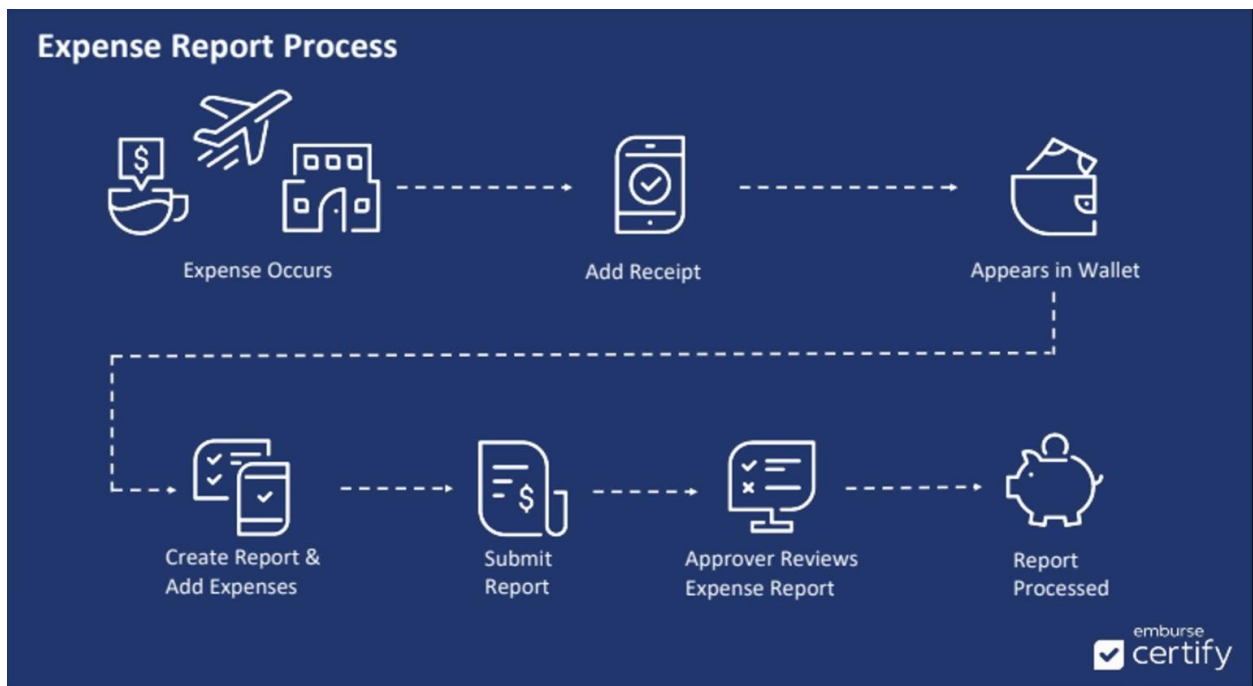


## Information on Certify Expense Reporting System (updated on 7/29/2021)

**BACKGROUND** - Effective 8/1/2021, UIC is implementing a new expense reporting system call CERTIFY. Employees will no longer prepare expense reports in Excel.

**BASIC STEPS** - An employee takes the following three steps to create an expense report:

1. **WALLET** - Load receipts into your via the mobile app, upload, or email. Assign each receipt to a category along with needed information.
2. **EXPENSE REPORT** – Select these expenses in your wallet to bundle in an expense report.
3. **SUBMIT** – This sends your expense report for management and accounting approval before payment.



**SETTLEMENT** – Reimbursement will no longer be paid through Plex. Here is the process.

- Approved expense reports will be pushed to Paycor.
- Reimbursement will be included with your next paycheck.
- The reimbursement is NOT taxable income and not subject to any withholdings.
- For security purposes, employee banking information will no longer be retained in Plex.
- To meet the Payroll cutoff deadlines, you should submit your expense report no later than 5 business days BEFORE your next pay date.

**REGISTRATION** – The steps to register an account are as follows:

- Welcome Email – you will receive a Welcome Email. Once you receive, use the information to sign in.

---

**From:** accounts@certify.com <accounts@certify.com>  
**Sent:** Thursday, July 29, 2021 9:26 AM  
**To:** [REDACTED]@usuiusa.com>  
**Subject:** Welcome to Certify



## Welcome to Certify

Hello [REDACTED]

Timothy Sircy has created a Certify account for you.

Certify makes it easy to book travel and submit expense reports. Using our mobile apps you can receive travel and expenses while you travel. It's quick and easy, so get started today.

To get started visit <https://www.certify.com/Login.aspx> and log in using the following credentials:

**Username:** [REDACTED]@usuiusa.com  
**Temporary Password:** [REDACTED]

Get up to speed on Certify at our Training Camp:  
<https://certify.zendesk.com/hc/en-us/categories/200227064-Training-Camp>

If you wish to verify the authenticity of this email, please contact Timothy at [tsircy@usuiusa.com](mailto:tsircy@usuiusa.com) or by some other means.

We hope you enjoy using Certify.

===|F0B8E85EC1C7D67C902838B793AA2D1D50954A34F6871EE0D48198DACD8BF46831A0F89BC01


Regards,  
The Certify Team

Need help? Visit Certify Support at <https://help.certify.com>

- You will be required to re-set your password. The password requirements are as follows:

The password strength conditions are:

- at least 6 characters (required)
  - at least 8 characters
  - one lowercase letter
  - one uppercase letter
  - one numeric character
  - one special character: !@#\$%^&\*()\_+=,.<>?;:/
- If you are not registered or forgot your password, ask either an Administrator or HR to resend a Welcome Email.
  - Two factor authentication is required.
  - Go to ACCOUNTS SETTING add a personal email address and add a mobile phone number.
- Mobil App – Download the mobile app to your phone and register it. Most people manage with the phone app.

**TRAINING** – There several options of training. After signing into Certify, there is  in the upper right-hand corner. When you click on this, you go to the Support area.

## Support

### Certify Help Center



#### Looking for something specific?

Browse how-to articles or contact our Customer Support team.

[Help Center](#)



#### New to Certify?

Learn the basics with training webinars and tutorials.

[Training Camp](#)



#### Quick Links

- [Implementing Certify Expense](#)
- [Resetting a User's Password](#)
- [Creating New Users](#)
- [Creating a New Expense Category](#)
- [View and Edit Policies](#)

- **HELP CENTER** – You click on the ALL VIDEOS button to gain access to very short, recorded introductions (about 4 minutes each) to these topics:
  - Certify Mobil
  - Certify Wallet
  - Creating Expense Reports
  - Approving and Processing Reports

## Watch Training Videos



[All Videos](#)

- TRAINING CAMP – If you would like additional training, you can register at no cost for a live webinar. The CREATING & SUBMITTING EXPENSE REPORTS is extremely helpful and offered every Tuesday and Thursday



## Training Calendar

### Expense

#### Creating & Submitting Expense Reports

How to create, review, and edit your expense reports.

[Register Now](#)

Available Tuesdays

or

[Register Now](#)

Available Thursdays

#### Configuring Company Settings for Admins

How to manage your company's data and settings.

[Register Now](#)

#### Approving & Processing Expense Reports

How to approve and process employees' expense reports.

[Register Now](#)

#### Reporting Overview Training

An overview of how to use Reporting.

[Register Now](#)

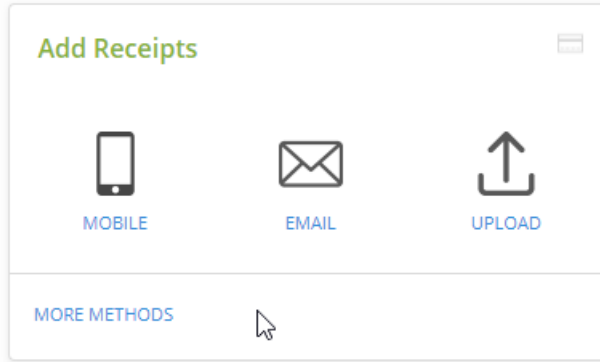
- Read POPULAR ARTICLES. After attending the webinar, you can review a recording under the RECORDED TRAINING.

## Popular Articles

- ✓ [Forgot Your Password?](#)
- ✓ [Uber Receipt Integration](#)
- ✓ [Creating a New Expense Report](#)
- ✓ [Adding Receipts using Certify Mobile](#)
- ✓ [Recorded Trainings](#)

**LOADING RECEIPTS** – There are three ways to get receipts into Certify.

- **Mobil App**
  - Log into the Certify Mobil app
  - Select ADD RECEIPT.
  - Select HIGH resolution
  - Take a picture. If clear, select USE PHOTO. If not clear, select RETAKE.
  - System will take you to the ENTER EXPENSE screen. Select AUTOFILL. The system will try to select the category and fill in the fields.
  - Review, modify, and update as necessary. If a meal, you will need select ATTENDEES to list.
  - When done, select SAVE.
  - When finished, select the SYNC button to push these receipts into your on-line account.
- **Email**
  - Go to a registered email account ([XXXX@usuiusa.com](mailto:XXXX@usuiusa.com) or a personal account listed in your Profile).
  - Create an email to [receipts@certify.com](mailto:receipts@certify.com)
  - Attach the .pdf document, then send.
  - This receipt will appear MY WALLET.
- **Upload**
  - Signed into your Certify account on your computer
  - Select the UPLOAD button. This will place the receipt in MY WALLET.



**PER DIEM** – Here are the steps to add Per Diem.

- Create an Expense Report
- Select the PER DIEM WIZZARD

**Expense Report** [Link Receipts](#) | [Per Diem Wizard](#) | [Print Report](#)

Report Name 2021.06 Expenses [Submit for Approval](#)

Dates 6/12/2021 - 7/1/2021

- Check the boxes on the days.

### Per Diem Wizard

Use this wizard to easily create per diem expenses for many days at once.

6	7	8	9	10	11	12 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day
13 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	14 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	15 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	16 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	17 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	18 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	19 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day
20 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	21 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	22 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	23 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	24 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	25 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	26 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day
27 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input type="checkbox"/> Per Diem - Travel Day	28 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input checked="" type="checkbox"/> Per Diem - Travel Day	29 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input checked="" type="checkbox"/> Per Diem - Travel Day	30 <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input checked="" type="checkbox"/> Per Diem - Travel Day	1 July <input type="checkbox"/> Per Diem - Domestic <input type="checkbox"/> Per Diem - Int'l <input checked="" type="checkbox"/> Per Diem - Travel Day	2	3

- TRAVEL DAYS \$41.25 – first day and last day of trip
- USA FULL DAYS - \$55 per day
- INTERNATIONAL FULL DAYS - \$90 per day