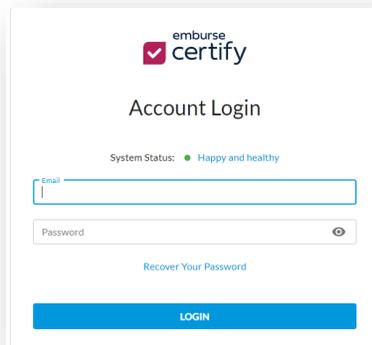


Submitting Expense Reports in Certify

A. Getting Started:

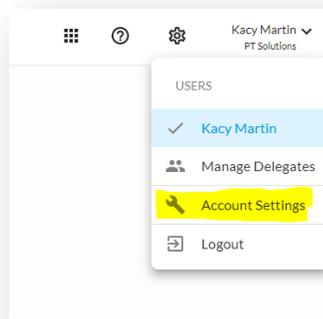
Visit <https://www.certify.com/Login.aspx> to login

If you are experiencing account or expense report issues, e-mail Certify@PTSolutions.com



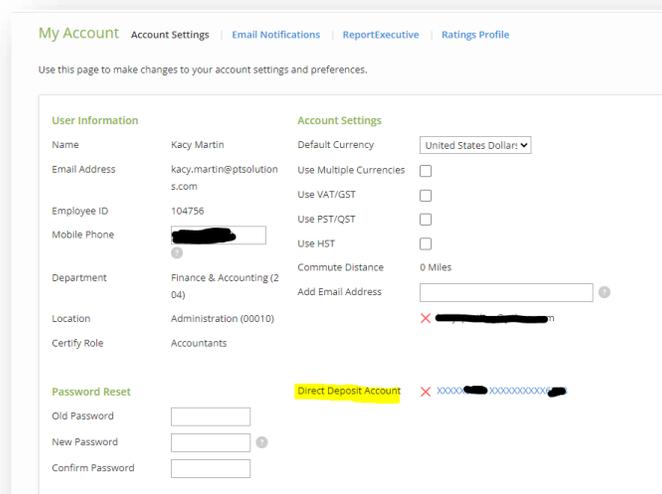
The screenshot shows the 'Account Login' page for emburse certify. At the top, there is a logo with a red checkmark and the text 'emburse certify'. Below the logo, the heading 'Account Login' is centered. Underneath, the system status is shown as 'System Status: Happy and healthy' with a green dot. There are two input fields: 'Email' and 'Password'. Below the password field is a link for 'Recover Your Password'. At the bottom, there is a blue 'LOGIN' button.

Once you have successfully accessed your account, you will need to ensure your Banking Information is added before submitting your first expense report. *Navigate to the right-hand side of the screen and select account settings:



The screenshot shows a user profile dropdown menu for 'Kacy Martin, PT Solutions'. The menu is open, showing several options: 'USERS', 'Kacy Martin' (with a checkmark), 'Manage Delegates', 'Account Settings' (highlighted in yellow), and 'Logout'.

Here is where you will add the Direct Deposit information:



The screenshot shows the 'My Account' settings page. The breadcrumb trail is 'My Account > Account Settings > Email Notifications > ReportExecutive > Ratings Profile'. Below the breadcrumb, there is a message: 'Use this page to make changes to your account settings and preferences.' The page is divided into two columns: 'User Information' and 'Account Settings'.
Under 'User Information', there are fields for Name (Kacy Martin), Email Address (kacy.martin@ptsolution.s.com), Employee ID (104756), Mobile Phone (redacted), Department (Finance & Accounting (204)), Location (Administration (00010)), and Certify Role (Accountants).
Under 'Account Settings', there are several options: Default Currency (United States Dollars), Use Multiple Currencies (checkbox), Use VAT/GST (checkbox), Use PST/QST (checkbox), Use HST (checkbox), Commute Distance (0 Miles), and Add Email Address (redacted).
At the bottom, there is a 'Password Reset' section with fields for Old Password, New Password, and Confirm Password. A 'Direct Deposit Account' section is highlighted in yellow, showing a red 'X' and a redacted account number.

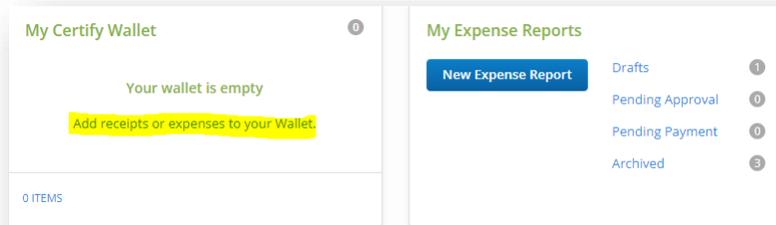
*Please double check your deposit information, if your reimbursement fails, you will have to create a new report from scratch and resubmit!

B. Adding Receipts:

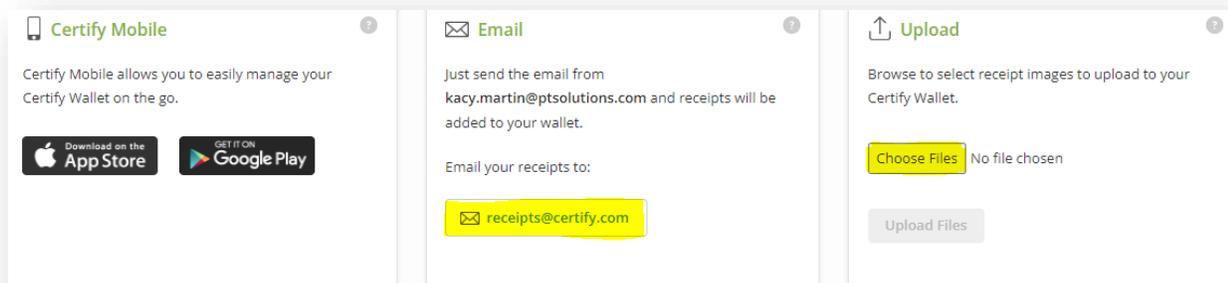
Now you can navigate back home.

Next, you will want to upload the receipts you are seeking reimbursement for. All reimbursable expenses need to be accompanied by a valid receipt.

*If you are submitting mileage only, you can skip this step



There are several ways you can load receipts into Certify:



1. Download the mobile app and upload through your preferred device*

(This is helpful if you need to take a photo of your)

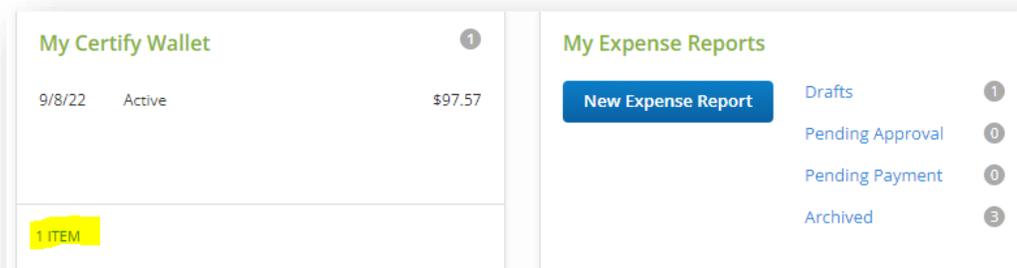
2. E-mail receipts to RECEIPTS@CERTIFY.COM

3. Upload directly from your computer

Once you upload receipts they will show up in your wallet. There are multiple ways to add a receipt to a report.

Here is one option.

From your wallet, click the item count at the bottom:



Next the receipt(s) will need to be added to an existing expense report or create a new one.

The screenshot shows the 'My Certify Wallet' interface. At the top right, there are icons for 'Merge Items', a pencil, a list, an upload arrow, and a refresh arrow. Below the title, there is a 'Receipts' section with a table. The table has columns for 'Source', 'Receipt', 'Date', 'Category/Details', 'Vendor', 'Description', and 'Amount'. A single receipt is listed with a checked checkbox, an upload icon, a receipt icon, the date '9/8/2022', the category 'Employee Race Reimburs...', the vendor 'Active', the description 'Climbing Competition Reimbursement.pdf', and the amount '\$97.57'. Below the receipts, there is an 'Expenses' section which is currently empty, displaying the message 'There are no expenses in your wallet. Imported expenses will appear here.' At the bottom of the interface, there are three buttons: 'Add to Report' (highlighted in yellow), 'Send Items', and 'Delete'.

In this scenario, there is not an existing report, we will proceed with a new one

The screenshot shows a dialog box titled 'Imported Expenses'. It asks 'What would you like to do?' and provides two radio button options: 'Add these expenses to a new expense report' (which is selected) and 'Add these expenses to an existing expense report'. At the bottom of the dialog, there are two buttons: 'Back' and 'Next'.

Next you will want your report to reflect the appropriate dates for your expenses as well as a brief description:

Imported Expenses

Enter expense report information

Expense Report Name

Start Date

End Date

Description

C. Adding Personal Car Mileage:

Add Expense

Date

Department

Category

PT Location Override

Business Line Override

From

To

Miles

Make sure you input the Date of Travel & From and To locations.

If your location is not preloaded into the system, simply enter the physical address and the system will automatically calculate mileage for you.

Then select MapIt!

Add Expense

Date: 8/10/2022

Department: Finance & Accounting

Category: Personal Car Mileage

PT Location Override:

Business Line Override:

From: Cedarcrest

To: Acworth

Miles: 14.4 [MapIt!](#)

Round Trip:

Reason:

Reimbursable: I paid for this, please reimburse me.

Receipt: [Change](#)

[Save](#) [Cancel](#)

Receipt Image

One-Way Distance: 7.2 mi

Map data

IMPORTANT:

The system automatically assumes roundtrip! If this is one way, uncheck the box for the appropriate reimbursement.

Department: Should not be touched unless directed by your manager

PT Location Override: This will be charged to the location you are going TO

Business Line Override: Should not be touched unless directed by your manager

Example of Personal Car Mileage *without* Location Populating:

Add Expense

Date: 8/16/2022

Department: Finance & Accounting

Category: Personal Car Mileage

PT Location Override: Georgia - Wade Green Village

Business Line Override:

From: 1100 circle 75 pkwy, sutie 1400

To: Wade Green Village

Miles: 29.4 [MapIt!](#)

Round Trip:

Reason: Clinic Visit from PSC to Wade Green

Reimbursable: I paid for this, please reimburse me.

Receipt: [Change](#)

[Save](#) [Cancel](#)

Receipt Image

One-Way Distance: 14.7 mi

Map data ©2022

D. Expense Allocations:

Your expenses should be listed in your report. All with an itemized receipt.

It is important that you choose the most appropriate category.

Work with your supervisor or reach out to Certify@ptsolutions.com if you are not sure which category to choose.

PT location Override should only be used when directed by your manager or submitting mileage to a clinic outside of your home clinic.

E. Approval Workflow and Reimbursement

Once receipts have been uploaded and allocated against individual expenses on the report, the report can be submitted for approval. The system will display the individual who the report will be routed to for approval. Certify will automatically notify the approver that the report is ready for review.

Once approved, the report will be routed for payment. Payments are processed once per week via direct deposit. It's very important to ensure that your banking information is setup correctly.