



CalATERS Global FAQs

Question: Who should I contact if I have questions about using CalATERS, my CalATERS account, or the travel advance or expense reimbursement process?

Answer: An employee's [department travel section](#) should always be their first point of contact for any questions or concerns.

Question: How do I create a CalATERS account?

Answer: Employees will need to request a CalATERS profile-add from their [department travel section](#).

Question: What if I completed my CalATERS registration at another state agency before coming to my current department? Do I need to register again?

Answer: Yes. If your former agency did not delete your user information from their system, they will need to notify the State Controller's Office (SCO) to delete your old profile. Once your former agency has deleted your old profile your current department will be able to add your new user profile in their system. Employees should reach out to their [department travel section](#) for assistance.

Question: How do I activate my account once I've been added?

Answer: New users will need to register their account prior to creating a claim or travel advance request. New User Registration instructions are available from the employee's [department travel section](#) or on the CalATERS Global [website](#) by clicking on the Get Started & New User Registration link under the Global Instructions heading, then clicking on the [New User Registration](#) link.

Question: What is my user ID?

Answer: The employee user ID is first displayed during the registration process. If a user has registered their account but forgotten to write down their user ID, they should reach out to their [department travel section](#) for assistance.



CalATERS Global FAQs

Question: Can I access CalATERS on my mobile device?

Answer: Unfortunately, no. CalATERS is accessible 24 hours a day, 7 days a week using a PC. Your PC will need to have access to Java version 8 in order to launch the sign-in screen. If the sign-in screen does not launch, please contact your department IT Help Desk to ensure your PC is configured for CalATERS access.

Question: How do I create an expense claim?

Answer: Registered employees will log-in to their account using the CalATERS Global [website](#). Instructions for how to create a Travel Advance and/or Expense Reimbursement are available through the employee's [department travel section](#) or by contacting the CalATERS Help Desk at calaters@sco.ca.gov.

Question: How do I create an expense claim for a prior fiscal year?

Answer: Users will need to create an expense reimbursement form using specialized account coding. Instructions and account coding information are available from the employee's [department travel section](#). Users may also contact the CalATERS Help Desk at calaters@sco.ca.gov for instructions.

Question: Once my claim has been submitted, how long do I have to wait for payment?

Answer: Expense claims are sent to a supervisor for initial review and approval. Once approved, employee claims are sent to a department's work pool for final review and approval by the employee's [department travel section](#). When a claim has received final approval, the employee will receive an email notification. There is a five-day payment process from the date of final approval to payment. Employees can expect payment in the same way they receive their salary.

Question: How do I view my old CalATERS claims?

Answer: When logged in to CalATERS, a user may access the "Form Archive Retrieval" from the Edit menu. Here, the employee can search by date range to display a full archive of completed claims.



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Question: Since I am not on direct deposit, where should I expect my warrant to be sent?

Answer: Warrants will be sent to the address on file in the employee's CalATERS profile. When registering a CalATERS account, employees are required to enter a residence and/or mailing address. CalATERS uses the information captured on the employee profile at the time a claim is first initiated. To check the address captured on a claim, log-in to your CalATERS account, open the claim, then select the "Info" button to see claim details.

Question: How do I re-set my password?

Answer: At the CalATERS Global log-in screen, there is an option under the User ID and Password field titled "Having trouble logging in? Click here for assistance". Click this link, then on the popup click "Password Retrieval Request" to search using your full first and last names. The user will receive an email with a new temporary password to the email address listed on their user profile. Change Your Password Instructions are also available from the employee's [department travel section](#) or on the CalATERS Global website by clicking on the Get Started and New User Registration link under the Global Instructions heading, then by clicking on the [Change Your Password](#) link.