

## **PEO VOLUNTEERS OFFERED USE OF ONLINE EXPENSE CLAIM SYSTEM**

By Michael Mastromatteo

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PEO's finance department is expanding its use of Certify software to make it easier for volunteers and staff to sub-mit and be compensated for expenses.

Described as a fully integrated expense report and management solu-tion, the Certify program was rolled out to PEO staff in November 2016. It was made available to volunteers in July, and some senior volunteers have already made use of the new system.

Volunteers can continue using the traditional paper-based expense pay-ment system if they choose. Certify users, however, must be signed up for electronic funds transfer (ETF).

PEO Director of Finance Chetan Mehta says staff members have made positive use of Certify over the last several months, and the experience has allowed the finance department employees to fine-tune the expense reporting and compensation system.

Mehta says Certify allows for a 30 per cent improvement in turn-around time—that is the time elapsed between when an expense is filed and when it's paid out to the claimant's bank account.

Another advantage of Certify is that it eliminates the need for data entry by PEO finance department staff. It also includes enhancements, such as allowing volunteers to snap photos of receipts and submit them directly from their smart phones.

Certify comes with thorough user guides, training materials and cus-tomer support, Mehta adds. "It's really a powerful system that supports our efforts to make the expense claiming system more transparent and compre-hensive," Mehta says.



To submit expenses for fast and easy payment, PEO recommends using Certify, an electronic system available both online and mobile app.

To get started using Certify, email [peoapcertify@peo.on.ca](mailto:peoapcertify@peo.on.ca) for account setup.

## Add Receipts using the Certify Mobile App

**Step 1:** Download the Certify Mobile app on your [iPhone](#), [Android](#), [Blackberry](#) or [Windows](#) mobile device.

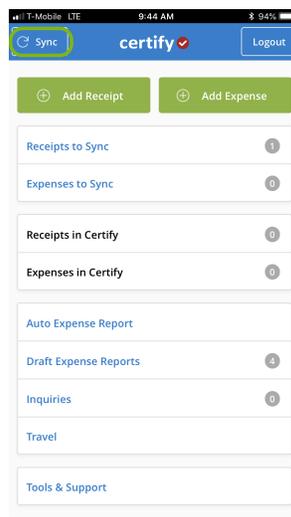
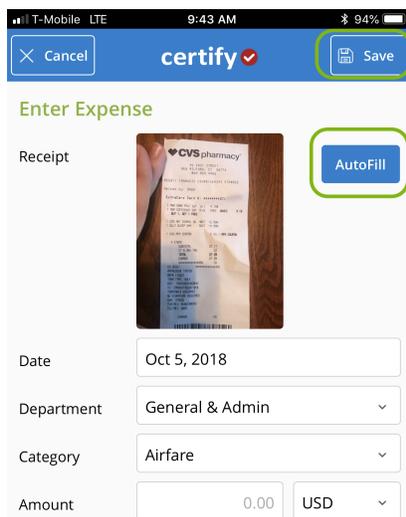
**Step 2:** Login to the app with your Certify username and password.

**Step 3:** Tap the yellow **Add Receipt** button and take a photo of your receipt.

**Step 4:** Tap the **Autofill** button, and then enter the remaining expense details. Tap **Save**.

**Step 5:** Tap the **Sync** button in the upper left-hand corner of the homepage. Receipts will now be available in your [Certify Wallet](#).

For a more in-depth guide on using the Certify Mobile app, please see the article [Adding Receipts Using Certify Mobile](https://help.certify.com/hc/en-us/articles/203102674-Adding-Receipts-using-Certify-Mobile) (<https://help.certify.com/hc/en-us/articles/203102674-Adding-Receipts-using-Certify-Mobile>)



## Create your Expense Report

**Step 1:** In your Certify account on the web, view your Receipts and Expenses in your [Certify Wallet](#).

**My Certify Wallet** 7

7/25/17	Coffee, Tea, Sna...	\$0.00
6/22/17	Florent	\$72.19
6/22/17	Amazon	\$7.78

**4 MORE ITEMS**

**My Expense Reports**

**New Expense Report**

- Drafts 0
- Pending Approval 1
- Pending Payment 0
- Archived 1

**Step 2:** On the Certify homepage, click the **New Expense Report** button.

**My Certify Wallet** 7

7/25/17	Coffee, Tea, Sna...	\$0.00
6/22/17	Florent	\$72.19
6/22/17	Amazon	\$7.78

**4 MORE ITEMS**

**My Expense Reports**

**New Expense Report**

- Drafts 0
- Pending Approval 1
- Pending Payment 0
- Archived 1

**Step 3:** Select the option to **Add all items to a new expense report**.

**Step 4:** Enter an expense report name and date range. Click **Next**.

**Step 5:** On the next page, click Finish to see your new draft expense report. Certify will automatically merge receipts and credit card expenses with the same date and amount.

For a more in-depth guide on creating your expense report, please see the article **Creating a New Expense Report** (<https://help.certify.com/hc/en-us/articles/202659764-Creating-a-New-Expense-Report>)

**Expense Report** Link Receipts Cleanup Wizard Print Report

Report Name Expenses - 6/1/2017 - 6/30/2017 Submit for Approval

Dates 6/1/2017 - 6/30/2017

**Expenses**

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input type="checkbox"/>	6/8/2017	Operations	Unknown	<input checked="" type="checkbox"/>	144.00	Yes	144.00	No	<input type="checkbox"/>	
<input type="checkbox"/>	6/16/2017	Operations	Miscellaneous	<input checked="" type="checkbox"/>	32.40	No	0.00	No	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	6/22/2017	Operations	Meals - Breakfast	<input checked="" type="checkbox"/>	7.78	No	0.00	No	<input type="checkbox"/>	
<input type="checkbox"/>	6/22/2017	Operations	Meals - Dinner	<input checked="" type="checkbox"/>	72.19	No	0.00	No	<input type="checkbox"/>	<input type="checkbox"/>

Total Non-Reimbursable \$112.37  
Total Personal \$0.00  
Total Reimbursable \$144.00

## Edit your Expense Report

**Step 1:** Use the [Link Receipts Wizard](#) to attach receipts in your **Certify Wallet** to expense lines.

**Expense Report** [Link Receipts](#) [Cleanup Wizard](#) [Print Report](#)

Report Name: Expenses - 6/1/2017 - 6/30/2017  
Dates: 6/1/2017 - 6/30/2017 [Submit for Approval](#)

**Expenses**

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
 	6/8/2017	Operations	Unknown	 	144.00	Yes	144.00	No		
 	6/16/2017	Operations	Miscellaneous	 	32.40	No	0.00	No		
 	6/22/2017	Operations	Meals - Breakfast	 	7.78	No	0.00	No		
 	6/22/2017	Operations	Meals - Dinner	 	72.19	No	0.00	No		
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

**Step 2:** Use the [Clean Up Wizard](#) to edit receipts that need attention, indicated by the red triangle in the Expense column.

**Expense Report** [Link Receipts](#) [Cleanup Wizard](#) [Print Report](#)

Report Name: Expenses - 6/1/2017 - 6/30/2017  
Dates: 6/1/2017 - 6/30/2017 [Submit for Approval](#)

**Expenses**

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
 	6/8/2017	Operations	Unknown	 	144.00	Yes	144.00	No		
 	6/16/2017	Operations	Miscellaneous	 	32.40	No	0.00	No		
 	6/22/2017	Operations	Meals - Breakfast	 	7.78	No	0.00	No		
 	6/22/2017	Operations	Meals - Dinner	 	72.19	No	0.00	No		
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

**Step 3:** Edit individual expense lines by clicking the pencil icon.

**Expense Report** [Link Receipts](#) [Cleanup Wizard](#) [Print Report](#)

Report Name: Expenses - 6/1/2017 - 6/30/2017  
Dates: 6/1/2017 - 6/30/2017 [Submit for Approval](#)

**Expenses**

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
 	6/8/2017	Operations	Unknown	 	144.00	Yes	144.00	No		
 	6/16/2017	Operations	Miscellaneous	 	32.40	No	0.00	No		
 	6/22/2017	Operations	Meals - Breakfast	 	7.78	No	0.00	No		
 	6/22/2017	Operations	Meals - Dinner	 	72.19	No	0.00	No		
Total Non-Reimbursable					\$112.37					
Total Personal					\$0.00					
Total Reimbursable					\$144.00					

**Step 4: Add mileage expenses in the Add Expense box.**

**Add Expense**

Date: 6/22/2017

Department: Operations

Category: Mileage

From: 20 York Street, Portland, Maine

To: 1 Monument Square, Portland, Maine

Miles: 1.8 **MapIt!**

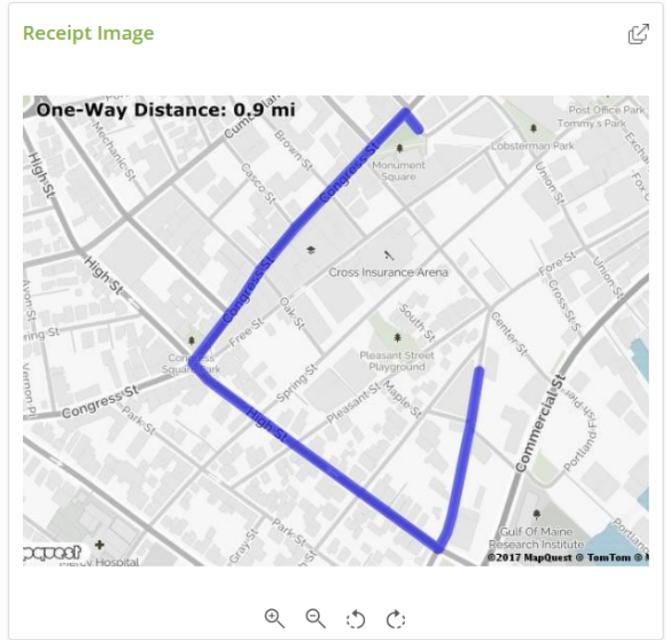
Round Trip:

Reason:

Reimbursable: I paid for this, please reimburse me.

Billable:

Receipt:



**Step 5: Use the Other Actions menu to split expenses (itemize).**

**Expense Report** Link Receipts | Cleanup Wizard | Print Report

Report Name: Expenses - 6/1/2017 - 6/30/2017

Dates: 6/1/2017 - 6/30/2017

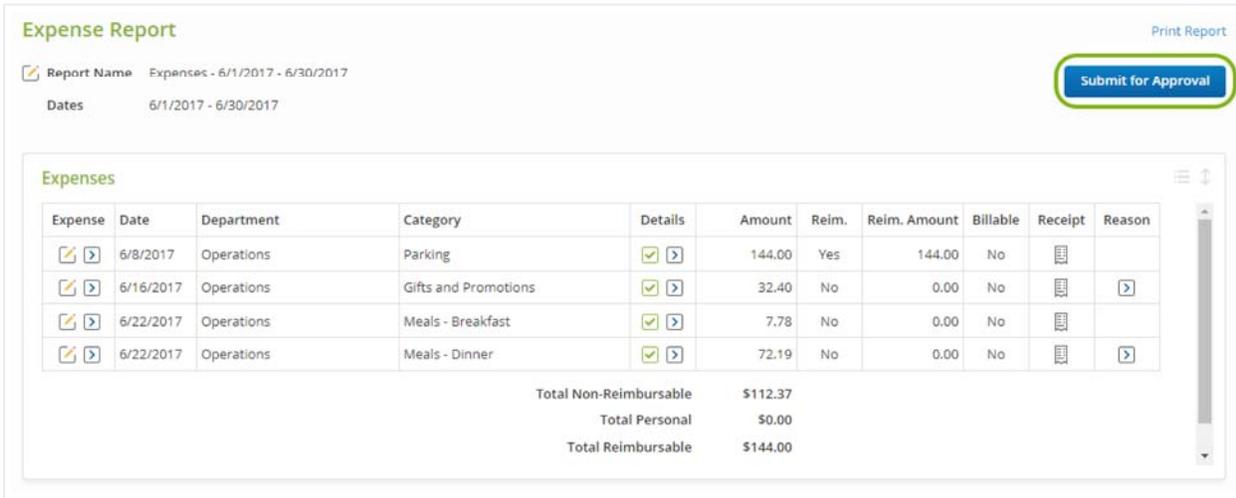
**Expenses**

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input checked="" type="checkbox"/> <b>Other Actions</b>			Unknown	<input checked="" type="checkbox"/>	144.00	Yes	144.00	No	<input type="button" value="Receipt"/>	
<input checked="" type="checkbox"/> <b>Delete Expense</b>			Miscellaneous	<input checked="" type="checkbox"/>	32.40	No	0.00	No	<input type="button" value="Receipt"/>	<input type="button" value="Reason"/>
<input checked="" type="checkbox"/> <b>Split Expense</b>			Meals - Breakfast	<input checked="" type="checkbox"/>	7.78	No	0.00	No	<input type="button" value="Receipt"/>	
<input checked="" type="checkbox"/> <b>Add Bank Fee</b>			Meals - Dinner	<input checked="" type="checkbox"/>	72.19	No	0.00	No	<input type="button" value="Receipt"/>	<input type="button" value="Reason"/>
<input checked="" type="checkbox"/> <b>Add Image</b>										
<b>Total Non-Reimbursable</b>					<b>\$112.37</b>					
<b>Total Personal</b>					<b>\$0.00</b>					
<b>Total Reimbursable</b>					<b>\$144.00</b>					

# Submit for Approval

**Step 1:** Verify that everything on your expense report is accurate.

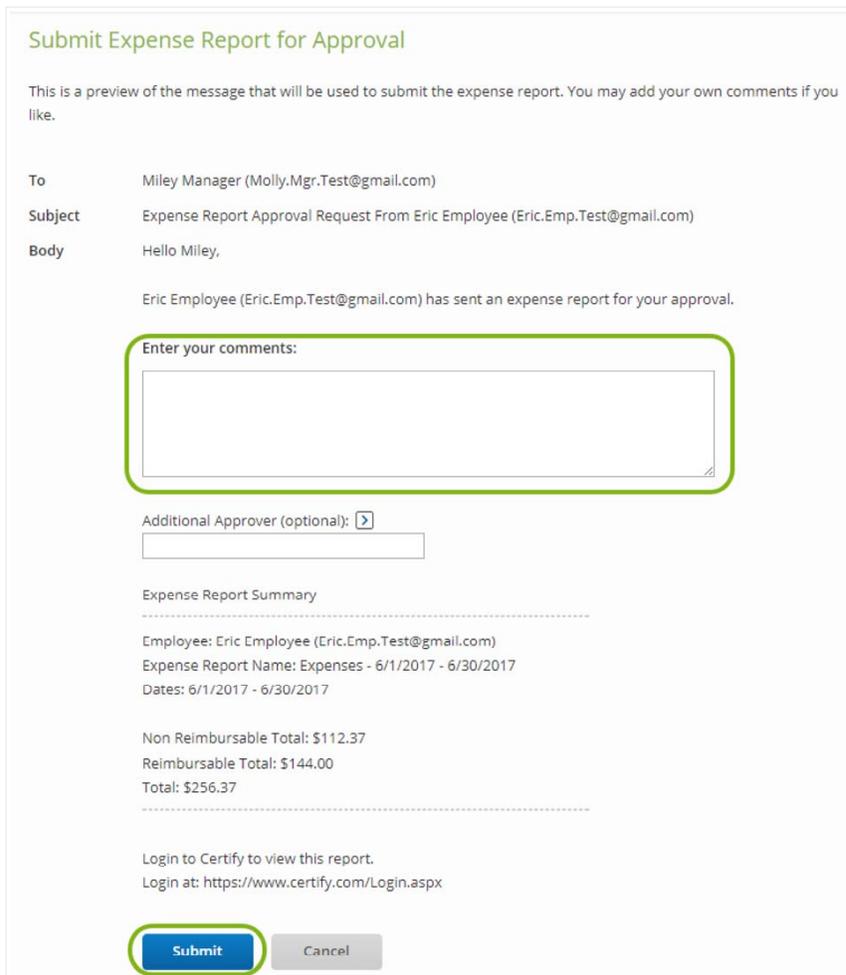
**Step 2:** Click **Submit for Approval**.



The screenshot shows the 'Expense Report' interface. At the top, it displays the report name 'Expenses - 6/1/2017 - 6/30/2017' and the dates '6/1/2017 - 6/30/2017'. A 'Print Report' link is in the top right. A prominent blue button labeled 'Submit for Approval' is highlighted with a green border. Below this is a table of expenses with columns for Expense, Date, Department, Category, Details, Amount, Reim., Reim. Amount, Billable, Receipt, and Reason. The table lists four items: Parking (\$144.00), Gifts and Promotions (\$32.40), Meals - Breakfast (\$7.78), and Meals - Dinner (\$72.19). A summary at the bottom shows: Total Non-Reimbursable: \$112.37, Total Personal: \$0.00, and Total Reimbursable: \$144.00.

Expense	Date	Department	Category	Details	Amount	Reim.	Reim. Amount	Billable	Receipt	Reason
<input type="checkbox"/>	6/8/2017	Operations	Parking	<input checked="" type="checkbox"/>	144.00	Yes	144.00	No		
<input type="checkbox"/>	6/16/2017	Operations	Gifts and Promotions	<input checked="" type="checkbox"/>	32.40	No	0.00	No		<input type="checkbox"/>
<input type="checkbox"/>	6/22/2017	Operations	Meals - Breakfast	<input checked="" type="checkbox"/>	7.78	No	0.00	No		
<input type="checkbox"/>	6/22/2017	Operations	Meals - Dinner	<input checked="" type="checkbox"/>	72.19	No	0.00	No		<input type="checkbox"/>
<b>Total Non-Reimbursable</b>					<b>\$112.37</b>					
<b>Total Personal</b>					<b>\$0.00</b>					
<b>Total Reimbursable</b>					<b>\$144.00</b>					

**Step 3:** Enter optional comments for your Approver, and click **Submit**.



The screenshot shows the 'Submit Expense Report for Approval' screen. It includes a preview of the email message that will be sent to the approver. The email body contains the following text: 'Eric Employee (Eric.Emp.Test@gmail.com) has sent an expense report for your approval.' Below this is a text area labeled 'Enter your comments:' which is highlighted with a green border. There is also an 'Additional Approver (optional):' field. At the bottom, there is an 'Expense Report Summary' section with the following details: Employee: Eric Employee (Eric.Emp.Test@gmail.com), Expense Report Name: Expenses - 6/1/2017 - 6/30/2017, Dates: 6/1/2017 - 6/30/2017, Non Reimbursable Total: \$112.37, Reimbursable Total: \$144.00, Total: \$256.37. A 'Login to Certify to view this report.' link is provided with the URL: https://www.certify.com/Login.aspx. At the bottom, there are 'Submit' and 'Cancel' buttons, with the 'Submit' button highlighted by a green border.

**Submit Expense Report for Approval**

This is a preview of the message that will be used to submit the expense report. You may add your own comments if you like.

**To:** Miley Manager (Molly.Mgr.Test@gmail.com)  
**Subject:** Expense Report Approval Request From Eric Employee (Eric.Emp.Test@gmail.com)  
**Body:** Hello Miley,

Eric Employee (Eric.Emp.Test@gmail.com) has sent an expense report for your approval.

Enter your comments:

Additional Approver (optional):

**Expense Report Summary**

Employee: Eric Employee (Eric.Emp.Test@gmail.com)  
Expense Report Name: Expenses - 6/1/2017 - 6/30/2017  
Dates: 6/1/2017 - 6/30/2017

Non Reimbursable Total: \$112.37  
Reimbursable Total: \$144.00  
Total: \$256.37

Login to Certify to view this report.  
Login at: <https://www.certify.com/Login.aspx>

**Submit**

**Step 4:** Review your expense report status in the **Pending Approval** folder.