



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.

CalATERS Global



We welcome you to CalATERS Global, a web-based solution for travel advance and expense reimbursement processing.

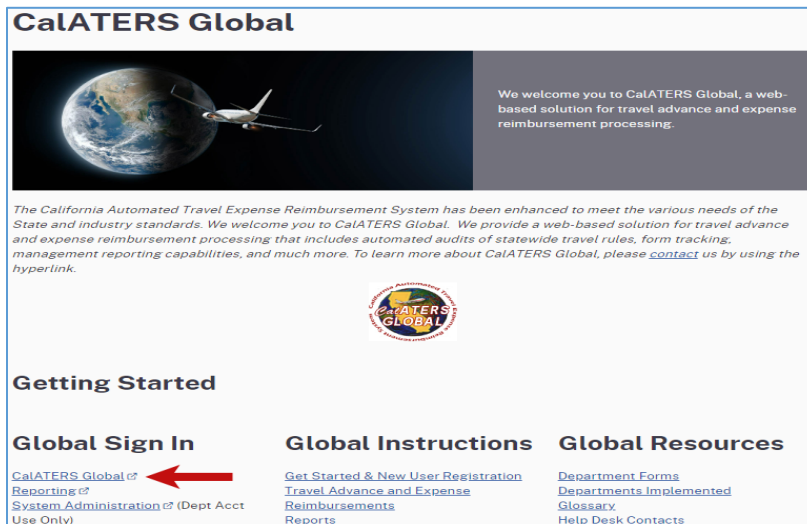
The California Automated Travel Expense Reimbursement System has been enhanced to meet the various needs of the State and industry standards. We welcome you to CalATERS Global. We provide a web-based solution for travel advance and expense reimbursement processing that includes automated audits of statewide travel rules, form tracking, management reporting capabilities, and much more. To learn more about CalATERS Global, please [contact](#) us by using the hyperlink.



Getting Started

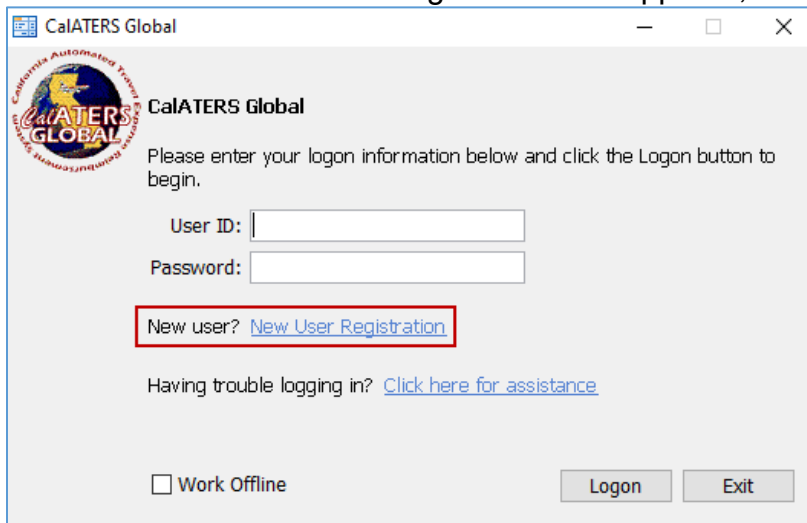
Global Sign In	Global Instructions	Global Resources
CalATERS Global ^o Reporting ^o System Administration ^o (Dept Acct Use Only)	Get Started & New User Registration Travel Advance and Expense Reimbursements Reports	Department Forms Departments Implemented Glossary Help Desk Contacts

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



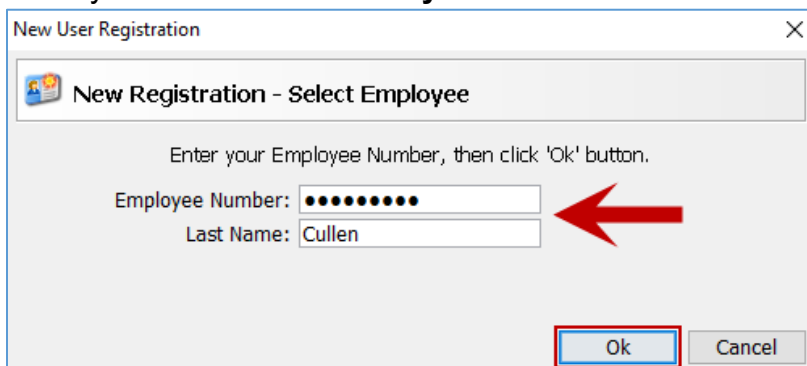
The screenshot shows the CalATERS Global homepage. At the top, there's a header with the title 'CalATERS Global' and a welcome message. Below this, there's a section titled 'Getting Started' with three main links: 'Global Sign In', 'Global Instructions', and 'Global Resources'. Under 'Global Sign In', there are several sub-links, including 'CalATERS Global', 'Reporting', 'System Administration', and 'Use Only'. A red arrow points to the 'CalATERS Global' link.

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



The screenshot shows the CalATERS Global Sign In window. It has a title bar 'CalATERS Global' and a logo. The main content area says 'Please enter your logon information below and click the Logon button to begin.' There are input fields for 'User ID' and 'Password'. Below these, there's a link 'New user? New User Registration' which is highlighted with a red box. At the bottom, there's a 'Logon' button and an 'Exit' button.

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



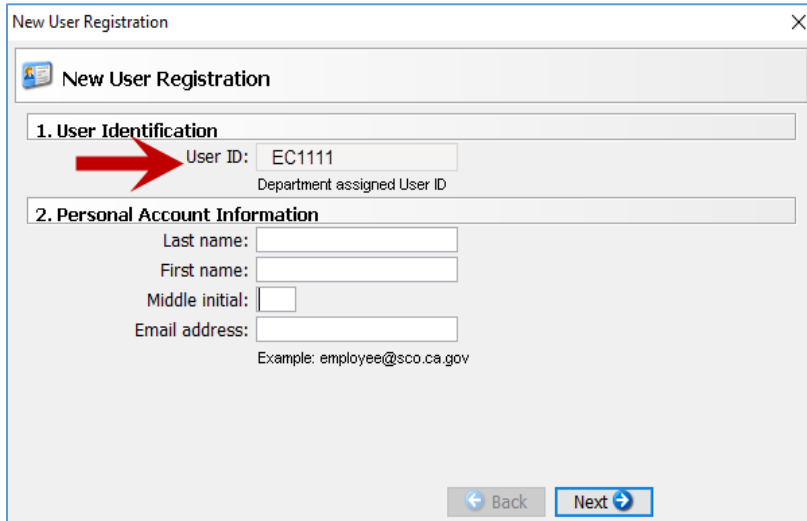
The screenshot shows the 'New User Registration' window. It has a title bar 'New User Registration' and a subtitle 'New Registration - Select Employee'. The main content area says 'Enter your Employee Number, then click 'Ok' button.' There are input fields for 'Employee Number' and 'Last Name'. The 'Employee Number' field is highlighted with a red box and a red arrow points to it. The 'Last Name' field contains the text 'Cullen'. At the bottom, there are 'Ok' and 'Cancel' buttons, with the 'Ok' button highlighted by a red box.

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.

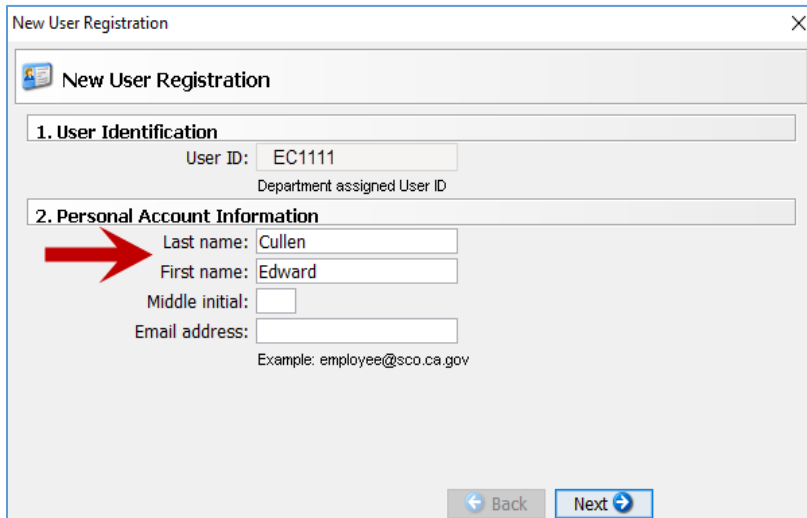


The screenshot shows the 'New User Registration' window. The '1. User Identification' section has a 'User ID' field with the value 'EC1111', which is grayed out. A red arrow points to this field. Below it is the label 'Department assigned User ID'. The '2. Personal Account Information' section has fields for 'Last name:', 'First name:', 'Middle initial:', and 'Email address:'. An example email address 'employee@sco.ca.gov' is shown. At the bottom are 'Back' and 'Next' buttons.

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 'New User Registration' window. The '2. Personal Account Information' section has fields for 'Last name:', 'First name:', 'Middle initial:', and 'Email address:'. The 'Last name' field contains 'Cullen' and the 'First name' field contains 'Edward'. A red arrow points to the 'Last name' field. Below the fields is the example email address 'employee@sco.ca.gov'. At the bottom are 'Back' and 'Next' buttons.

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.

New User Registration

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
Example: employee@sco.ca.gov

Back Next

8) **Phone Number**

Enter in your business phone number.

Note: The hyphens are prepopulated in the field.

New User Registration

2. Personal Account Information (continued)

Phone: 916-123-4567
Type of Requestor: Employee
CB Description: << Select >>
You are enrolled in Direct Deposit: Y

Back Next

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**.

New User Registration

New User Registration

2. Personal Account Information (continued)

Phone: 916-123-4567

Type of Requestor: Employee

CB Description: Employee

You are enrolled in Direct Deposit: Non-Employee

Back Next

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**.

New User Registration

New User Registration

2. Personal Account Information (continued)

Phone: 916-123-4567

Type of Requestor: Employee

CB Description: Non-Employee

You are enrolled in Direct Deposit: Non-Employee

Back Next

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.

New User Registration

New User Registration

2. Personal Account Information (continued)

Phone: 916-123-4567

Type of Requestor: Employee

CB Description: << Select >>

You are enrolled in Direct Deposit:

Back Next

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

New User Registration

New User Registration

2. Personal Account Information (continued)

Phone: 916-123-4567

Type of Requestor: Non-Employee

CB Description: Non-State Employee

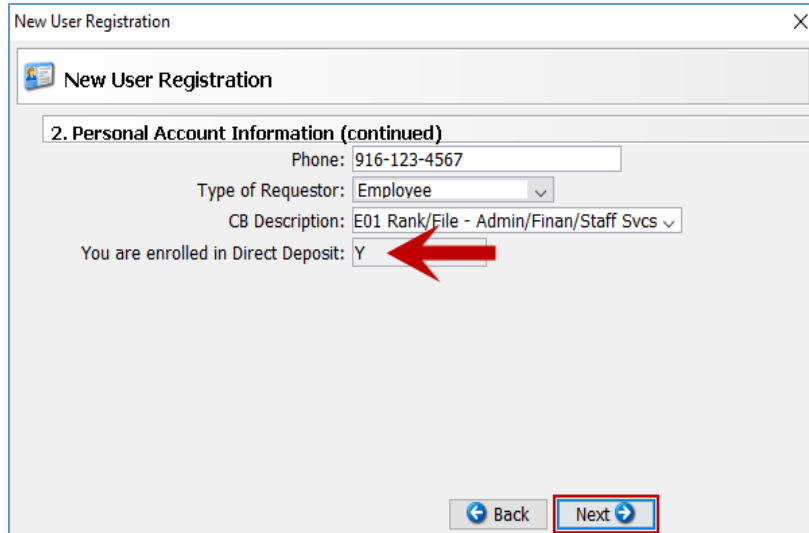
You are enrolled in Direct Deposit: Y

Back Next

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

2. Personal Account Information (continued)

Phone: 916-123-4567

Type of Requestor: Employee

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

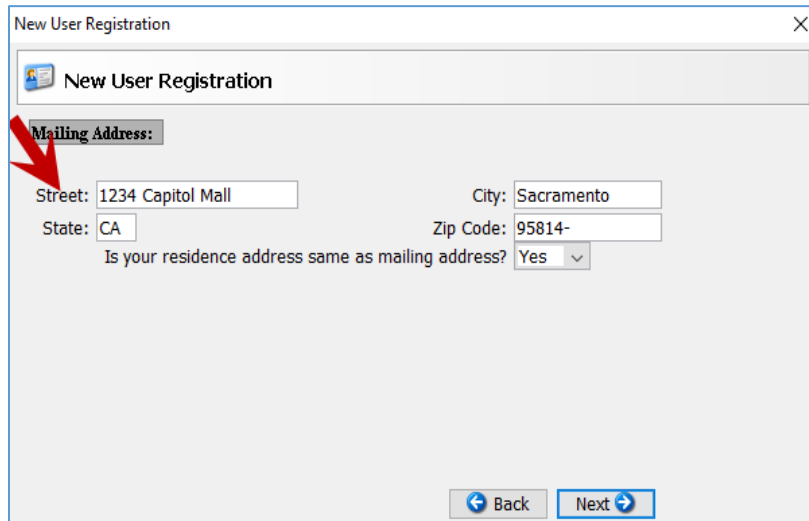
You are enrolled in Direct Deposit: Y

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

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-

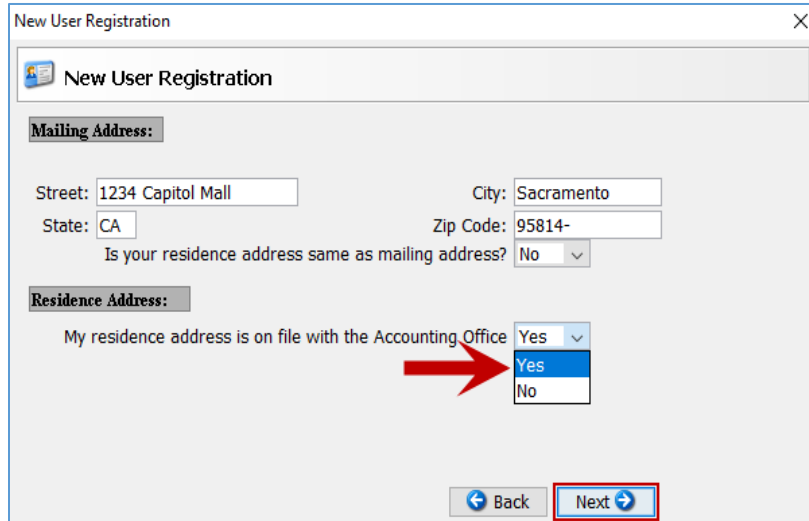
Is your residence address same as mailing address? Yes Yes No

Back Next

13) Residence Address

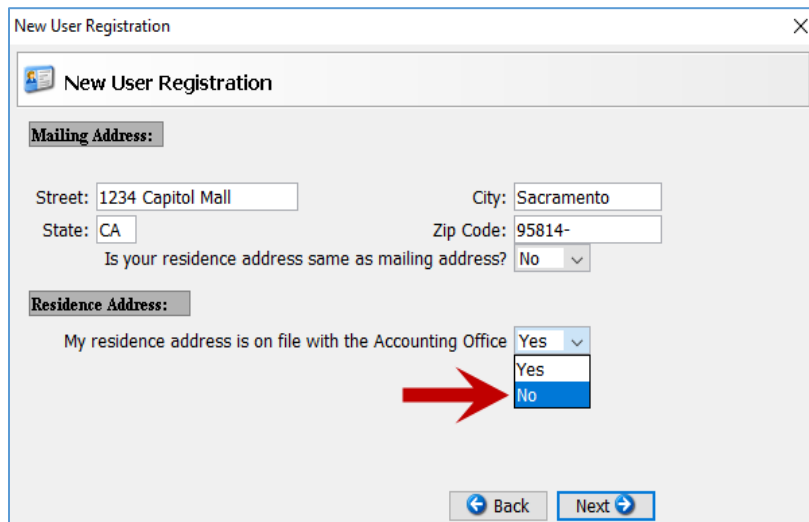
- a) If the residence address is on file with the accounting office, select the drop-down arrow to select **Yes**. Then select the **Next** button.

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.



The screenshot shows the 'New User Registration' window. Under the 'Mailing Address' section, the Street is '1234 Capitol Mall', City is 'Sacramento', State is 'CA', and Zip Code is '95814-'. A dropdown menu for 'Is your residence address same as mailing address?' is set to 'No'. Under the 'Residence Address' section, the text 'My residence address is on file with the Accounting Office' is followed by a dropdown menu. A red arrow points to the 'Yes' option in this dropdown. At the bottom, there are 'Back' and 'Next' buttons, with the 'Next' button highlighted by a red box.

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



This screenshot is identical to the one above, but the red arrow points to the 'No' option in the 'Residence Address' dropdown menu. The 'Next' button remains highlighted with a red box.

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

The screenshot shows the 'New User Registration' window. The 'Mailing Address' section is filled with: Street: 1234 Capitol Mall, City: Sacramento, State: CA, Zip Code: 95814-. Below this is a checkbox 'Is your residence address same as mailing address?' with 'No' selected. The 'Residence Address' section is highlighted with a red arrow. It contains: 'My residence address is on file with the Accounting Office' with 'No' selected, Street: 321 Walk Front Way, City: Sacramento, State: CA, Zip Code: 95811-. At the bottom, the 'Next' button is highlighted with a red box, and the 'Back' button is also visible.

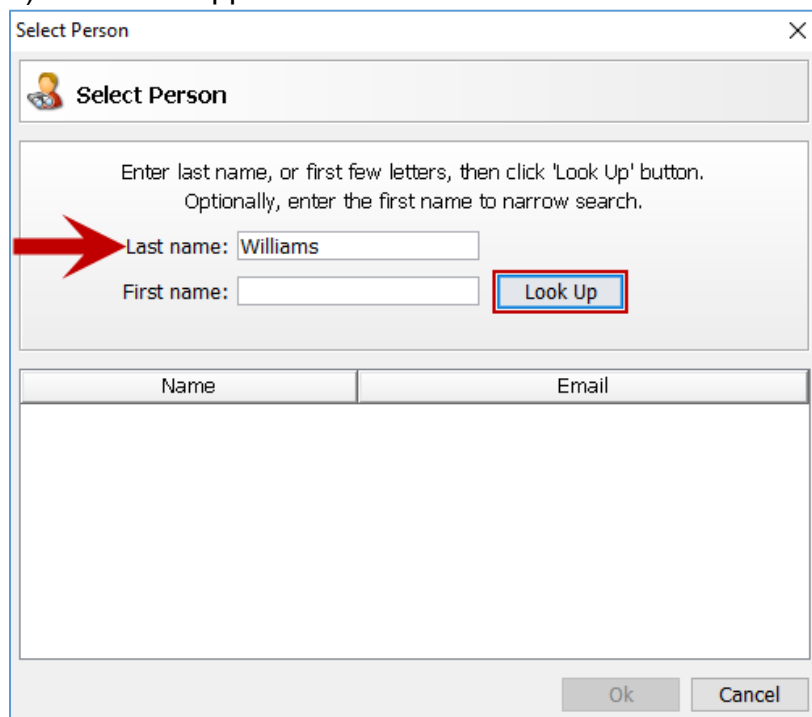
14) **Default Approver**

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.

The screenshot shows the 'New User Registration' window with the 'Organization' section. Fields include: Dept Name: 0840. State Controller's, Division Name: *, Bureau Name: (empty), Unit Code: (empty), Approver: (empty), Work Street: (empty), Work City: (empty), Work State: (empty), and Work Zip Code: -. The 'Change Default Approver' button is highlighted with a red box. At the bottom, the 'Next' button is highlighted with a blue box, and the 'Back' button is also visible.

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



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:

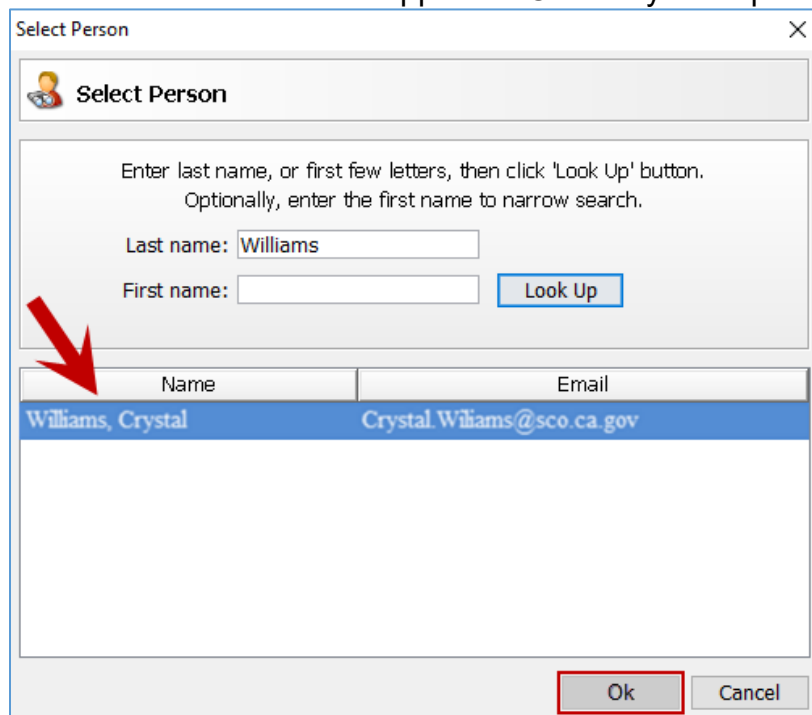
Look Up

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

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:

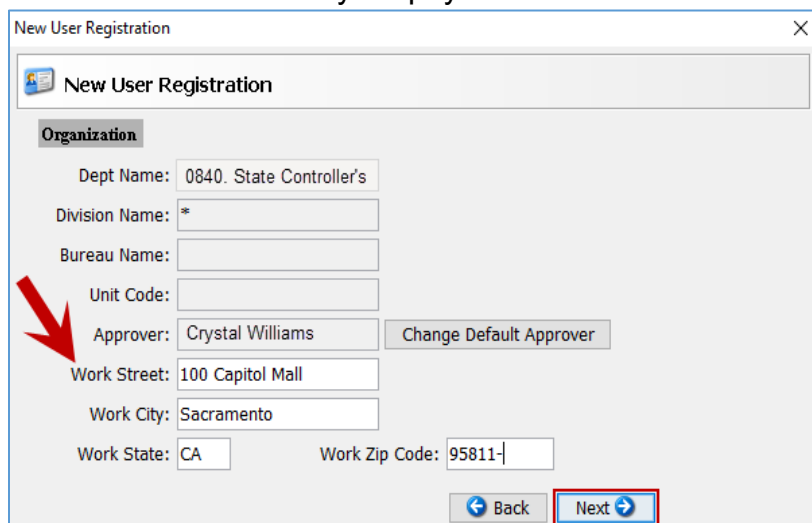
Look Up

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.



New User Registration

Organization

Dept Name: 0840. State Controller's

Division Name: *

Bureau Name:

Unit Code:

Approver: Crystal Williams Change Default Approver

Work Street: 100 Capitol Mall

Work City: Sacramento

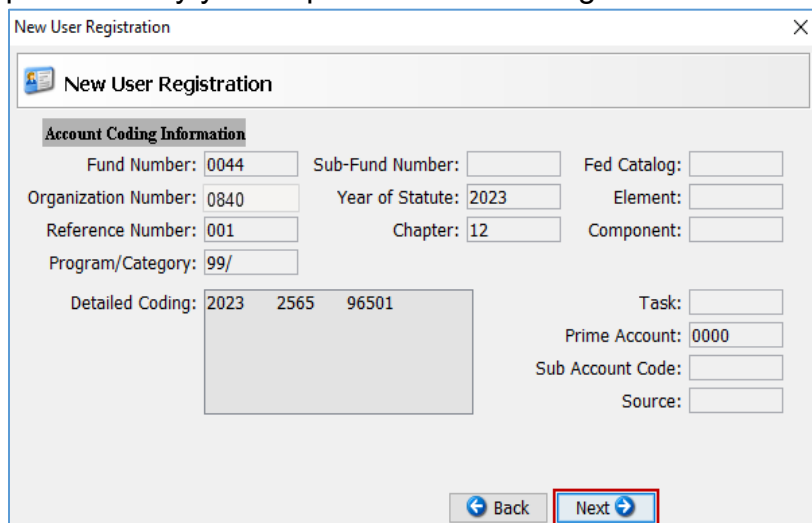
Work State: CA Work Zip Code: 95811-

Back Next

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.



New User Registration

Account Coding Information

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

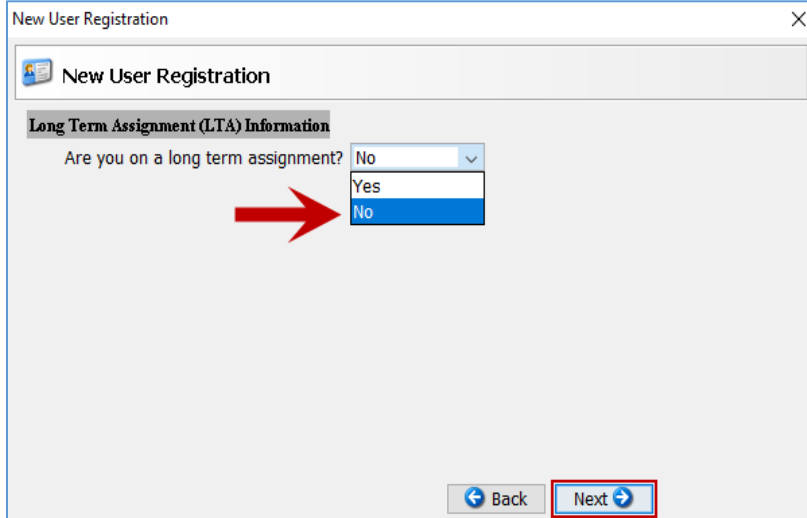
Sub Account Code:

Source:

Back Next

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.



New User Registration

New User Registration

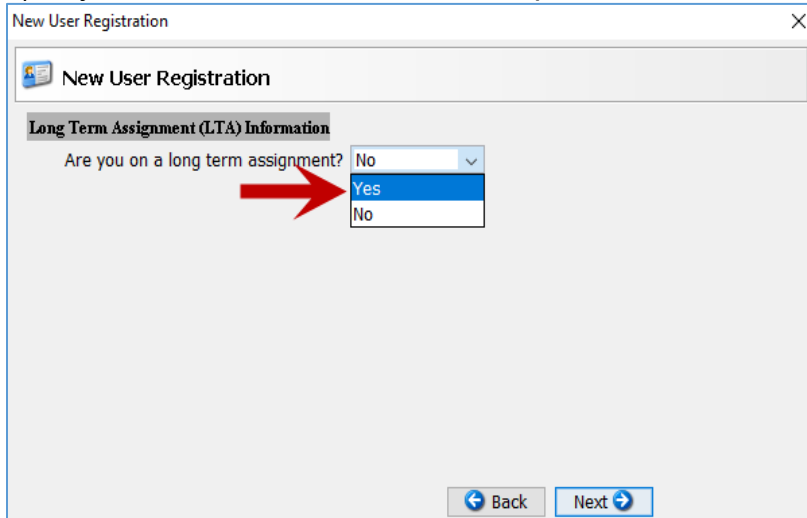
Long Term Assignment (LTA) Information

Are you on a long term assignment?

No
Yes
No

Back Next

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



New User Registration

New User Registration

Long Term Assignment (LTA) Information

Are you on a long term assignment?

No
Yes
No

Back Next

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

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:

Street: City: State: Zip Code: -

Permanent address:

Street: City: 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

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:

Street: 900 Small Street Way City: Los Angeles State: CA Zip Code: 95777-

Permanent address:

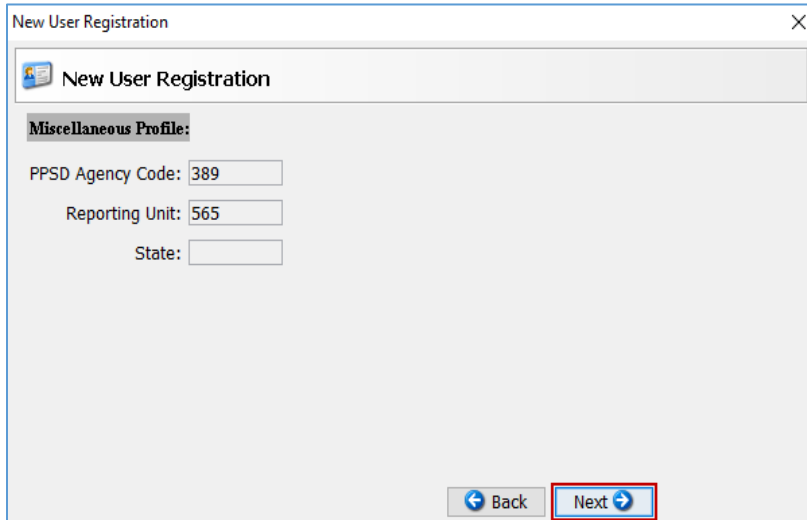
Street: 321 Walk Front Way City: Sacramento State: CA Zip Code: 95811-

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.



New User Registration

New User Registration

Miscellaneous Profile:

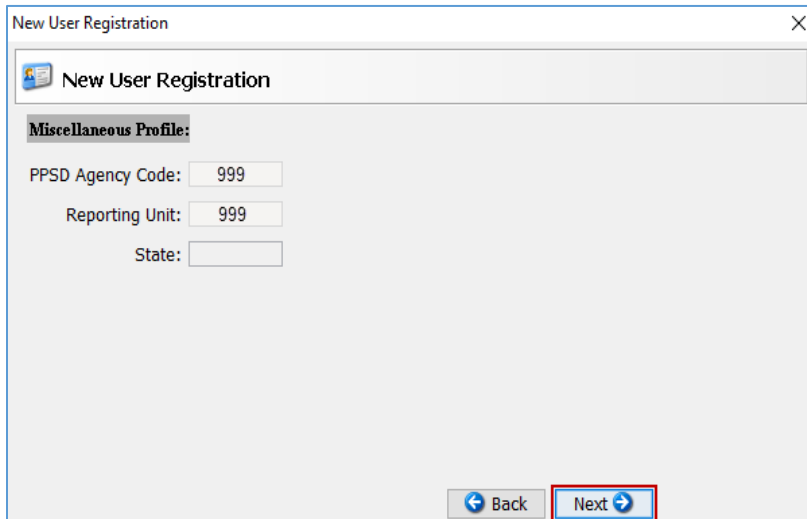
PPSD Agency Code: 389

Reporting Unit: 565

State:

Back Next

- 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.



New User Registration

New User Registration

Miscellaneous Profile:

PPSD Agency Code: 999

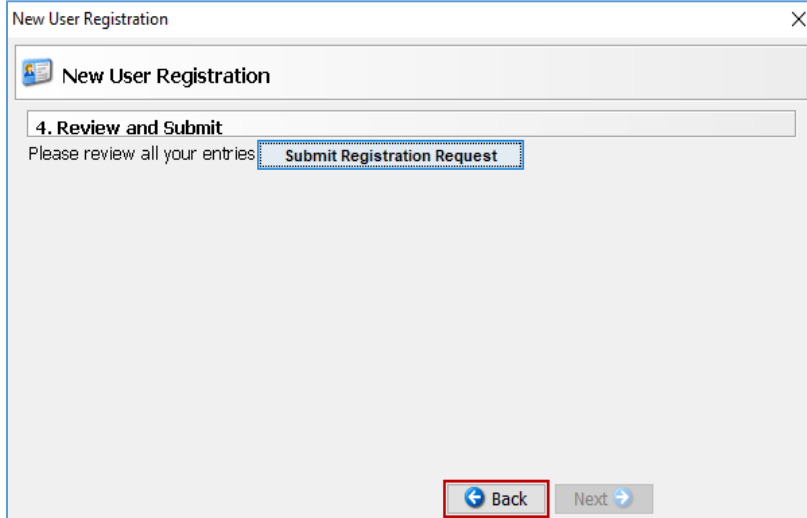
Reporting Unit: 999

State:

Back Next

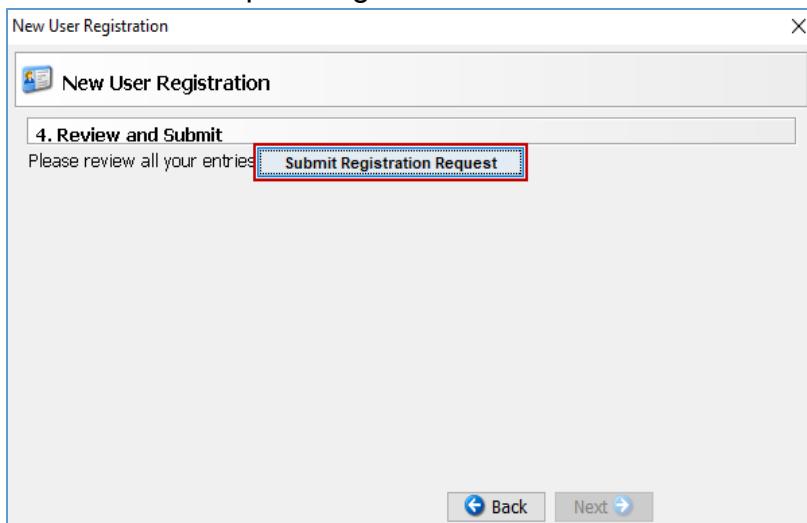
19) Review and Submit

- 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.



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 small icon and the text "New User Registration". The main content area is titled "4. Review and Submit" and contains the text "Please review all your entries". A button labeled "Submit Registration Request" is highlighted with a red box. At the bottom of the window, there are two buttons: "Back" (with a left arrow icon) and "Next" (with a right arrow icon). The "Back" button is also highlighted with a red box.

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

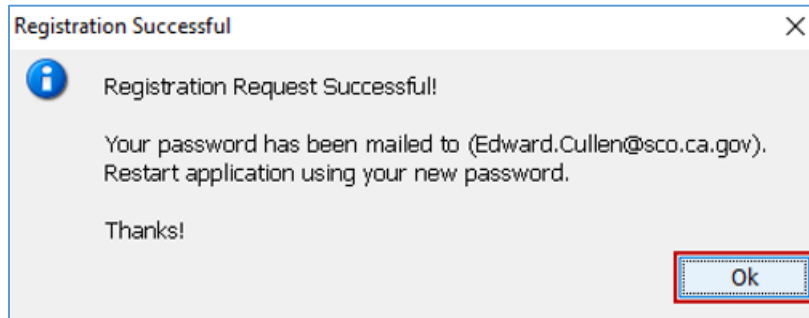


This screenshot is identical to the one above, showing the "New User Registration" window at the "4. Review and Submit" step. The "Submit Registration Request" button and the "Back" button at the bottom are both highlighted with red boxes.

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.

