Creating aCertify Expense Report
(with credit card charges only)

- Log into Certify using your full Bowdoin College email address and your password. If you have forgotten your password click on the "Lost Password Wizard" from the Certify Login page.
- Scan receipts for each expense (see instructions for adding receipts to your Certify wallet)
- Verify that the number of receipts you scanned were accepted into Certify

• Review date range by clicking on the expenses in your wallet.
  o Helpful Note: It may be helpful to write down the date range before proceeding to the next step
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- Click on HOME

- Click on Step 2 – Use the Auto Expense Report Wizard to create your expense report (make sure you are in Automatic).
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- Click on “Add expenses and receipts to a new expense report
- Click Next

Automatic Expense Report Wizard

- Enter Report Name (e.g., July expenses)
- Enter Start Date and End Date
- Description is not required at this step
- Click Next
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- After reviewing the confirmation page, click Next (there is one expense and one receipt in the example below)

- If Link Receipts displays, click to match up your receipts to the appropriate expense.
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- If Cleanup Wizard displays, click to review information.

  ![Expense Report Cleanup Wizard](image)

- Review/update information
  - Helpful hint: The description field generally needs more information (e.g., I changed ARCTIC INTERNATIONAL LLC 301-555-1212 TO ARCTIC INTERNALTIONAL LLC Glacier Tax Prep for tax year 2013)
  - Credit card transactions will always default to “the company paid, do not reimburse me”.
- Click on Save and Exit
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- Click on Submit for Approval

- Click on OK
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- Enter a comment if applicable
- Click on “Submit for Approval”
- The expense report will be electronically routed to your manager for approval
  - The manager has the option to either approve or disapprove
    - If approved, you will receive an email indicating the expense report is making progress
    - If disapproved, you will receive an email indicating it was disapproved and for what reason; you will have the ability to edit and resubmit to your manager

- Click on “Return to Home Page”
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- You can follow your expense report status by reviewing the My Expense Reports section on your Home page:
  - Pending Approval – waiting for manager’s approval
  - Pending Payment – approved by your manager, waiting to be imported into the Accounts Payable system
  - Archived – remains in Archived for future referral