



NEW USER REGISTRATION

PURPOSE

This document will provide step by step instructions for new users to register and gain access to the CalATERS Global system. Once the user has completed the registration process the user CalATERS Global User ID and password will be activated.

Before you begin, reach out to your [department accounting office](#) and request a CalATERS Profile be established. Every department will have a process on how to request a CalATERS Profile. Once you have complied with your department process, and receive confirmation that a profile has been created, then you can start the registration process.

ASSUMPTIONS

Departments that are using the CalATERS Global system each have their own internal process where the department accounting office will receive a request to load a profile data for an employee/non-employee. Until this information is loaded in CalATERS you cannot register.

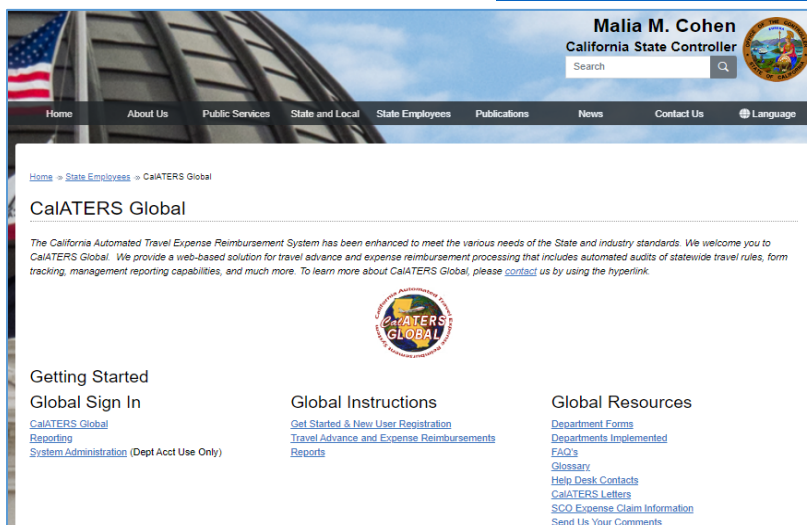
If you were previously loaded at another department, you cannot re-register until your profile has been deleted from your prior department. Contact your prior departments accounting office to be deleted before you can be added to your new department.

TARGET AUDIENCE

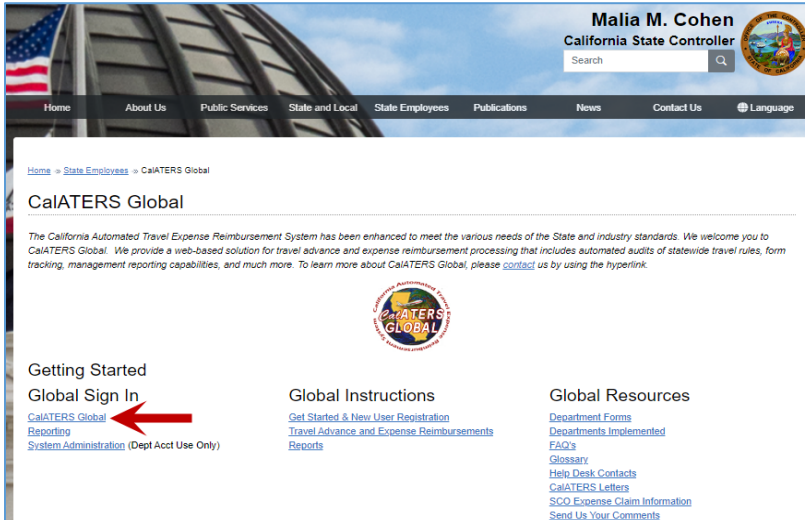
All CalATERS Users

LAUNCH NEW USER REGISTRATION

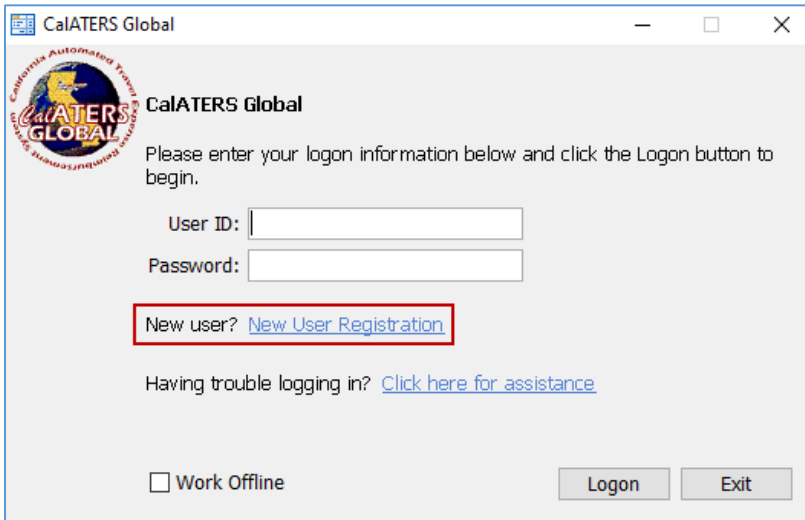
- 1) Go to the CalATERS Global website at https://www.sco.ca.gov/calaters_global.html.



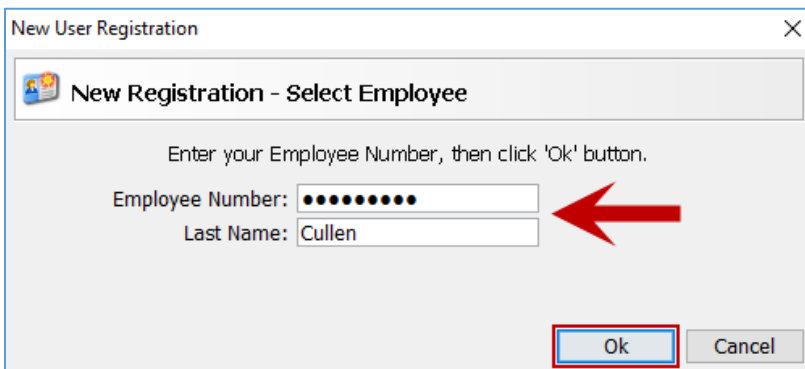
2) Select the **CalATERS Global** link located under the title 'Global Sign In'.



3) After the CalATERS Global Sign In window appears, select the **New User Registration** link.



4) Enter your full **Social Security Number** and **Last name**. Then select the **Ok** button.

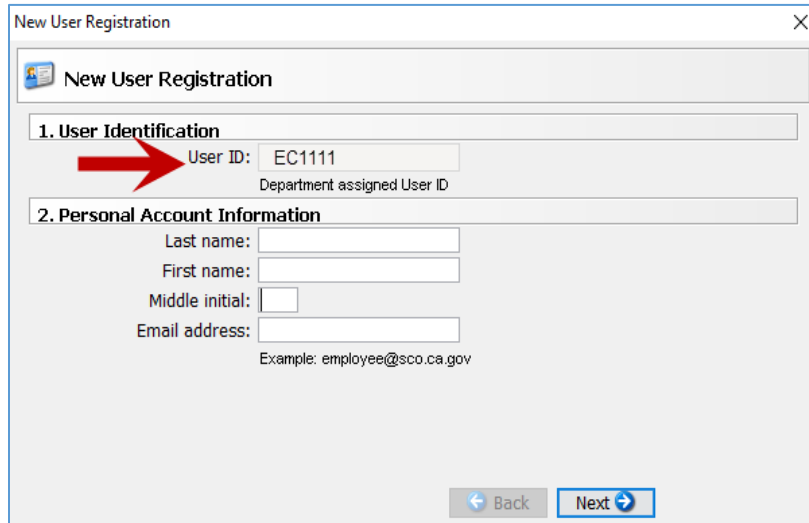


REVIEW AND POPULATION OF PROFILE INFORMATION DURING REGISTRATION

5) User Identification

The User ID created for you is available on the first page of the profile under User Identification. Write down your user ID. This is the only field your user ID is populated. The user will need this user ID to login into CalATERS.

Note: User ID is grayed out and cannot be modified. This was preloaded by your department accounting office.

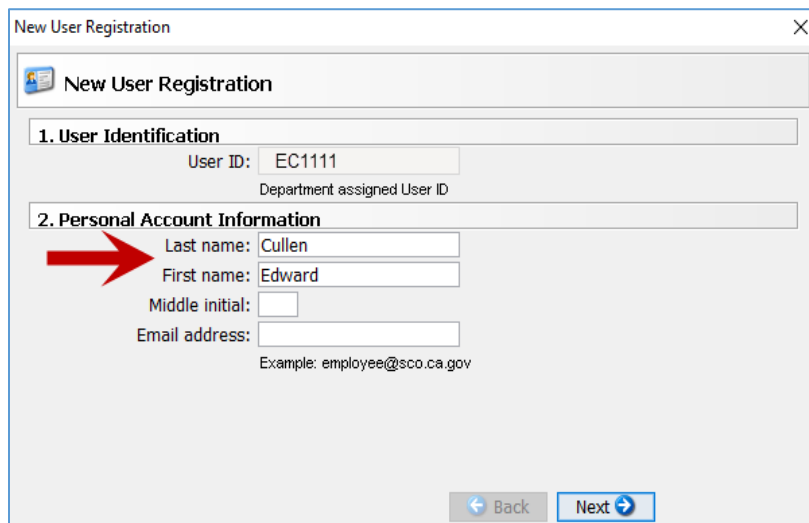


The screenshot shows a web browser window titled "New User Registration". The page has a header "New User Registration" with a small icon. Below the header, there are two main sections: "1. User Identification" and "2. Personal Account Information". In the "1. User Identification" section, there is a text input field for "User ID" containing the value "EC1111". A red arrow points to this field. Below the "User ID" field, it says "Department assigned User ID". The "2. Personal Account Information" section contains fields for "Last name:", "First name:", "Middle initial:", and "Email address:". Below the "Email address:" field, there is an example: "Example: employee@sco.ca.gov". At the bottom of the form, there are two buttons: "Back" and "Next".

6) User Name Fields

Enter your full name as entered into the State Employment History. This includes first, middle and last names (hyphens included). For example: the employee's legal name, posted in State Employment History, is "Joseph Smith". When updating the first name in the CalATERS profile enter "Joseph" not "J" or "Joe".

Note: The name fields are included in Tax reporting to the SCO therefore these values must be completed with a full legal name.



The screenshot shows the same "New User Registration" web browser window. The "1. User Identification" section is still visible with "User ID" set to "EC1111". The "2. Personal Account Information" section is now the focus. A red arrow points to the "Last name:" field, which contains the value "Cullen". The "First name:" field contains "Edward". The "Middle initial:" field is empty. The "Email address:" field is empty. Below the "Email address:" field, there is an example: "Example: employee@sco.ca.gov". At the bottom of the form, there are two buttons: "Back" and "Next".

7) **Email Address**

Enter in your email address. Then select the **Next** button.

Note: The entered email address will be used by the CalATERS System to send the user notifications including your temporary password, once registration is complete. Review and validate the email is entered correctly.

The screenshot shows a 'New User Registration' window with the following fields and values:

- 1. User Identification**
 - User ID: EC1111
 - Department assigned User ID
- 2. Personal Account Information**
 - Last name: Cullen
 - First name: Edward
 - Middle initial:
 - Email address: Edward.Cullen@sco.ca.gc (highlighted with a red arrow)
 - Example: employee@sco.ca.gov

At the bottom, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red box.

8) **Phone Number**

Enter in your business phone number.

Note: The hyphens are prepopulated in the field.

The screenshot shows a 'New User Registration' window with the following fields and values:

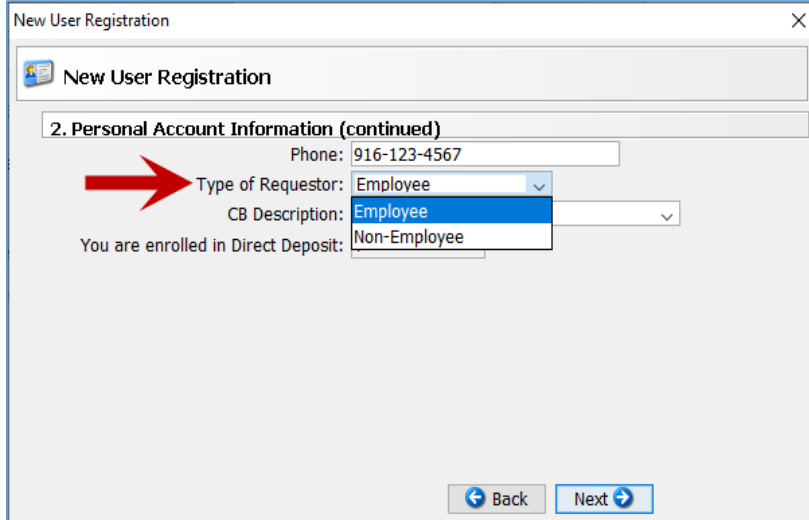
- 2. Personal Account Information (continued)**
 - Phone: 916-123-4567 (highlighted with a red arrow)
 - Type of Requestor: Employee
 - CB Description: << Select >>
 - You are enrolled in Direct Deposit: Y

At the bottom, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red box.

9) **Type of Requestor**

Select the drop-down arrow for the list of requestors to display.

a) **State Employees:** Civil Service State employees will select **Employee**.

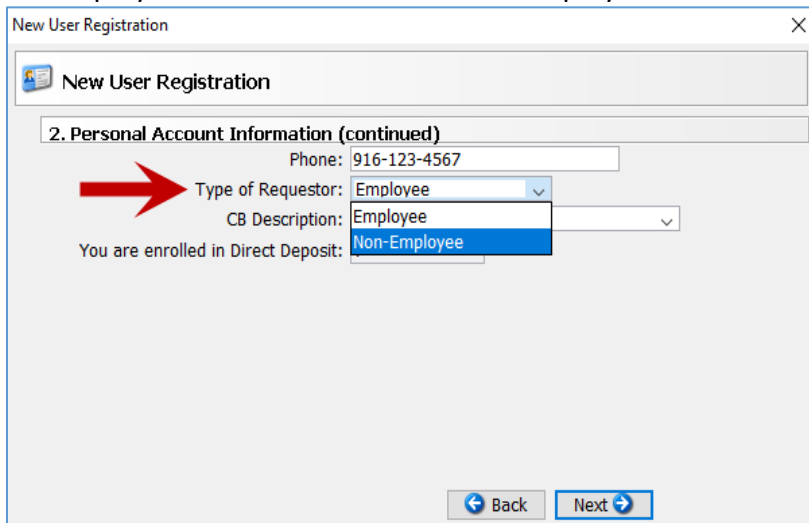


The screenshot shows a 'New User Registration' window with a close button (X) in the top right. Below the title bar is a header area with a document icon and the text 'New User Registration'. The main content area is titled '2. Personal Account Information (continued)'. It contains the following fields:

- Phone: 916-123-4567
- Type of Requestor: Employee (with a dropdown arrow)
- CB Description: Employee (with a dropdown arrow)
- You are enrolled in Direct Deposit: Non-Employee

At the bottom, there are two buttons: 'Back' with a left arrow and 'Next' with a right arrow. A red arrow points to the 'Type of Requestor' dropdown menu.

b) **Non-State Employee:** Employees such as Board Members, consultants, and other non-salaried employees who are not civil service employees will select **Non-Employee**.

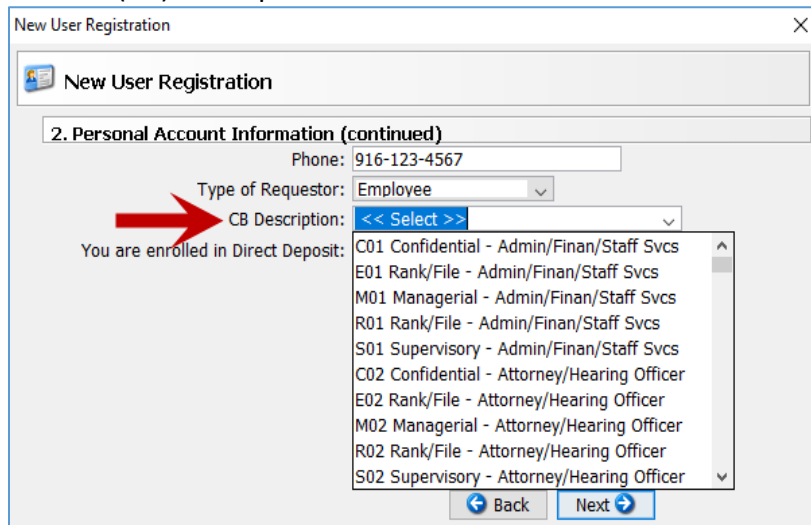


This screenshot is identical to the one above, showing the 'New User Registration' form. The 'Type of Requestor' dropdown menu is highlighted with a blue selection bar, and a red arrow points to it. The other fields and navigation buttons remain the same.

10) **CB Description**

Select the drop-down arrow for the list of collective bargaining units to display.

- a) State Employees: Locate and select which description is applicable to your collective bargaining Unit (CB) Description.



The screenshot shows a 'New User Registration' window with the following fields and values:

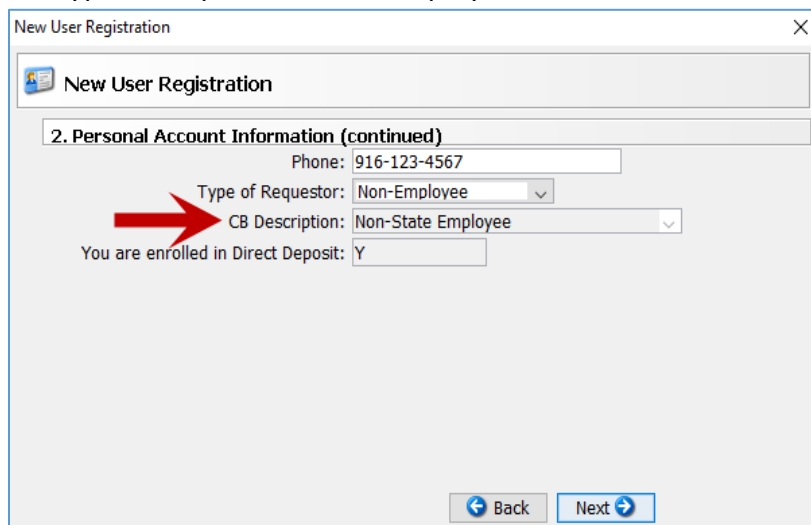
- Phone: 916-123-4567
- Type of Requestor: Employee
- CB Description: << Select >> (with a red arrow pointing to the dropdown arrow)
- You are enrolled in Direct Deposit: (checkbox)

The dropdown menu for CB Description is open, showing a list of options:

- C01 Confidential - Admin/Finan/Staff Svcs
- E01 Rank/File - Admin/Finan/Staff Svcs
- M01 Managerial - Admin/Finan/Staff Svcs
- R01 Rank/File - Admin/Finan/Staff Svcs
- S01 Supervisory - Admin/Finan/Staff Svcs
- C02 Confidential - Attorney/Hearing Officer
- E02 Rank/File - Attorney/Hearing Officer
- M02 Managerial - Attorney/Hearing Officer
- R02 Rank/File - Attorney/Hearing Officer
- S02 Supervisory - Attorney/Hearing Officer

Buttons for 'Back' and 'Next' are visible at the bottom.

- b) Non-State Employees: CB Description will automatically reflect as Non-State Employee when the Type of Requestor = Non-Employee.



The screenshot shows a 'New User Registration' window with the following fields and values:

- Phone: 916-123-4567
- Type of Requestor: Non-Employee
- CB Description: Non-State Employee (with a red arrow pointing to the dropdown arrow)
- You are enrolled in Direct Deposit: Y

Buttons for 'Back' and 'Next' are visible at the bottom.

11) You Are Enrolled In Direct Deposit

Direct Deposit will be auto filled with a Y (YES) or N (No) based on how you receive your salary. If you are enrolled in direct deposit, you will receive your reimbursements via electronic fund transfer (EFT). If you are not enrolled in direct deposit, you will be issued a physical warrant sent to the mailing address provided on your CalATERS profile. Non-state employees will always default to “no” since they are not paid by the state. Then select the **Next** button.

Note: Direct Deposit is grayed out and cannot be modified.

New User Registration

New User Registration

2. Personal Account Information (continued)

Phone: 916-123-4567

Type of Requestor: Employee

CB Description: E01 Rank/File - Admin/Finan/Staff Svcs

You are enrolled in Direct Deposit: Y

Back Next

12) Mailing Address

a) Enter your mailing address. The mailing address is used to send warrants to users that are not enrolled on direct deposit. Invalid addresses and punctuation could result in delayed delivery of a warrant payment.

For example: 1234 Capitol Mall, Sacramento CA 95814.

New User Registration

New User Registration

Mailing Address:

Street: 1234 Capitol Mall City: Sacramento

State: CA Zip Code: 95814-

Is your residence address same as mailing address? Yes

Back Next

- b) If your residence address is the same as mailing address, select the drop-down arrow to select **Yes**. Then select the **Next** button.

New User Registration

Mailing Address:

Street: 1234 Capitol Mall City: Sacramento

State: CA Zip Code: 95814-

Is your residence address same as mailing address? Yes Yes No

Back Next

- c) If mailing address is different from residence address, select the drop-down arrow to select **No**. Residence address can be used for the accounting office to calculate Personal Auto Mileage on travel claims.

New User Registration

Mailing Address:

Street: 1234 Capitol Mall City: Sacramento

State: CA Zip Code: 95814-

Is your residence address same as mailing address? Yes Yes No

Back Next

13) Residence Address

- a) If the residence address is on file with the accounting office, select the drop-down arrow to select **Yes**. Then select the **Next** button.

Note: Employee/non-employees who do not want to disclose their address due to safety/personal issues are not required to provide a residential address if the address is on file at with the accounting office. Ensure this address on file is kept current. Department accounting office use this address to calculate Personal Auto Mileage.

New User Registration

Mailing Address:

Street: 1234 Capitol Mall City: Sacramento
State: CA Zip Code: 95814-
Is your residence address same as mailing address? No

Residence Address:

My residence address is on file with the Accounting Office Yes

Yes
No

Back Next

- b) If the residence address is not on file with the accounting office, select the drop-down arrow to select **No**.

New User Registration

Mailing Address:

Street: 1234 Capitol Mall City: Sacramento
State: CA Zip Code: 95814-
Is your residence address same as mailing address? No

Residence Address:

My residence address is on file with the Accounting Office Yes

Yes
No

Back Next

c) If you selected No, enter in your residence address. Then select the **Next** button.

New User Registration

Mailing Address:

Street: 1234 Capitol Mall City: Sacramento
State: CA Zip Code: 95814-
Is your residence address same as mailing address? No

Residence Address:

My residence address is on file with the Accounting Office No
Street: 321 Walk Front Way City: Sacramento
State: CA Zip Code: 95811-

Back Next

14) Default Approver

a) Select the **Change Default Approver** button to add your approver.

Note: An approver is a user within CalATERS Global in a supervisory or management position authorized to approve travel advance and/or expense reimbursement forms for their employee/non-employees. Select your first line supervisor/manager.

New User Registration

Organization

Dept Name: 0840. State Controller's
Division Name: *
Bureau Name:
Unit Code:
Approver: Change Default Approver
Work Street:
Work City:
Work State: Work Zip Code: -

Back Next

b) Enter the approver's Last name. Then select the **Look Up** button.

Select Person

Select Person

Enter last name, or first few letters, then click 'Look Up' button.
Optionally, enter the first name to narrow search.

Last name: Williams

First name:

Look Up

Name	Email
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Ok Cancel

c) Select **approver** by highlighting the name. Then select the **Ok** button.

Note: Only approvers that have registered in CalATERS Global will populate on the list. If you are unable to locate your approver, it could be that they have not registered or will need to be added as a approver. Contact your supervisor/manager.

Select Person

Select Person

Enter last name, or first few letters, then click 'Look Up' button.
Optionally, enter the first name to narrow search.

Last name: Williams

First name:

Look Up

Name	Email
Williams, Crystal	Crystal.Williams@sco.ca.gov

Ok Cancel

15) **Work Address**

Enter in the address of your physical work location. Then select the **Next** button.

The screenshot shows the 'New User Registration' window with the 'Organization' tab selected. The form contains the following fields and controls:

- Dept Name: 0840. State Controller's
- Division Name: *
- Bureau Name:
- Unit Code:
- Approver: Crystal Williams (with a 'Change Default Approver' button next to it)
- Work Street: 100 Capitol Mall
- Work City: Sacramento
- Work State: CA
- Work Zip Code: 95811-

At the bottom, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red box, and a red arrow points to the 'Approver' field.

16) **Account Coding Information**

The account coding information is used to identify the department appropriations. The user doesn't enter data on this screen. Select the **Next** button.

Note: The account coding information is grayed out and cannot be modified. This was preloaded by your department accounting office.

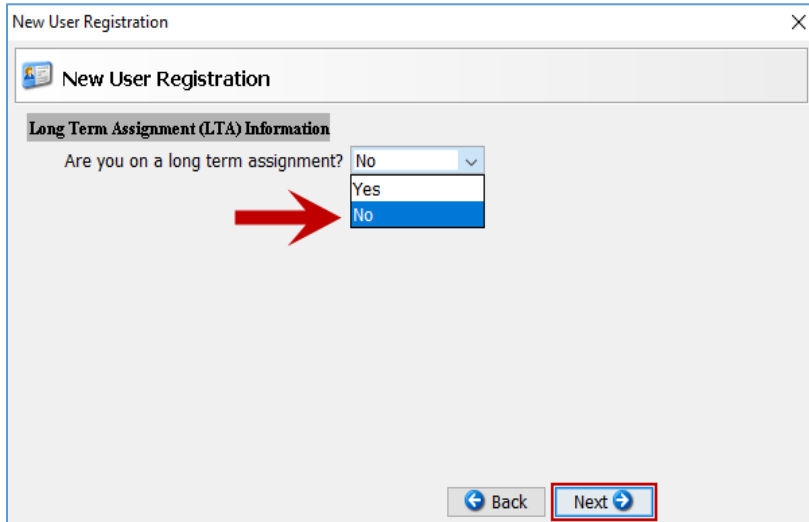
The screenshot shows the 'New User Registration' window with the 'Account Coding Information' tab selected. The form contains the following fields and controls:

- Fund Number: 0044
- Sub-Fund Number:
- Fed Catalog:
- Organization Number: 0840
- Year of Statute: 2023
- Element:
- Reference Number: 001
- Chapter: 12
- Component:
- Program/Category: 99/
- Detailed Coding: 2023 2565 96501
- Task:
- Prime Account: 0000
- Sub Account Code:
- Source:

At the bottom, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red box.

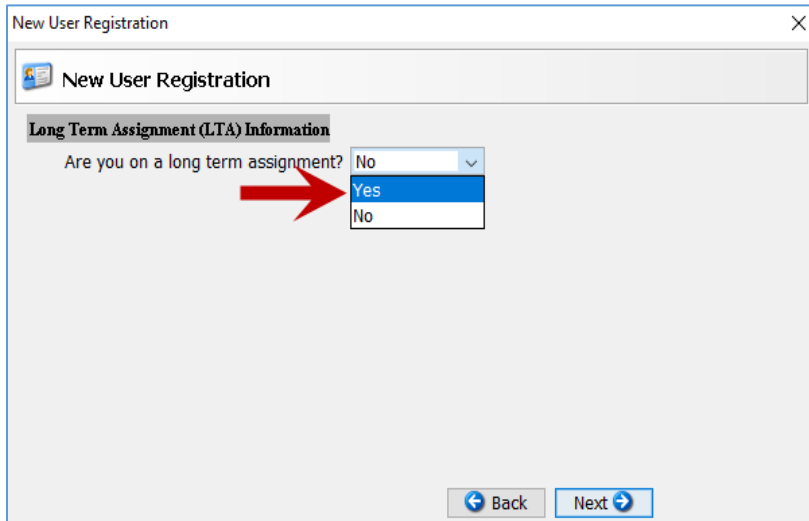
17) Long Term Assignment (LTA) Information

a) LTA is a pre-approved business trip of more than 30 days. If you are not on a LTA, select the drop-down button and select **No**. Then select the **Next** button.



The screenshot shows a window titled "New User Registration" with a close button (X) in the top right corner. Below the title bar is a header area with a user icon and the text "New User Registration". The main content area is titled "Long Term Assignment (LTA) Information". It contains the question "Are you on a long term assignment?" followed by a dropdown menu. The dropdown menu is open, showing three options: "No", "Yes", and "No". A red arrow points to the first "No" option. At the bottom of the form, there are two buttons: "Back" with a left arrow and "Next" with a right arrow. The "Next" button is highlighted with a red rectangular box.

b) If you are on a LTA, select the drop-down button and select **Yes**.



The screenshot shows a window titled "New User Registration" with a close button (X) in the top right corner. Below the title bar is a header area with a user icon and the text "New User Registration". The main content area is titled "Long Term Assignment (LTA) Information". It contains the question "Are you on a long term assignment?" followed by a dropdown menu. The dropdown menu is open, showing three options: "No", "Yes", and "No". A red arrow points to the "Yes" option. At the bottom of the form, there are two buttons: "Back" with a left arrow and "Next" with a right arrow.

c) Enter in the **Start and End Dates** of your LTA.

New User Registration

New User Registration

Long Term Assignment (LTA) Information

Are you on a long term assignment? Yes

Start Date: 07/01/23 End Date: 07/31/23

LTA Residence address: **Permanent address:**

Street: Street:

City: City:

State: Zip Code: - State: Zip Code: -

Back Next

d) Enter in the LTA **residence address** where your LTA was located at, and the permanent address is where your resident address is when not on LTA. Select the **Next** button.

New User Registration

New User Registration

Long Term Assignment (LTA) Information

Are you on a long term assignment? Yes

Start Date: 07/01/23 End Date: 07/31/23

LTA Residence address: **Permanent address:**

Street: 900 Small Street Way Street: 321 Walk Front Way

City: Los Angeles City: Sacramento

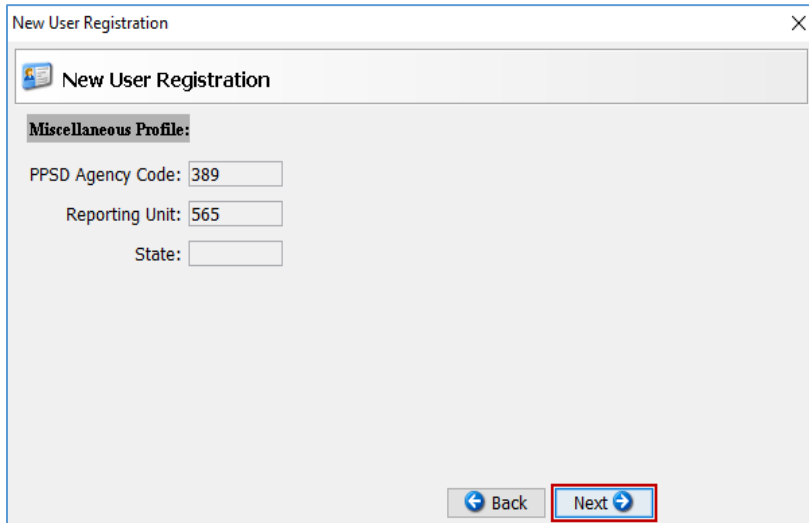
State: CA Zip Code: 95777- State: CA Zip Code: 95811-

Back Next

18) **Miscellaneous Profile**

- a) **State Employees:** The PPSD Agency Code, Reporting Unit and State fields identify the employing agency/department payroll data. The PPSD Agency Code identifies the employee department. The Reporting Unit identifies the employee location/reporting station at their department. The State identifies the state of the employee assigned work location. If blank, CalATERS Global will default to California. The user doesn't enter data on this screen. Select the **Next** button.

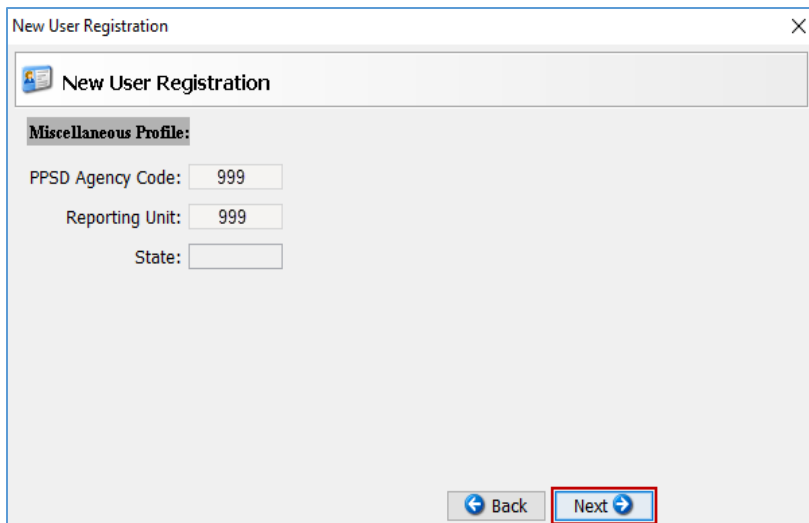
Note: The miscellaneous profile is grayed out and cannot be modified. This was preloaded by your department accounting office.



The screenshot shows a 'New User Registration' window with a title bar containing a close button. Below the title bar is a header area with a document icon and the text 'New User Registration'. The main content area is titled 'Miscellaneous Profile:' and contains three input fields: 'PPSD Agency Code:' with the value '389', 'Reporting Unit:' with the value '565', and 'State:' which is empty. At the bottom of the window are two buttons: 'Back' with a left arrow and 'Next' with a right arrow. The 'Next' button is highlighted with a red rectangular box.

- b) **Non-State Employees:** The PPSD Agency Code and Reporting Unit will be 999/999 for non-state employees. The user doesn't enter data on this screen. Select the **Next** button.

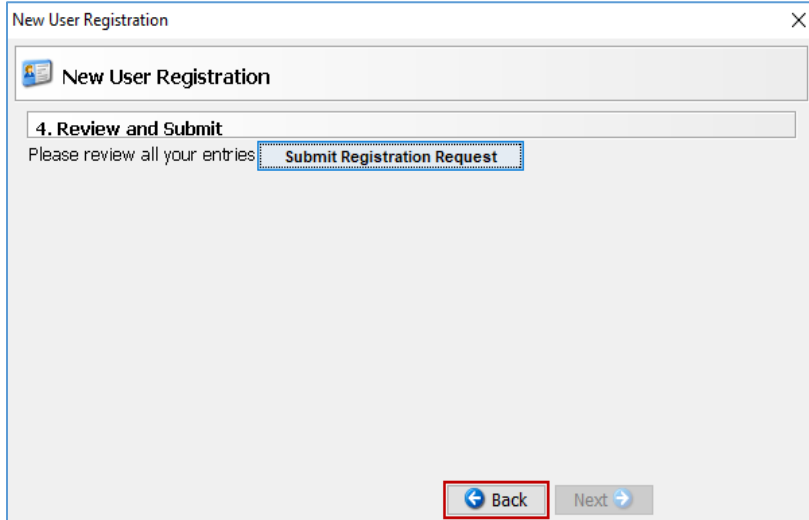
Note: The miscellaneous profile is grayed out and cannot be modified. This was preloaded by your department accounting office.



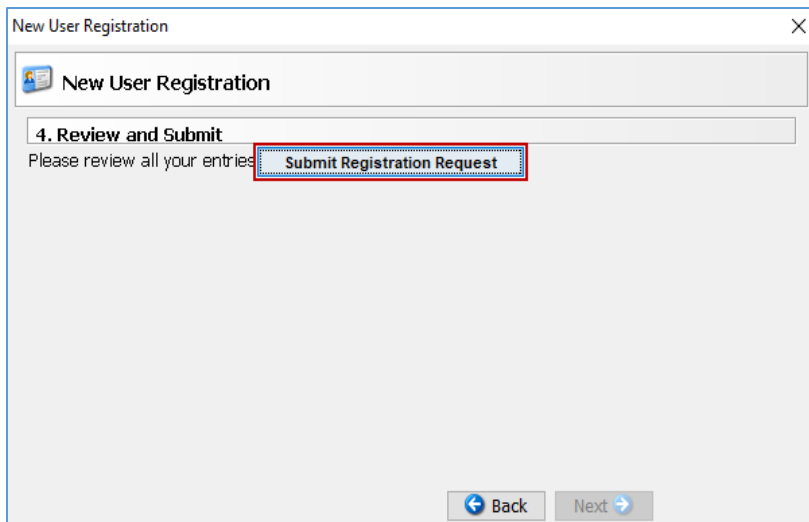
The screenshot shows a 'New User Registration' window with a title bar containing a close button. Below the title bar is a header area with a document icon and the text 'New User Registration'. The main content area is titled 'Miscellaneous Profile:' and contains three input fields: 'PPSD Agency Code:' with the value '999', 'Reporting Unit:' with the value '999', and 'State:' which is empty. At the bottom of the window are two buttons: 'Back' with a left arrow and 'Next' with a right arrow. The 'Next' button is highlighted with a red rectangular box.

19) **Review and Submit**

- a) Review the data entered during the registration process. If any changes/updates are needed, select the **Back** button to go back to make the appropriate changes/updates.



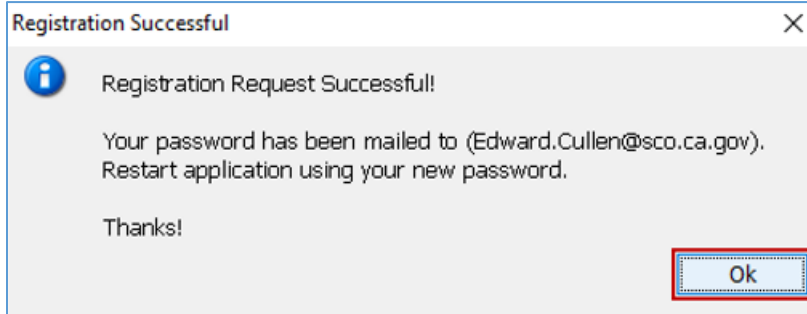
- b) If no changes/updates are needed, proceed to select the **Submit Registration Request** button to complete registration.



20) Registration Successful

Once your registration is complete, a message will display (refer to screen shot below). Your CalATERS Global system-assigned password will be sent to the e-mail address you entered in your profile. Select the **Ok** button to exit.

Note: Validate the email on this message window. If the email is incorrect, you will not receive a Successful Registration Email that provides a temporary password to log in. You will need to contact your [department accounting office](#) for assistance on retrieving your temporary password.



21) Successful Registration Email

A system generated email will be sent with a temporary password.

Note: Refer to the User ID you wrote down earlier (step 5, located on page 3) in the registration process to sign in.

