



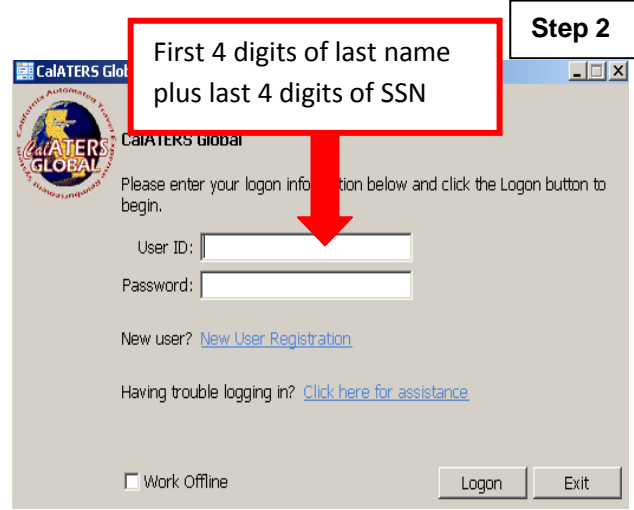
Create Expense Reimbursement

GUIDE CARD-G05

Instructions for creating Expense Reimbursement (no Specialized Account Coding)

From the CalATERS Global web site at http://www.sco.ca.gov/calaters_global.html Under Global Sign In, click CalATERS Global.

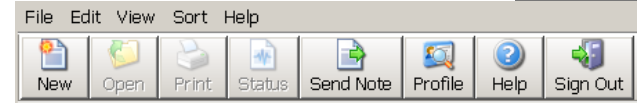
Step 1



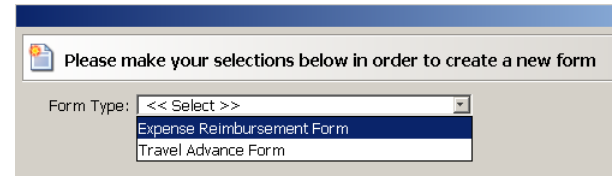
Step 2

Enter the User ID and Password, and then click **Logon**.

Step 3

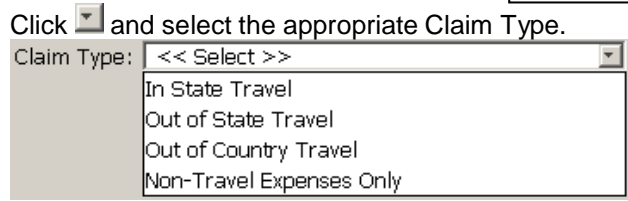


Click the **New** icon to begin the Expense Reimbursement form.



Select "Expense Reimbursement Form".

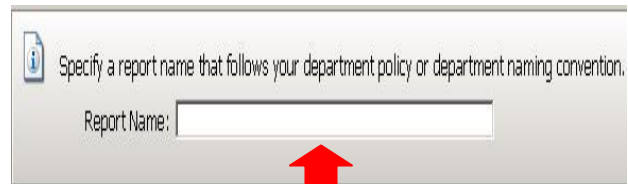
Step 4



Click **Ok**.

Step 5

Key the Report Name (based on department policy), and then click **Ok**.



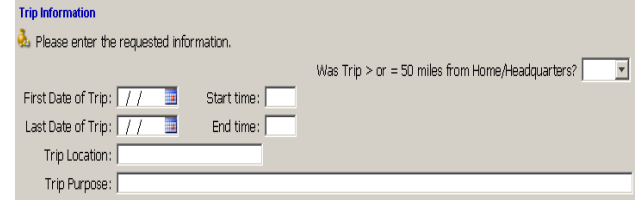
Home Index - Fiscal Year - Report Name (i.e 7000-2012-July XX travel)

Step 6

Complete trip information as requested.

This example is based on Claim Type-In State Travel and Trip Type-Regular Travel.

Enter the First Date of Trip, Last Date of Trip (or click to select date from the calendar), start/end time, Trip Location and Trip Purpose.



Click to answer question: Was Trip > or = 50 miles from Home/Headquarters?



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GUIDE CARD-G05

Instructions for creating Expense Reimbursement (no Specialized Account Coding)

No entry required.

Click or to proceed.

Step 7

Click or to select an expense.

Step 8

Enter required information (based on the expense selected).

Example 1: Breakfast

Example 2: Lodging

Step 9

After all expenses have been entered,
Click or to proceed.

Step 10

The Submission tab displays your approver. If necessary use **Change Approver** to select a different approver for this form, **Add Approver** to add an additional approver, or **Send Copy** (based on department policy).

Step 11

Select print options and . Transmittal page will display.

Step 12

Review the Receipts, Review Items and Travel Advance Recovery tabs (if applicable). Review Summary, then click Submission tab.

Enter password and click

Click and then click .

Attach receipts to Transmittal Sheet and forward to approver. Send to DAO by mail or scan + attached to email: CALATERSHelpDesk@fire.ca.gov