



# Certify User Guide

## APPROVING EXPENSE REPORTS



Copyright © 2020

All Rights Reserved

*This version is current as of January 1, 2020*  
*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.*

TABLE OF CONTENTS

TABLE OF CONTENTS ..... 3

APPROVING REPORTS ..... 4

    Approver’s Review Tools ..... 5

    Approving/Disapproving Reports..... 9

INDEX ..... 28

# APPROVING EXPENSE REPORTS

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

Approvers can:

- Approve and then the report forward 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 account homepage, select **Approval Requests**.

The screenshot shows the Certify account homepage. The top navigation bar includes 'My Approval Requests', 'Dan Manager', 'My Account', 'Support', and 'Logout'. Below this, there are tabs for 'Home', 'Travel', 'Wallet', and 'Analytics'. The main content area is divided into several sections: 'My Certify Wallet' (empty), 'My Expense Reports' (with a 'New Expense Report' button and links for Drafts, Pending Approval, Pending Payment, and Archived), 'Add Receipts' (with links for MOBILE, EMAIL, and UPLOAD), and 'Schedule Expense Reports' (with a message about ReportExecutive being off). On the right side, there is a sidebar with 'Approval Requests' (highlighted with a green circle and a red notification badge), 'What's New In Certify', and 'SpendSmart™'.

**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:** 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

## Approver's Review Tools

- **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.

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
<a href="#">Approve</a>		10/1/2016	Mileage		119.84	Yes	119.84	No		
<a href="#">Approve</a>					191.96	Yes	191.96	No		
<a href="#">Approve</a>					5.82	Yes	5.82	No		
<a href="#">Approve</a>					93.11	Yes	93.11	No		
<div>Other Actions <span>×</span></div> <div><div><a href="#">Add Note</a></div><div><a href="#">Inquire</a></div><div><a href="#">Split Expense</a></div><div><a href="#">Disapprove</a></div></div> <div><div><a href="#">Edit Expense</a></div><div><a href="#">Edit Reim. Amount</a></div><div><a href="#">Add Bank Fee</a></div></div>										
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**.

# Approver's Review Tools

The screenshot shows the Certify Approver's Review Tools dashboard. At the top, there is a navigation bar with the Certify logo, user name 'Dan Manager', and links for 'My Account', 'Support', and 'Logout'. Below the navigation bar, there are tabs for 'Home', 'Travel', 'Wallet', and 'Analytics'. The main content area is divided into several sections: 'My Certify Wallet' (empty wallet, cash advance balance \$0.00), 'My Expense Reports' (New Expense Report button, list of reports: Drafts, Pending Approval, Pending Payment, Archived), 'Add Receipts' (Mobile, Email, Upload methods), 'Schedule Expense Reports' (ReportExecutive status), 'Approval Requests' (2 requests), 'What's New In Certify' (Read the Certify Updates Blog), and 'SpendSmart' (no recent ratings to display).

**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	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**.

# Approver's Review Tools

Expenses [Approve All](#)

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

Other Actions

- [Add Note](#)
- [Edit Expense](#)
- [Inquire](#)
- [Split Expense](#)
- [Add Bank Fee](#)
- [Disapprove](#)

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

This is missing a receipt. Do you have one?

Allow Expense Edit >>

☐

Save

Cancel

**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.

## 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



# Approving/Disapproving Reports

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
<a href="#">Approve</a>		10/1/2016	Mileage		119.84	Yes	119.84	No		<a href="#">Details</a>
<a href="#">Approve</a>		10/3/2016	Lodging		191.96	Yes	191.96	No		<a href="#">Details</a>
<a href="#">Approve</a>		10/3/2016	Coffee, Tea, Snacks		5.82	Yes	5.82	No		<a href="#">Details</a>
<a href="#">Approve</a>		10/4/2016	Meals - Large Group		93.11	Yes	93.11	No		<a href="#">Details</a>
<a href="#">Approve</a>		10/9/2016	Other Transportation		2.75	Yes	2.75	No		<a href="#">Details</a>

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**.

travel & expense made easy

Dan Manager

My Account

Support

Logout

Home

Travel

Wallet

Analytics

My Certify Wallet

0

Your wallet is empty

Add receipts or expenses to your Wallet.

Cash Advance Balance \$0.00

0 ITEMS

My Expense Reports

0

New Expense Report

Drafts

Pending Approval

Pending Payment

Archived

Approval Requests

2

What's New In Certify

Read the Certify Updates Blog

SpendSmart™

There are no recent ratings to display.

Ratings & Reviews

Add Receipts

MOBILE

EMAIL

UPLOAD

MORE METHODS

Schedule Expense Reports

ReportExecutive™ is off.

Meet your fully automated expense report.

CONFIGURE ReportExecutive™

Certify User Guide V.08.Q1 2020





9

## 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.

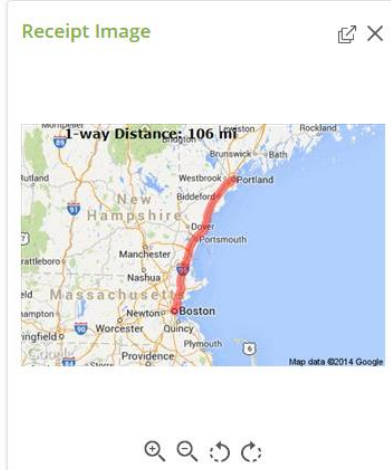
To view a receipt in an expense line, click the view (document) icon under the **Receipt** column. A red exclamation mark under the **Receipt** column indicates that there is no receipt image attached to the expense line. A green checkmark in the **Receipt** column indicates that there is no receipt 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.

# Approving/Disapproving Reports

## Approve Expense Report

Status	Pending Approval	Approval History	
Current Approver	Dan Manager	11/10/2016	Submitted Meredith Employee
Department	General & Admin (01)	Pending	Dan Manager
Summary	Meredith Employee		Send Email to All
	Report Executive - 10/1/2016 - 10/15/2016		Full Approval History
	10/1/2016 - 10/15/2016		
	Print Report		
	<a href="#">Submit for Reimbursement</a>		
	<a href="#">Disapprove Report</a>		



Expenses [Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
<a href="#">Approve</a>		10/1/2016	Mileage		119.84	Yes	119.84	No		<a href="#">Details</a>
<a href="#">Approve</a>		10/3/2016	Lodging					No		<a href="#">Details</a>
<a href="#">Approve</a>		10/3/2016	Coffee, Tea, Snacks					No		<a href="#">Details</a>
<a href="#">Approve</a>		10/4/2016	Meals - Large Group					No		<a href="#">Details</a>
Total Non-Reimbursable										
Total Personal										
Total Reimbursable					\$410.73					
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

**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
<a href="#">Approve</a>		10/1/2016	Mileage		119.84	Yes	119.84	No		<a href="#">Details</a>
<a href="#">Approve</a>					191.96	Yes	191.96	No		<a href="#">Details</a>
<a href="#">Approve</a>					5.82	Yes	5.82	No		<a href="#">Details</a>
<a href="#">Approve</a>					93.11	Yes	93.11	No		<a href="#">Details</a>
Total Non-Reimbursable					\$0.00					
Total Personal					\$0.00					
Total Reimbursable					\$410.73					
Total Disapproved					\$0.00					
Total Company Expenses					\$410.73					

Other Actions

[Add Note](#)

[Edit Expense](#)

[Inquire](#)

[Edit Reim. Amount](#)

[Split Expense](#)

[Add Bank Fee](#)

[Disapprove](#)

## Approving/Disapproving Reports

**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](#)

Approval History

11/10/2016 Submitted [Meredith Employee](#)

Pending [Dan Manager](#)

[Send Email to All](#)

[Full Approval History](#)

**Submit for Reimbursement**

Disapprove Report

### Receipt Image



### Expenses

**Approve All**

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
		10/1/2016	Mileage	 	119.84	Yes	119.84	No		
		10/3/2016	Lodging	 	191.96	Yes	191.96	No		
		10/3/2016	Coffee, Tea, Snacks	 	5.82	Yes	5.82	No		
		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

**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.

# Approving/Disapproving Reports

## 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

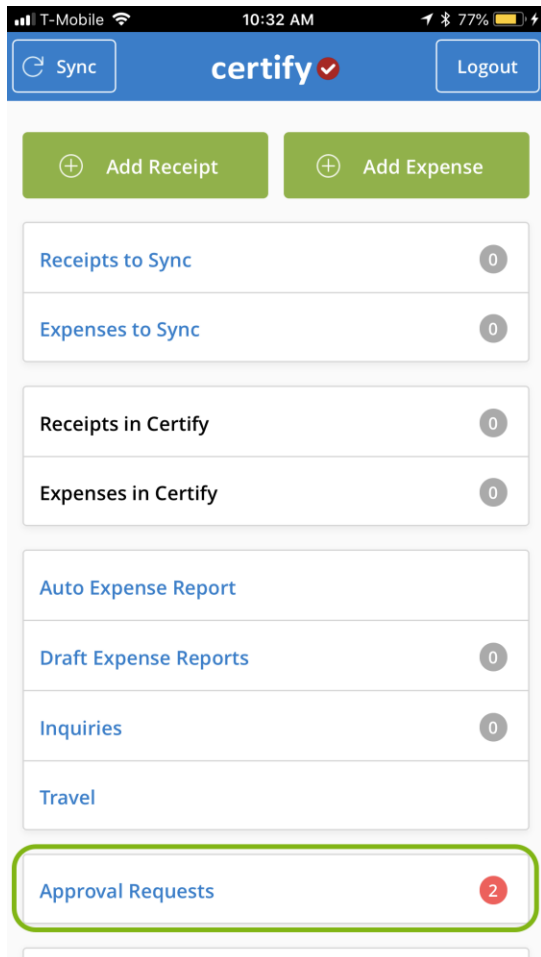
Cancel

## 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.

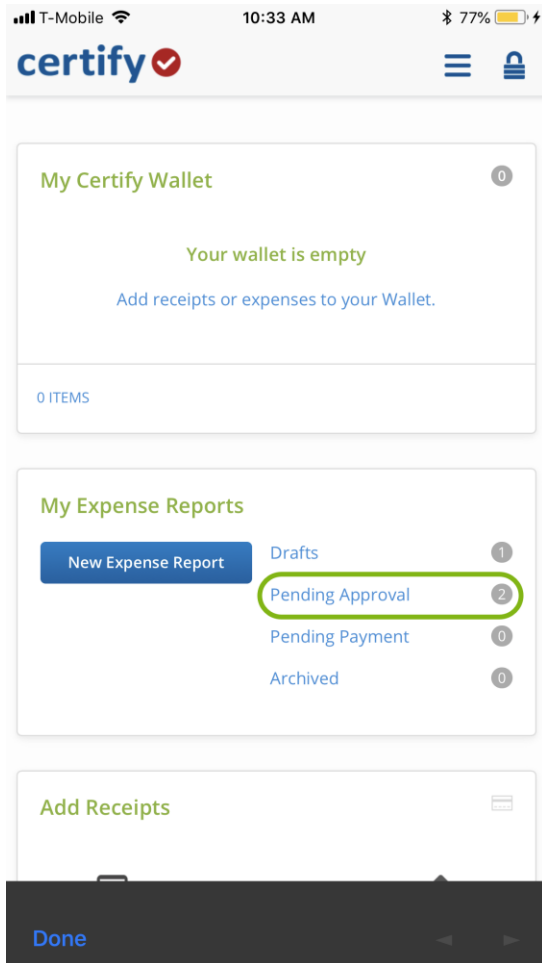
**Step 1:** On your Certify Mobile app Home screen, tap **Approval Requests**. If the number of approval requests is incorrect, tap **Sync** to update the data.

## 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.

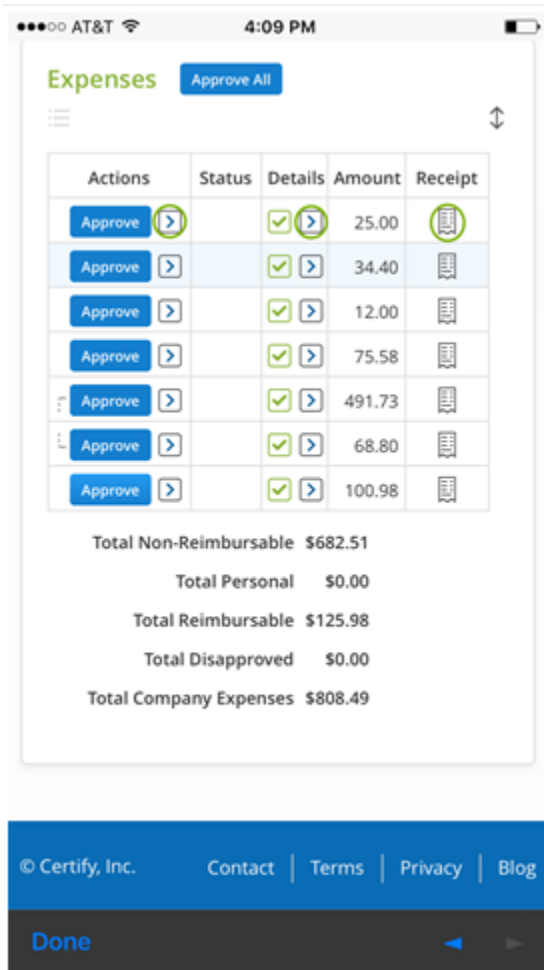
# Approving/Disapproving Reports



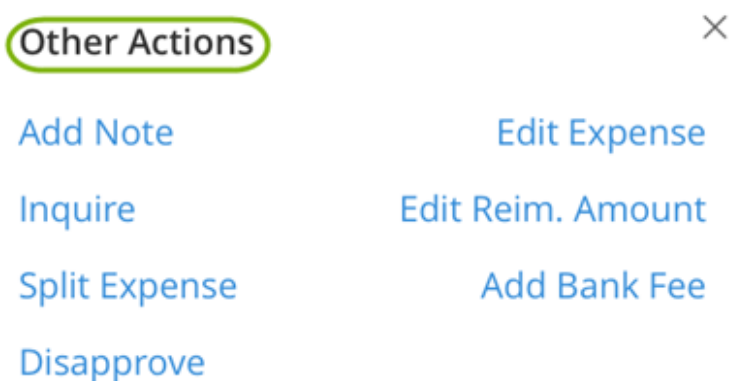
**Step 3:** To view a specific receipt in an expense line, click the view (document) icon under the **Receipt** column. A red exclamation mark under the **Receipt** column indicates that there is no receipt image attached to the expense line. A green check mark in the **Receipt** column indicates that 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



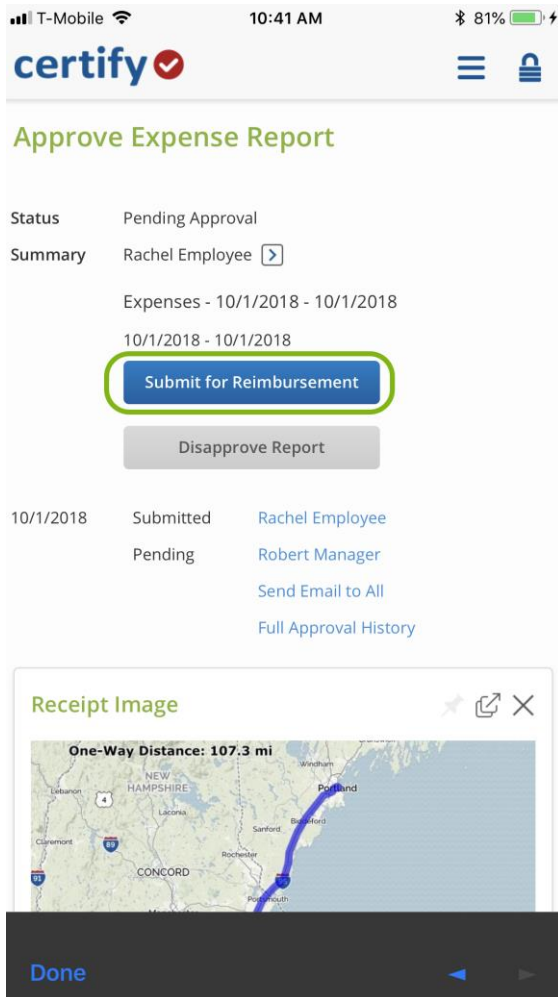
If you have a question about an expense line, or about the expense report, there are several actions available in the Other Actions menu. To access this menu, tap the arrow (>) under the **Actions** column. In the **Other Actions** menu, select the action name.



**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.



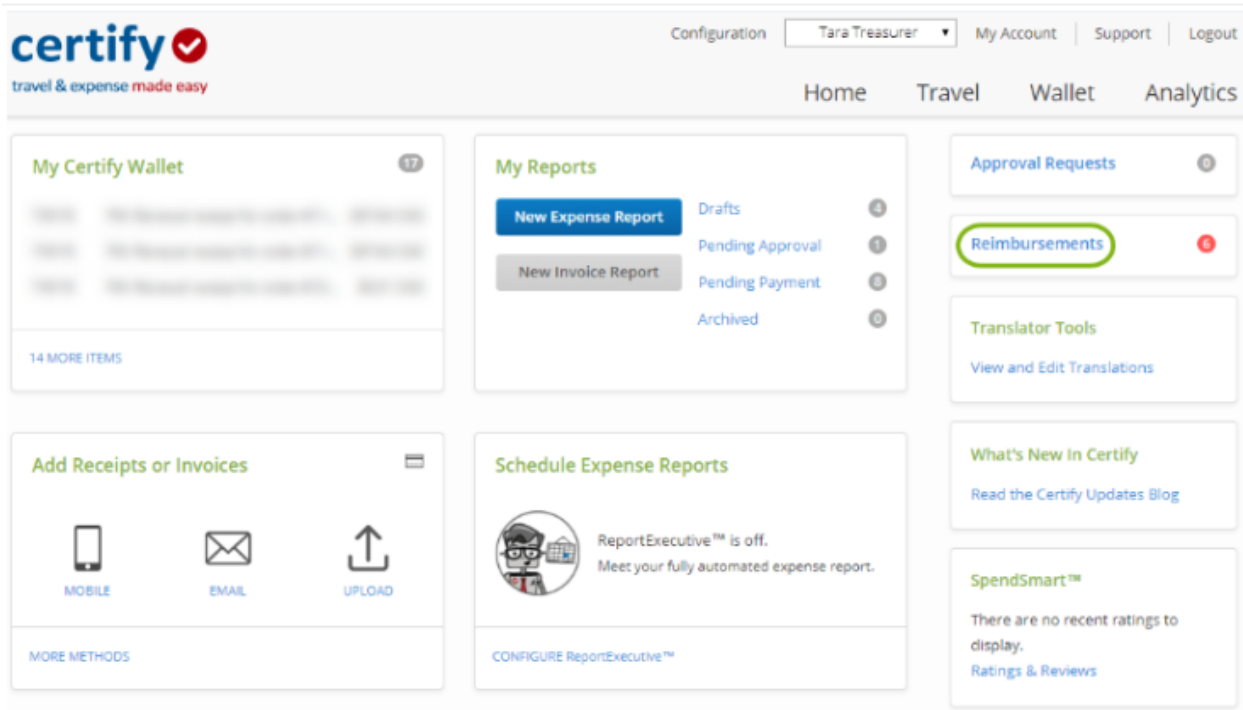
# Approving/Disapproving Reports



## 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

			Approval		Reimbursement	Pay to	Payment Method
	Employee	Expense Report	Code	Process Date	Amount	Account	
<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	10		\$80.00	***** 0125	TCFCU - Main Street (USD) ▼
<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		

### Invoice Reports

			Approval			Reimbursement	Pay to	Payment Method
	Vendor	Invoice Report	Code	Process Date	Due Date	Amount	Account	
<input type="checkbox"/>	LL Bean	Invoice - 8/9/20...	5			\$464.16	***** 0126	TCFCU - Main Street (USD) ▼
Total						\$464.16		

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

<input type="checkbox"/>	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 checked="" type="checkbox"/>	Ned Newguy	November	9		\$35.00	***** 0125	Mark as Paid
<input type="checkbox"/>	Mei Manager	October 2	13		\$186.00	***** 0125	TCFCU - Main Street (USD)
<input type="checkbox"/>	Mei 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

<input type="checkbox"/>	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

<input type="checkbox"/>	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 checked="" type="checkbox"/>	Ned Newguy	November	9		\$35.00	***** 0125	Mark as Paid
<input checked="" type="checkbox"/>	Mel Manager	October	10		\$80.00	***** 0125	TCFCU - Main Street (USD)
<input checked="" 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		

### Invoice Reports

<input type="checkbox"/>	Vendor	Invoice Report	Approval Code	Process Date	Due Date	Reimbursement Amount	Pay to Account	Payment Method
<input checked="" type="checkbox"/>	LL Bean	Invoice - 8/9/20	5			\$464.16	***** 0126	TCFCU - Main Street (USD)
Total						\$464.16		

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 Certify Wallet

Your wallet is empty

Add receipts or expenses to your Wallet.

Cash Advance Balance

\$0.00

0 ITEMS

### My Expense Reports

New Expense Report

Drafts

0

Pending Approval

0

Pending Payment

0

Archived

0

### Approval Requests

1

### What's New In Certify

[Read the Certify Updates Blog](#)

### SpendSmart™

There are no recent ratings to display.

[Ratings & Reviews](#)

### Add Receipts



MOBILE



EMAIL



UPLOAD

[MORE METHODS](#)

### Schedule Expense Reports



ReportExecutive™ is off.  
Meet your fully automated expense report.

[CONFIGURE ReportExecutive™](#)

**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](#)

### Receipt Image



### Expenses

[Approve All](#)

Actions	Status	Date	Category	Details	Amount	Reim	Reim Amt	Billable	Receipt	Reason
<a href="#">Approve</a> 		10/1/2016	Mileage	 	119.84	Yes	119.84	No		
<a href="#">Approve</a> 		10/3/2016	Lodging	 	191.96	Yes	191.96	No		
<a href="#">Approve</a> 		10/3/2016	Coffee, Tea, Snacks	 	5.82	Yes	5.82	No		
<a href="#">Approve</a> 		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?

[Yes](#)

[No](#)

**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

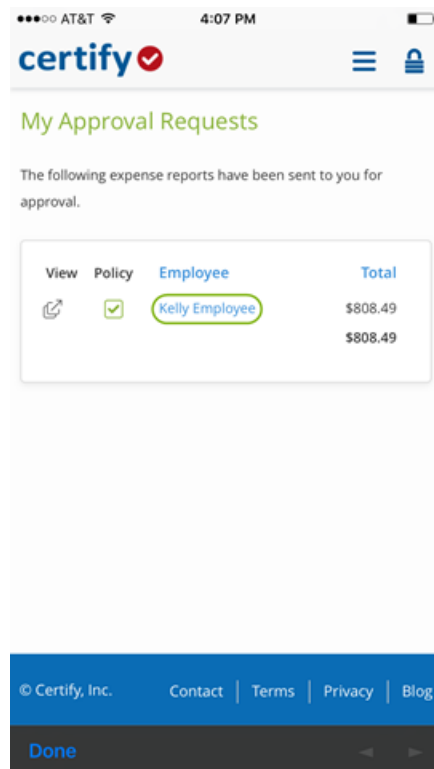
Certify allows you to approve and process expense reports using the Certify Mobile app. This article shows you how to approve or process expense reports using Certify Mobile.

**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.



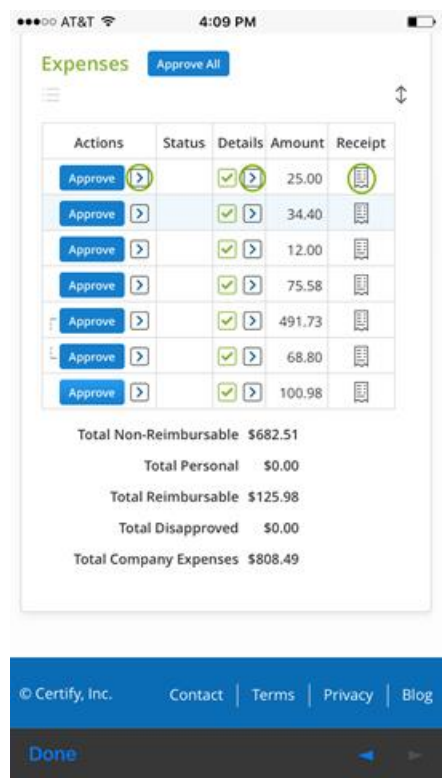


**Step 2:** To view an expense report, tap the view (document) icon under the **View** column next to the expense report you would like to open.



**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.

Other Actions

Add Note

Inquire

Split Expense

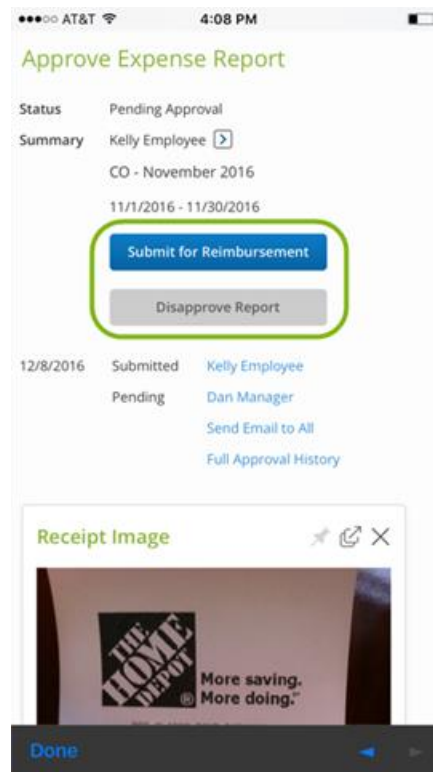
Disapprove

Edit Expense

Edit Reim. Amount

Add Bank Fee

**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.



# INDEX

Approver's Review Tools .....	5	Certify Mobile - Approving/Disapproving .....	27
APPROVING EXPENSE REPORTS .....	4	Disapproving an Expense Report - Approvers .....	24
Approving on Certify Mobile .....	13	Other Actions Menu - Approvers .....	6
Approving/Disapproving Reports .....	19	Sending and Receiving an Inquiry - Approvers .....	9