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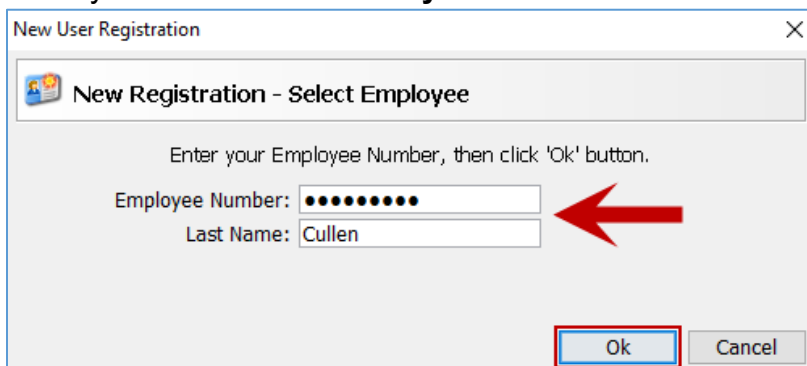
3) After the CalATERS Global Sign In window appears, select the **New User Registration** link.

4) Enter your full **Social Security Number** and **Last name**. Then select the **Ok** button.
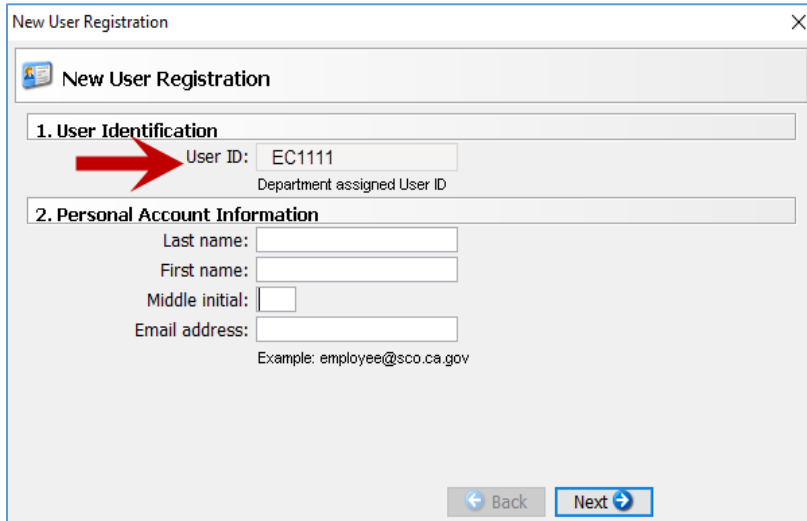
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REVIEW AND POPULATION OF PROFILE INFORMATION DURING REGISTRATION

5) **User Identification**

The User ID created for you is available on the first page of the profile under User Identification. <u>Write down your user ID</u>. 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.
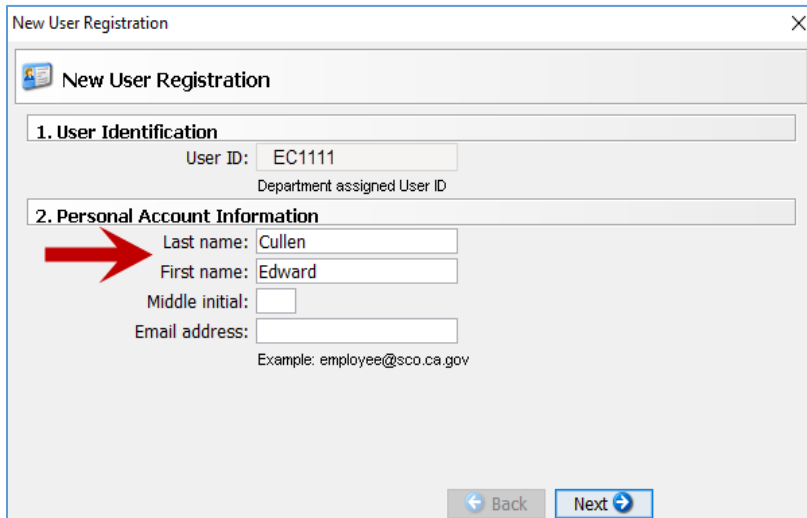

6) **User Name Fields**

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.

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.

8) **Phone Number**
Enter in your business phone number.
Note: The hyphens are prepopulated in the field.

9) **Type of Requestor**
   Select the drop-down arrow for the list of requestors to display.
   a) <u>State Employees</u>: Civil Service State employees will select **Employee**.

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

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10) **CB Description**

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

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

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

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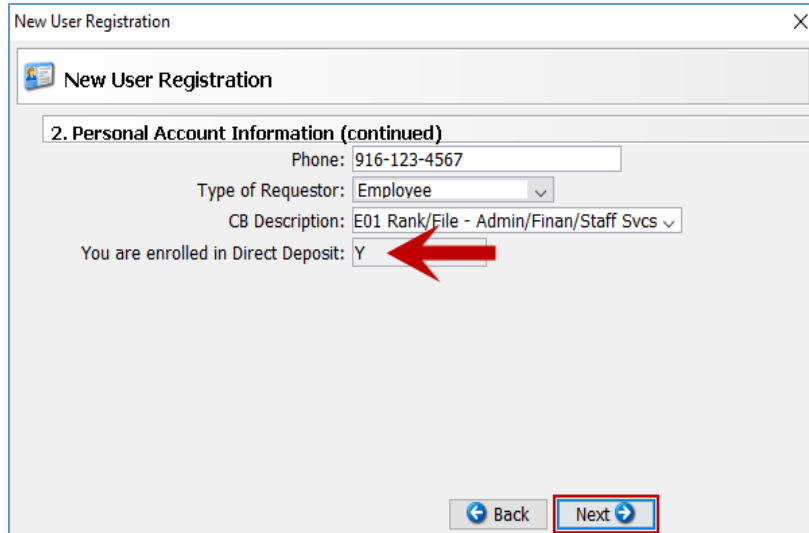
11) **You Are Enrolled In Direct Deposit**

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.
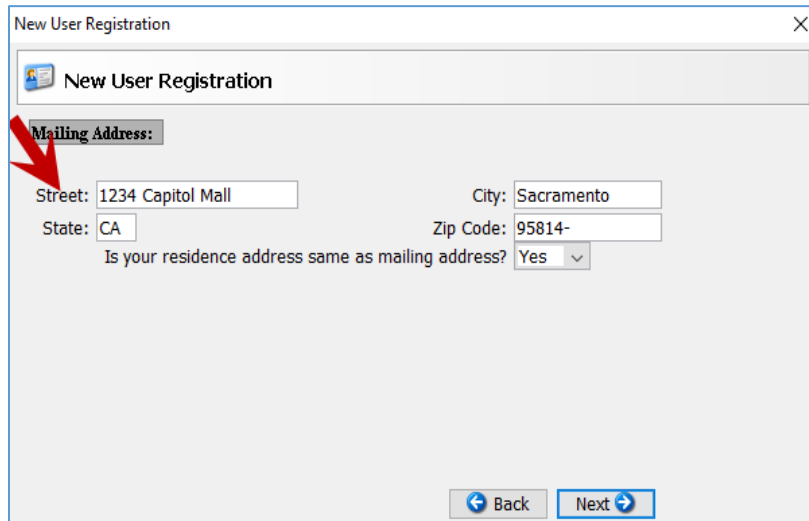
12) **Mailing Address**

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.

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

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.

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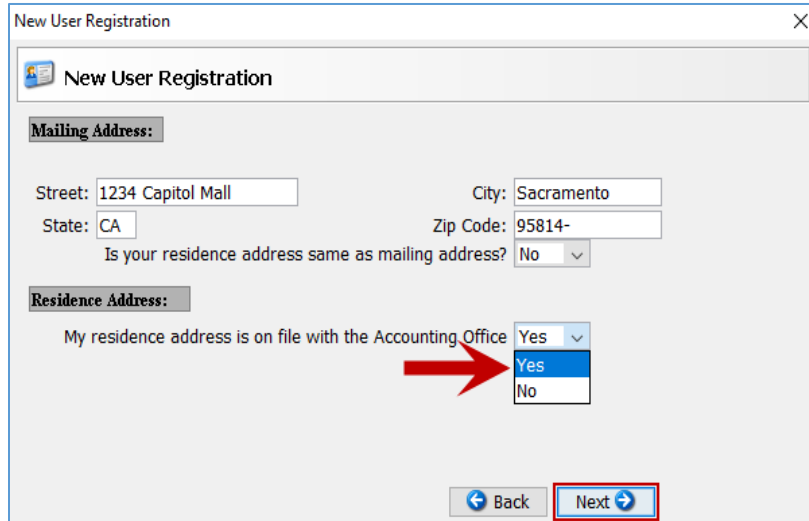
13) **Residence Address**

   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.

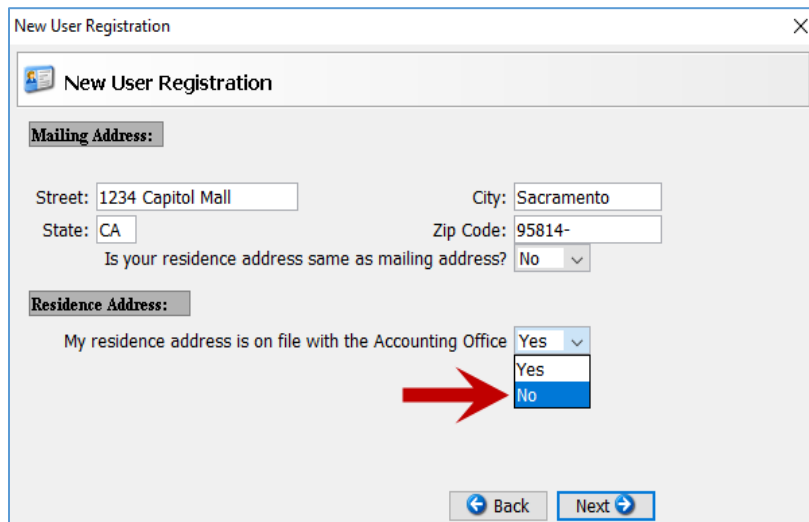   Note: Employee/non-employees who do not want to disclose their address due to safety/personal issues are not required to provide a residential address if the address is on file at with the accounting office. Ensure this address on file is kept current. Department accounting office use this address to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

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

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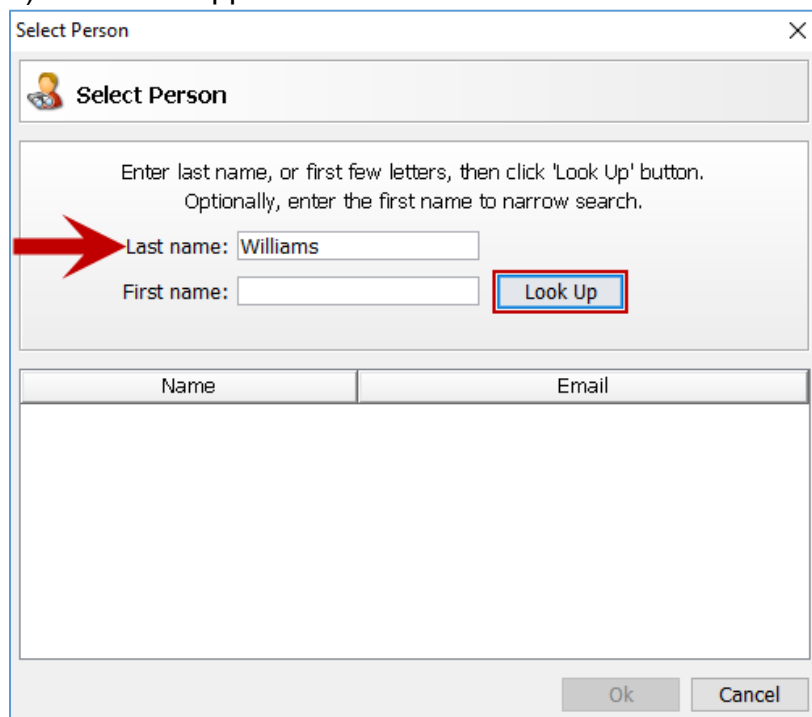

14) **Default Approver**

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.

b) Enter the approver's Last name. Then select the **Look Up** button.
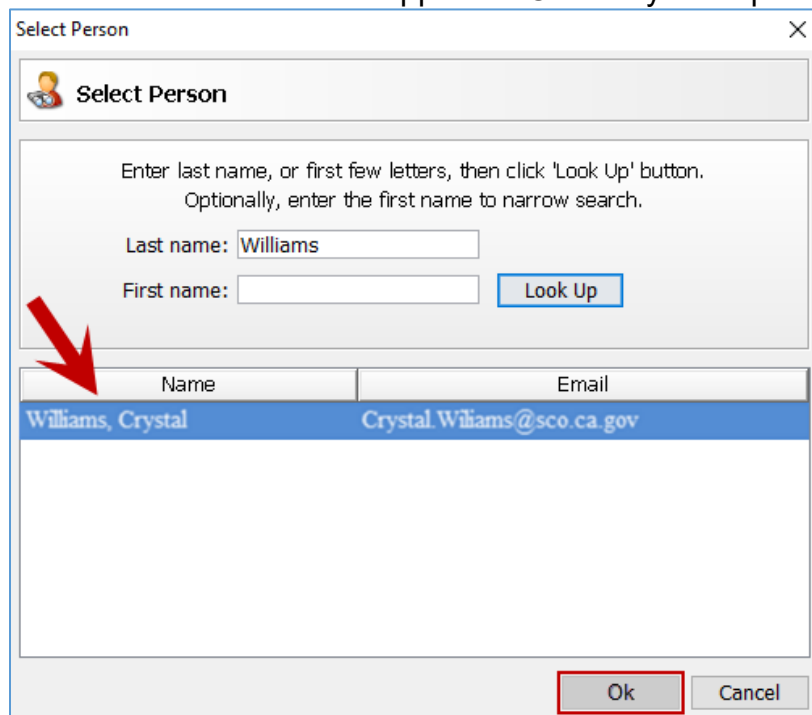
c) Select **approve**r by highlighting the name. Then select the **Ok** button.
Note: Only approvers that have registered in CalATERS Global will populate on the list. If you are unable to locate your approver, it could be that they have not registered or will need to be added as a approver. Contact your supervisor/manager.

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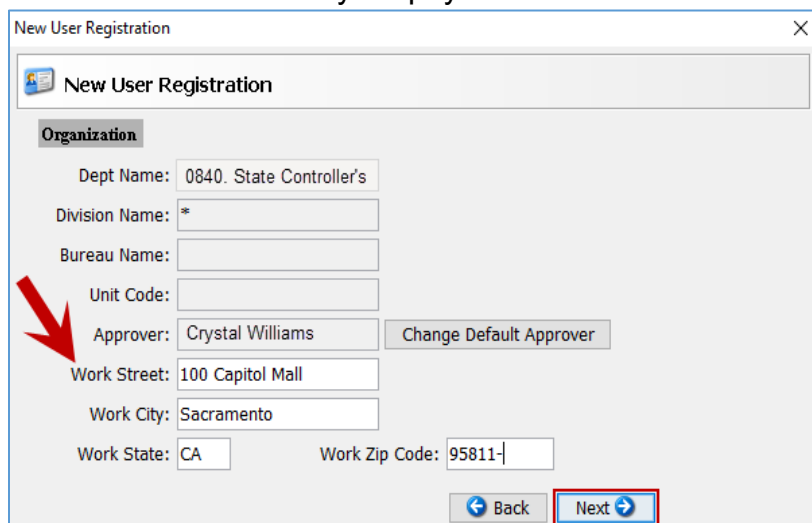
15) **Work Address**
   Enter in the address of your physical work location. Then select the **Next** button.

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.

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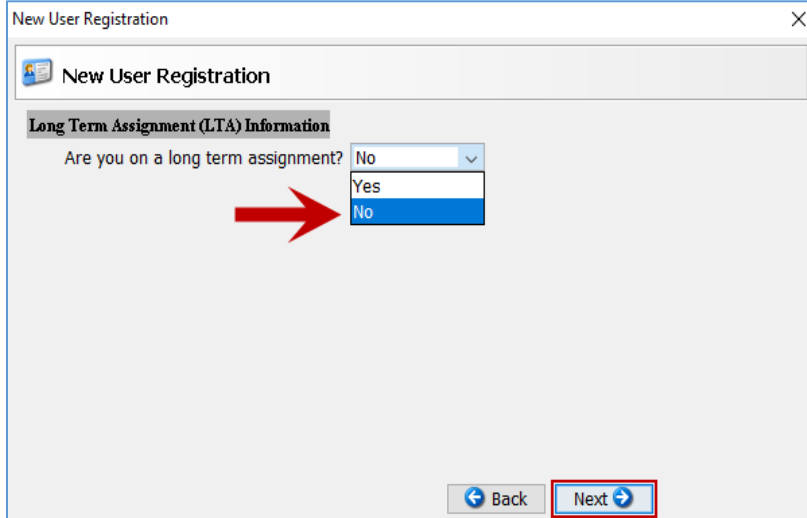
17) **Long Term Assignment (LTA) Information**
   a) LTA is a pre-approved business trip of more than 30 days. If you are not on a LTA, select the drop-down button and select **No**. Then select the **Next** button.

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

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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: [ ] -

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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-

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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.
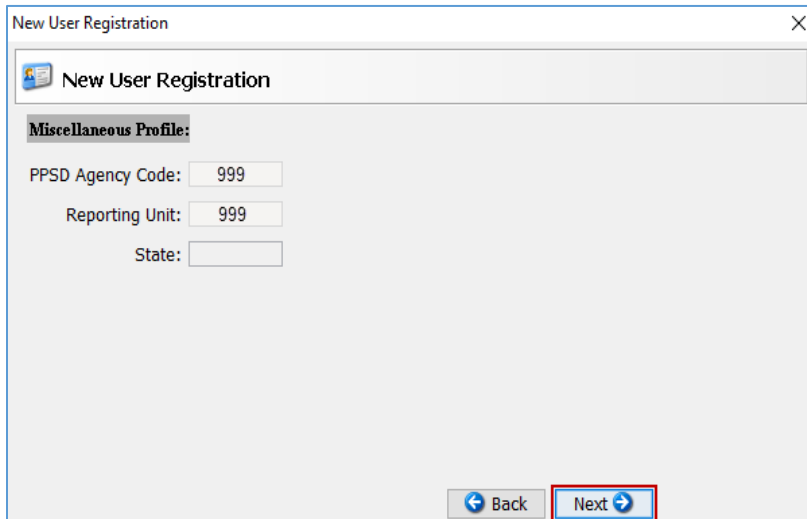
   b) Non-State Employees: The PPSD Agency Code and Reporting Unit will be 999/999 for non-state employees. The user doesn't enter data on this screen. Select the **Next** button.
   Note: The miscellaneous profile is grayed out and cannot be modified. This was preloaded by your department accounting office.

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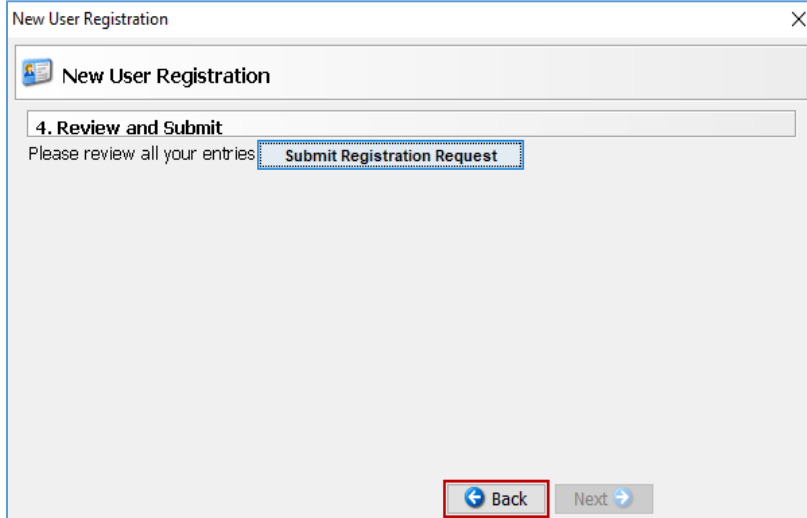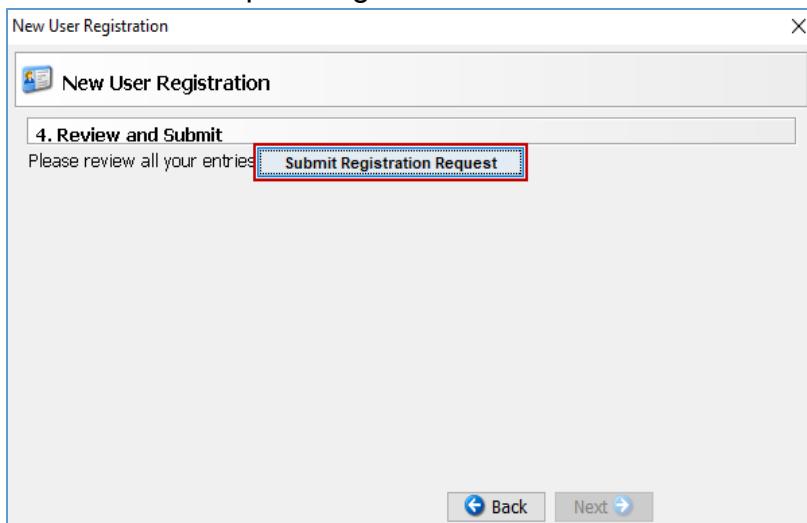
19) **Review and Submit**

   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.

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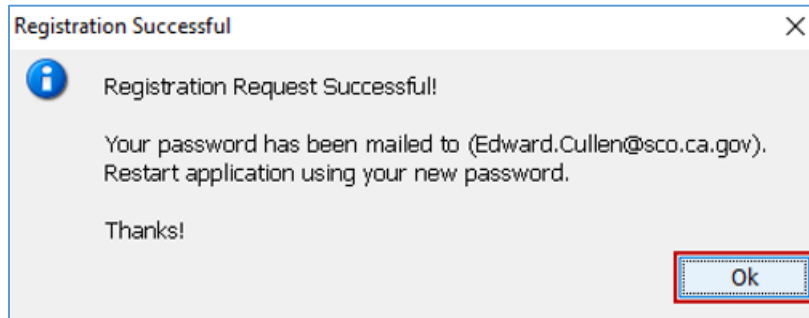20) **Registration Successful**

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.