbox"/>	[i]	Expenses - 5/01/2019 - 5/15/2019	14	5/23/2019	\$556.20 (none)		Mark as Paid
<input type="checkbox"/>	[i]	Expenses - 6/5/2014 - 6/27/2019	16	6/28/2019	\$2,026.81 (none)		Mark as Paid
Total					\$2,583.01		

Invoice Reports 1 of 1 visible

	Vendor	Invoice Report	Approval Code	Process Date	Due Date	Reimbursement Amount	Pay to Account	Payment Method
<input type="checkbox"/>	[i]	Invoice - 5/23/2019	11	5/23/2019	5/30/2019	\$50.25 (none)		Mark as Paid
Total						\$50.25		

Reimburse Reports Reset

Disapproving an Expense Report – Approvers

Occasionally, you may need to disapprove an expense report due to policy violations or other issues. A disapproved expense report is sent back to the submitter's **Drafts** folder where they can make edits and resubmit their expense report.

Step 1: On your account home page, select the number of items under **My Approval Requests**.

My Spend Requests

New Spend Request

- Drafts 0
- Requested 0
- Approved 0
- Archived 0

My Expense Reports

New Expense Report

- Drafts 0
- Pending Approval 0
- Pending Payment 0
- Archived 0

Approval Requests 3

Reimbursements 3

Travel & Expense Policy

[View my company's Travel and Expense policies](#)

What's New In Certify

Step 2: On the next page, you will see all expense reports awaiting your approval. To view a specific expense report, click the **Employee** name or the view (document) icon under the **View** column. This will open the expense report in a new browser window.

My Approval Requests

The following expense reports have been sent to you for approval.

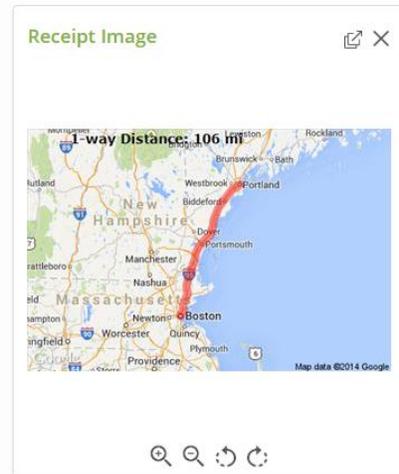
View	Policy	Status	Employee	Submit Date	Start Date	End Date	Expense Report	Total
		Pending	Meredith Employee	10/31/2016	9/1/2016	9/15/2016	ReportExecutive - 9/1/2016 - 9/15/2016	\$410.73
Total								\$410.73

Step 3: To disapprove the entire expense report, select **Disapprove Expense Report** next to **Actions**. When you select **Disapprove Expense Report**, a popup will advise you that the expense report will be sent back to the submitter, and will ask you to confirm the disapproval. Click **Yes** to continue the disapproval process.

Approve Expense Report

Status: Pending Approval
Current Approver: Dan Manager
Department: General & Admin (01)
Summary: Meredith Employee
 ReportExecutive - 10/1/2016 - 10/15/2016
 10/1/2016 - 10/15/2016
[Print Report](#)
[Submit for Reimbursement](#)
[Disapprove Report](#)

Approval History:
 11/10/2016 Submitted Meredith Employee
 Pending Dan Manager
[Send Email to All](#)
[Full Approval History](#)



Expenses [Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve		10/1/2016	Mileage		119.84	Yes	119.84	No		
Approve		10/3/2016	Lodging		191.96	Yes	191.96	No		
Approve		10/3/2016	Coffee, Tea, Snacks		5.82	Yes	5.82	No		
Approve		10/4/2016	Meals - Large Group		93.11	Yes	93.11	No		
Total Non-Reimbursable					\$0.00					
Total Personal					\$0.00					
Total Reimbursable					\$410.73					
Total Disapproved					\$0.00					
Total Company Expenses					\$410.73					

Confirmation ✕

Disapproving this expense report will send it back to the submitter. Notes added to expenses will be preserved.

Are you sure you wish to disapprove this expense report?

Step 4: By selecting **Disapprove Expense Report**, an email preview will be displayed where you can enter text for the submitter in the **Enter your comments** in the field provided. Click **Next** to complete the disapproval process.

Disapprove Expense Report

This is the message that will be sent to the expense report submitter, as well as any previous approvers of this expense report. You may add your own comments if you like. Click Next to disapprove this expense report.

To memployee@circp1.com
CC dmanager@circp1.com
Subject Expense Report Disapproval From Dan Manager (dmanager@circp1.com)
Body Hello Meredith,

Dan Manager (dmanager@circp1.com) has disapproved an expense report that you submitted.

Enter your comments:

Expense Report Summary

Expense Report Name: ReportExecutive - 9/1/2016 - 9/15/2016
Dates: 9/1/2016 - 9/15/2016
Disapproved Total: \$410.73

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

Back

Next

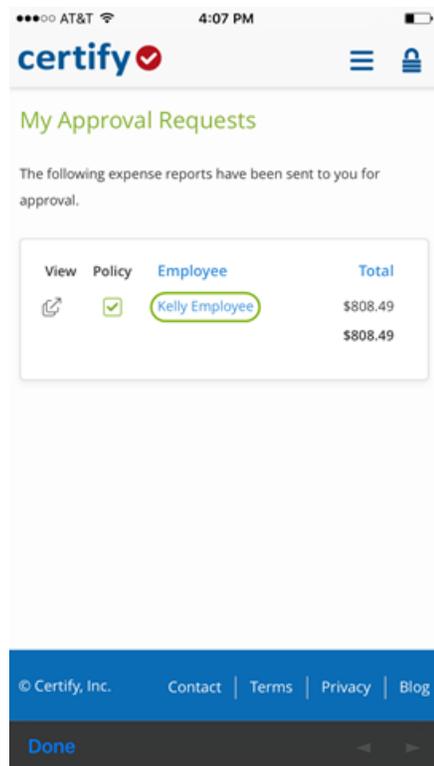
Certify Mobile - Approving/Disapproving

Certify allows you to approve and process expense reports using the Certify Mobile app. This article shows you how to approve or process expense reports using Certify Mobile.

Step 1: On your Certify Mobile app Home screen, tap **Approval Requests**. If the number of approval requests is incorrect, tap **Sync** to update the data.

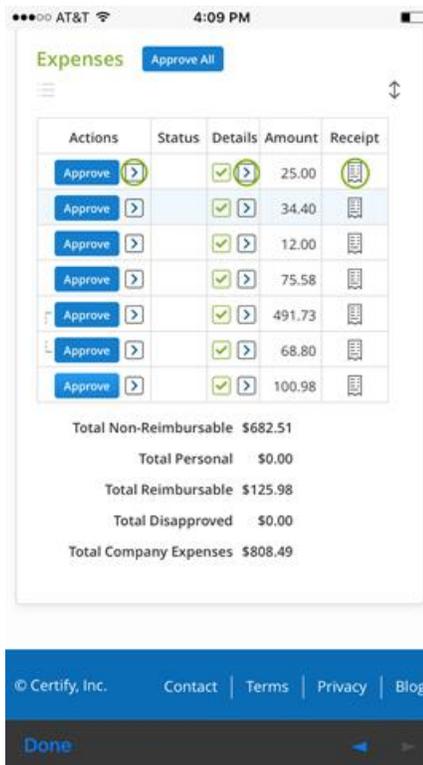


Step 2: To view an expense report, tap the view (document) icon under the **View** column next to the expense report you would like to open.

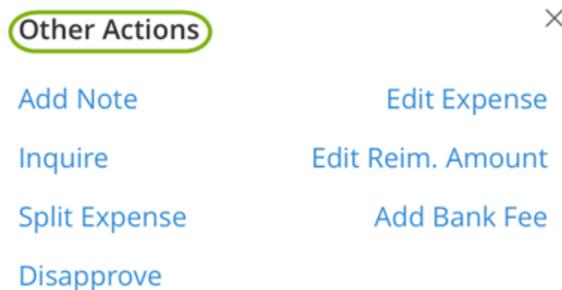


Step 3: To view a specific receipt in an expense line, click the view (document) icon under the **Receipt** column. A red exclamation mark under the **Receipt** column indicates that there is no receipt image attached to the expense line. A green check mark in the **Receipt** column indicates that there is no receipt image attached to the expense line, however, no receipt is required for this expense according to your company’s policies.

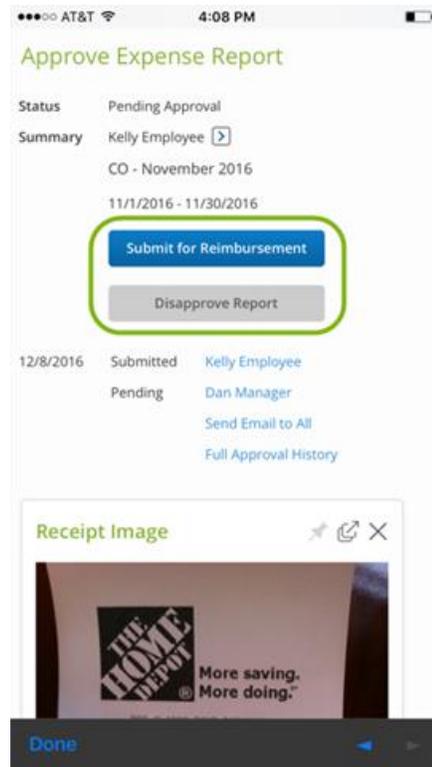
To view vendor and location details, tap the arrow (>) under the **Details** column. A red exclamation mark under the **Details** column indicates that the expense may be out of company policy.



If you have a question about an expense line, or about the expense report, there are several actions available in the **Other Actions** menu. To access this menu, tap the arrow (>) under the **Approval** column. In the **Other Actions** menu, select the action name.



Step 4: To approve the entire expense report, tap **Approve All** next to **Expenses**. To approve specific expense lines, tap the green check mark under the **Approval** column for that specific expense line. After approving, tap **Submit for Reimbursement** to send the expense report to the next approver in the approval workflow.



Approving with InstantAudit

With **InstantAudit**, **Approvers** gain beneficial information to help make approval decisions. When a **Submitter** sends an expense report for reimbursement, **Certify InstantAudit** combs through the expenses, and flags those that fall into any of the **InstantAudit Rules** set by the **Certify Administrator**. Flagged expenses are then sent to the **Approval Requests** page with the **Audit** flag to indicate the expense needs extra attention.

This article shows you, a **Certify Approver**, how to view **InstantAudit** flags on your **Approval Requests** page.

Step 1: On your **Certify** homepage, click **Approval Requests**.

My Spend Requests

[New Spend Request](#)

- Drafts 0
- Requested 0
- Approved 0
- Archived 0

My Expense Reports

[New Expense Report](#)

- Drafts 0
- Pending Approval 0
- Pending Payment 0
- Archived 0

Approval Requests 3

Reimbursements 3

Travel & Expense Policy

[View my company's Travel and Expense policies](#)

What's New In Certify

My Certify Wallet 0

Add Receipts +

Step 2: The **Approval Requests** page opens. Click the **View** icon to view the **Submitter's** expense report.

My Approval Requests

Expense Reports

The following reports have been sent to you for approval.

View	Policy	Audit	Status	Employee/Vendor	Submit Date	Invoice Date	Due Date	Report	Total
	<input checked="" type="checkbox"/>		Approved	Amazon	5/23/2019	5/22/2019	5/30/2019	Invoice - 5/22/2019	\$25.00
Total									\$25.00

Step 3: You now have three data points that can help inform a better approval decision:

- **InstantAudit Flag:** A flag in the **Audit** column indicates if the expense has triggered one of your company's **InstantAudit** rules.
- Submitter's return **Reply** note from the **Inquiry**
- Auditor's note

Status indicates that an **Inquiry** is pending with the submitter. It can be helpful in letting the **Approver** know to ignore this report until the submitter answers.

My Approval Requests

The following expense reports have been sent to you for approval.

The following expense reports have been sent to you for approval.

View	Policy	Audit	Status	Employee	Submit Date	Start Date	End Date	Expense Report	Total	
			Pending	Ellie Employee	10/8/2019	10/1/2019	10/8/2019	Oct 8 Business Trip	\$478.40	
			Pending	Erin Employee	10/8/2019	10/1/2019	10/30/2019	Trip Expenses October	\$43.12	
			Pending	Erin Employee	10/8/2019	10/2/2019	10/6/2019	Expenses - 10/2/2019 - 10/6/2019	\$51.10	
			Pending	Erin Employee	10/8/2019	10/1/2019	10/8/2019	Expenses - 10/8/2019	\$25.00	
			Pending	Ellie Employee	10/10/2019	10/1/2019	10/10/2019	North Carolina Business Trip	\$479.72	
			Pending	Ellie Employee	10/10/2019	10/8/2019	10/8/2019	Expenses - 10/8/2019	\$69.78	
			Pending	Ellie Employee	10/10/2019	10/10/2019	10/10/2019	Expenses - 10/10/2019	\$86.28	
			Pending	Ellie Employee	10/10/2019	10/10/2019	10/10/2019	Expenses - 10/8/2019	\$86.28	
			Pending	Erin Employee	10/10/2019	10/10/2019	10/10/2019	Erin's Expenses for Layover	\$0.00	
									Total	\$1,319.68

You can now approve your expenses as normal, using the **InstantAudit** flags to help make your approval decision.

Using Administrative Flags

Administrative Flags can be manually added to submitted expense lines to note report submitter actions. After an Approver adds a note to an expense line, it will be flagged for review. These flags are known as **Administrative Flags**.

This article shows you, an **Approver**, how to review and enter administrative flags.

Step 1: On your **Certify** homepage, click **Approval Requests**.

The screenshot shows the Certify homepage dashboard. At the top left is the 'certify' logo. At the top right, there is a user profile for 'Frank Manager' with a dropdown arrow and a notification icon. The main content area is divided into several sections: 'My Spend Requests' with a 'New Spend Request' button and a list of status counts (Drafts: 0, Requested: 0, Approved: 0, Archived: 0); 'My Expense Reports' with a 'New Expense Report' button and a list of status counts (Drafts: 0, Pending Approval: 0, Pending Payment: 0, Archived: 0); 'My Certify Wallet' with a count of 0; 'Add Receipts' with a count of 0; and a right-hand navigation menu with 'Approval Requests' (3), 'Reimbursements' (3), 'Travel & Expense Policy' (with a link to view policies), and 'What's New In Certify'. The 'Approval Requests' link is circled in green.

Step 2: Select the report you want to review.

My Approval Requests

The following reports have been sent to you for approval.

The following reports have been sent to you for approval.

View	Policy	Status	Employee/Vendor	Submit Date	Start Date	Due Date	Report	Total
		Approved	NuAmazon	10/3/2017	8/15/2016	11/1/2017	Invoice - 8/15/2016	\$443.00
		Inquiry	Kelly Employee	10/5/2017	8/1/2017		ReportExecutive - 8/1/2017 - 8/15/2017	\$410.73
		Inquiry	Kelly Employee	10/5/2017	8/21/2017		Expenses - 8/21/2017	\$34.40
		Pending	Kelly Employee	10/9/2017	8/24/2017		Expenses - 8/24/2017	\$16.60
Total								\$904.73

Please Note: If an administrative flag has been added to a user's expense report within the last 90 days, details from those prior flags will be present in the **Approval Requests** queue to hover over.

Step 3: Select the **Other Actions** menu of the specific expense line that needs a note.

The screenshot shows the 'Expenses' interface with a table of expense lines. The 'Other Actions' menu is open for the selected expense line, showing options like 'Add Note', 'Edit Expense', 'Inquire', 'Split Expense', and 'Disapprove'. The 'Add Note' option is highlighted with a green circle. The expense line details are visible in the background, including the amount of \$16.60 and the status 'No' for reimbursement.

Step 4: In the **Enter Note** box, enter your note. Click the **Flag for Review** checkbox, and then **Save**.

Add a Note to an Expense

Your note will be saved with this expense for future reference.

Enter Note

Please use correct expense category next time.

Flag for Review

Step 5: The note is now permanently added to the expense line. This report will be added to the **Expense_Policy Review** report, and also added to the user's count of administrative flags within the last 90 days.

Expenses

Approve All

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
Approve >		8/23/2017	Miscellaneous	<input checked="" type="checkbox"/> >	16.60	No	0.00	No		>
Edit 10/9/2017, Jon Manager says: Please use correct expense category next time. (flagged)										

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