Create Expense Reimbursement

Instructions for creating Expense Reimbursement (no Specialized Account Coding).

Step 1

Click the **CalATERS** button.

From the CalATERS web site at

www.calaters.ca.gov, click [CalATERS] .

Step 2

Key User ID and Password.
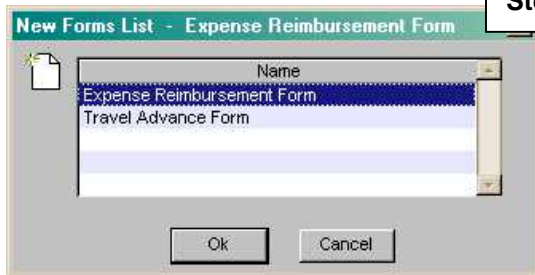
Click [Sign In] .

Step 3
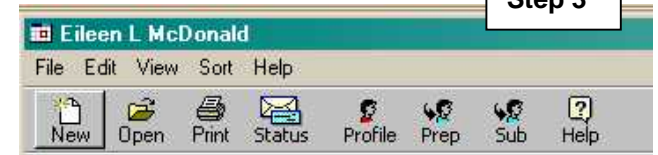
From the Work Queue, verify [Profile] .

Click [New] to begin the Expense Reimbursement form.
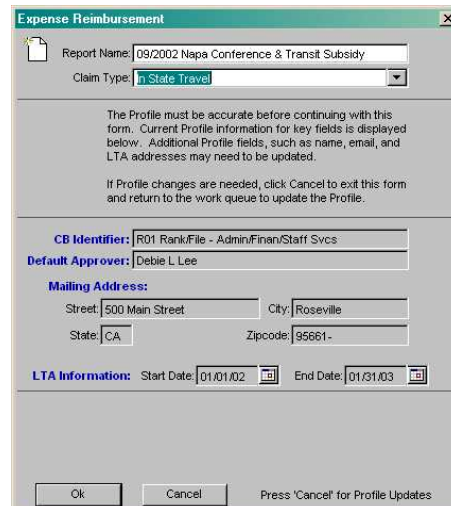
Step 4

Select "Expense Reimbursement Form" and click [Ok] .
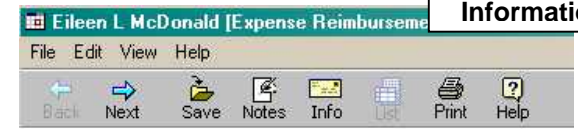
Step 5

Key the report name and select a claim type.

Click [Ok] .

Step 6 Information

If you need to exit the form before completion, click [Save] , then File, Close. The form will be saved as a draft.

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Step 7

Click ▼, select the Trip Type and complete fields. Click **Add**. Up to four trips can be added to one form. Click tab 3. Expenses.

Step 8

A tab will display for each trip that was added. Click the ▼ in left column, select and key expenses for all trips. Click tab 4. Completion.

Step 9

Review the Receipts, Review Items and Travel Advance Recovery tabs (if applicable). Review Summary, then click Submission tab.
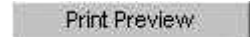
Step 10

The Submission tab displays your approver. If necessary use **Change Approver** to select a different approver for this form, or **Add Approver** to add an additional approver.

Key your password and click **Submit**.

Step 11

Select a Receipt Address. Click **Ok**.

Select "Transmittal Page" and click **Print Preview**.

Step 12

Click **Print...** and select print options.

Click **Close**. Attach receipts to Transmittal Sheet and forward to approver (based on Department policy).