

# Update Your Profile

The Profile contains information unique to each CalATERS user, such as e-mail address, collective bargaining designation and unit, mailing address, residence address and default approver (person designated as your first level approver for Travel Advances and Expense Reimbursements).

When employees perform New User Registration they are initially required to update their Profile information. These instructions are used to perform any necessary ongoing Profile updates.

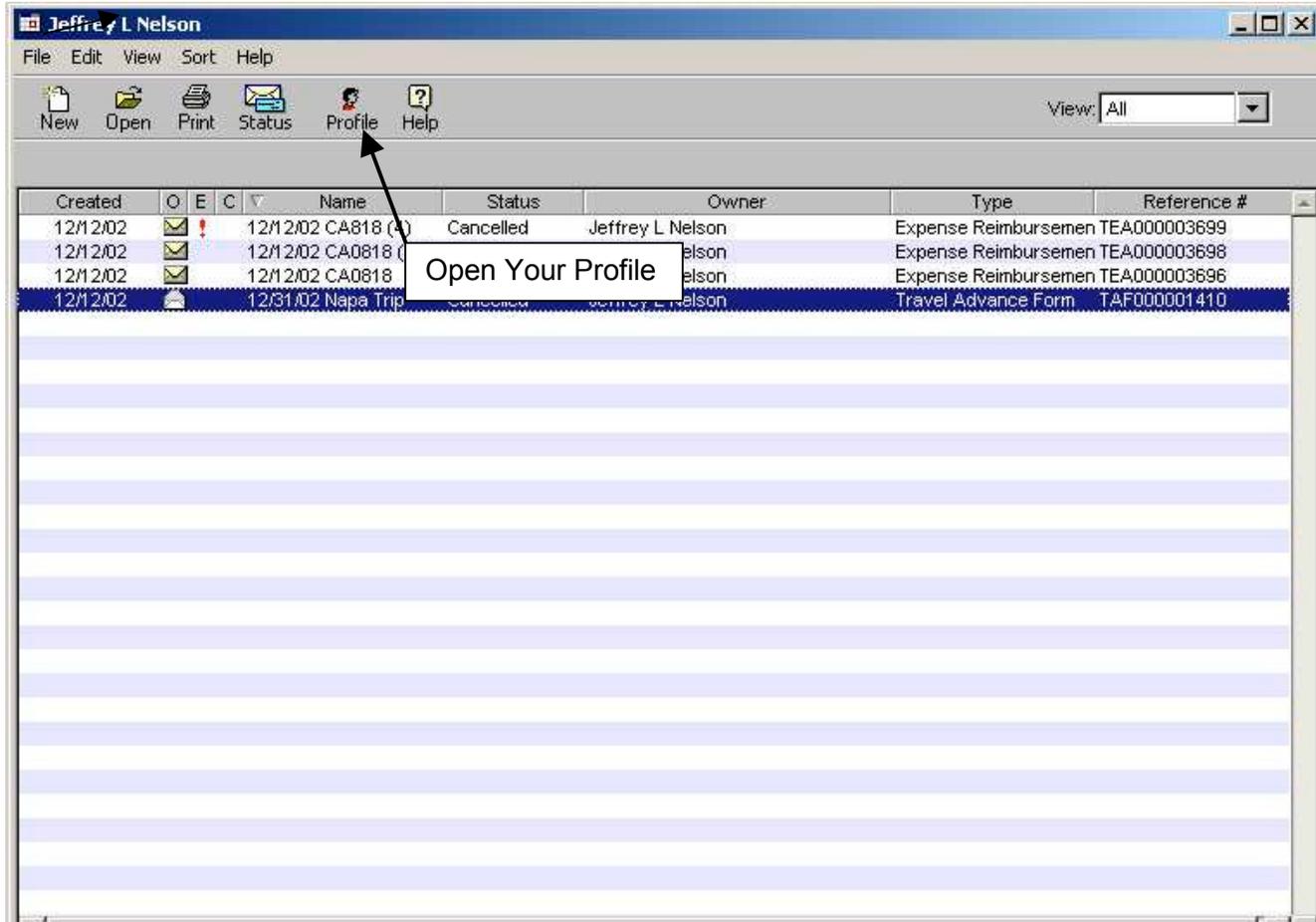
These instructions will assist you in updating your own Profile.

Additional options accessed from the Profile are also explained, including selecting or removing a Preparer or Submitter and changing a password.

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## I. Open Your Profile

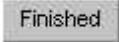
To open your **Profile**, click the  button from your Work Queue.

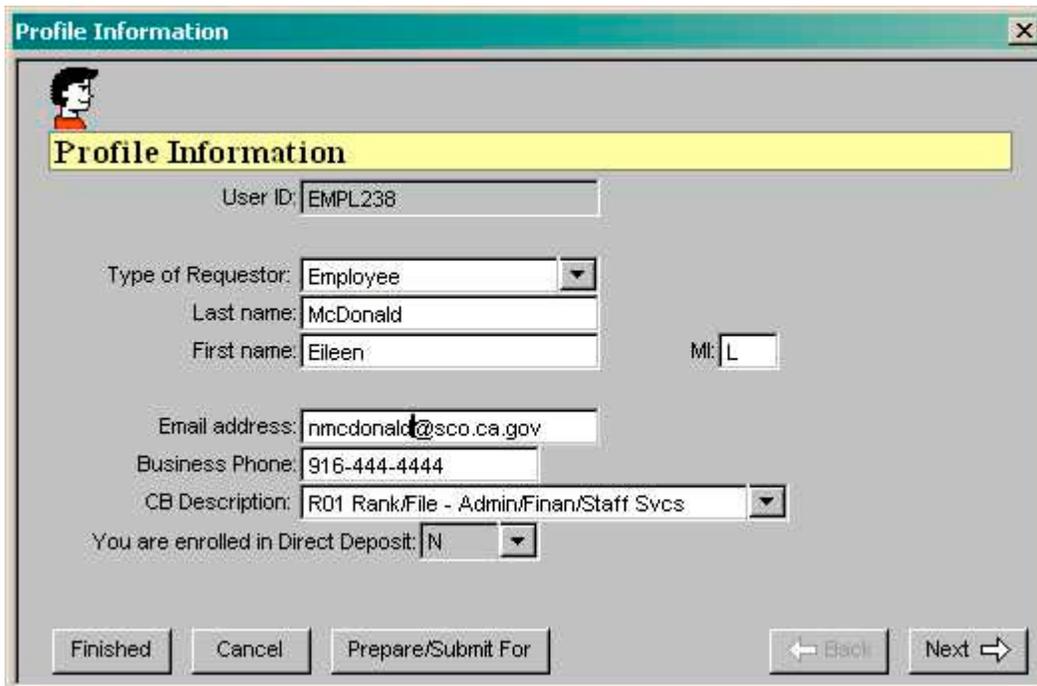


## II. Profile Information

The **Profile Information** screen appears.

You can move from one field to another by tabbing or placing your cursor in a field and clicking the left mouse button. Update any necessary fields. Refer to **Definitions** on the CalATERS web site for information on specific fields.

When you have completed updating information on this screen, click the  button to go to the next screen in your Profile, or click  to update and exit the Profile.



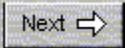
The screenshot shows a web browser window titled "Profile Information". The window contains a form with the following fields and values:

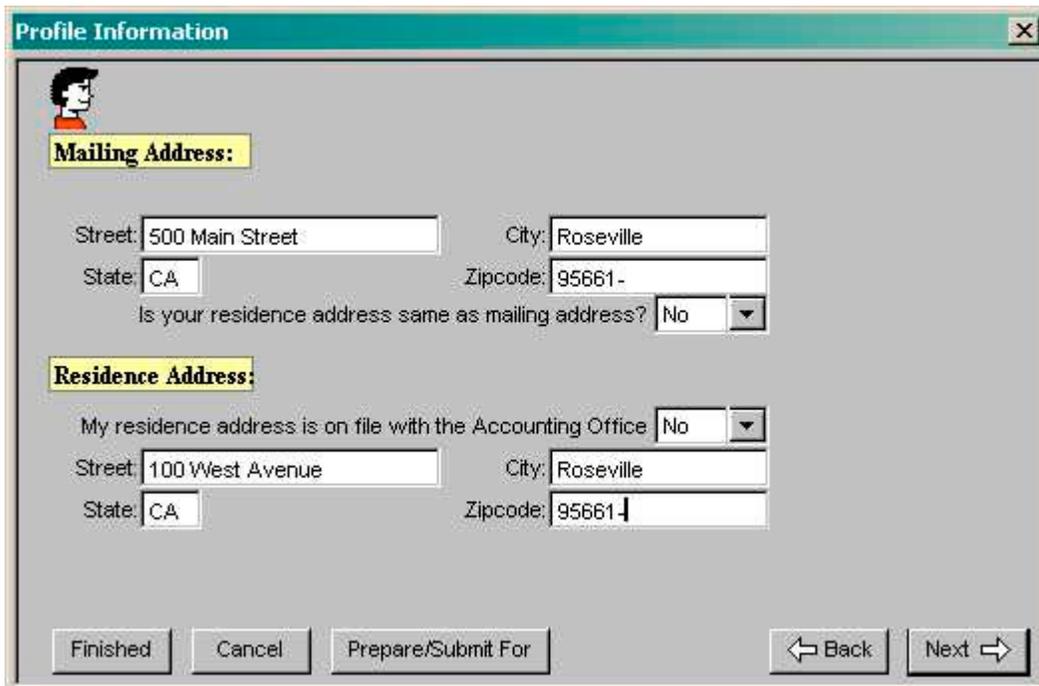
- User ID: EMPL238
- Type of Requestor: Employee (dropdown menu)
- Last name: McDonald
- First name: Eileen
- Mi: L
- Email address: nmcdonald@sco.ca.gov
- Business Phone: 916-444-4444
- CB Description: R01 Rank/File - Admin/Finan/Staff Svcs (dropdown menu)
- You are enrolled in Direct Deposit: N (dropdown menu)

At the bottom of the form, there are five buttons: "Finished", "Cancel", "Prepare/Submit For", "Back", and "Next".

### III. Mailing and Residence Address

Update information in **Mailing Address**. It is important that the mailing address is correct. This address is used to send reimbursement checks to you if you are not on direct deposit. The **Residence Address** fields will display only when your residence address is different than your mailing address and is not on file with your Accounting Office. Key or change information in the displayed fields as appropriate.

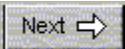
When you have completed updating information on this screen, click the  button to go to the next screen in your Profile, or click  to update and exit the Profile.

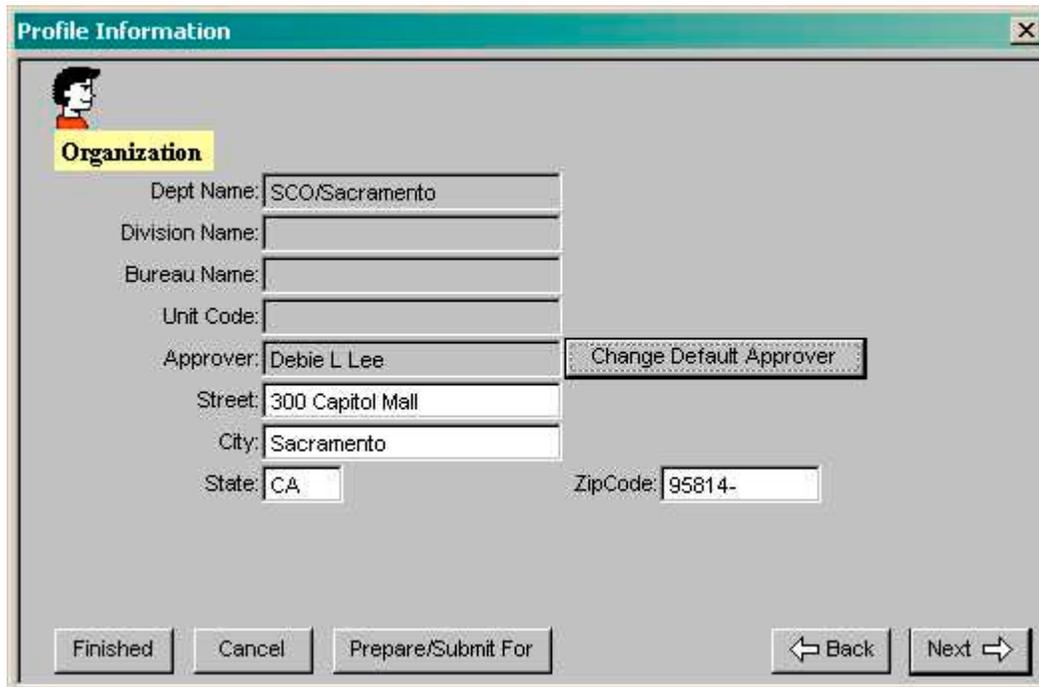


The screenshot shows a window titled "Profile Information" with a close button (X) in the top right corner. On the left side, there is a small cartoon icon of a person's head. The form is divided into two main sections: "Mailing Address:" and "Residence Address:". The "Mailing Address:" section includes text boxes for "Street:" (500 Main Street), "City:" (Roseville), "State:" (CA), and "Zipcode:" (95661-). Below these is a dropdown menu for "Is your residence address same as mailing address?" with "No" selected. The "Residence Address:" section includes a dropdown menu for "My residence address is on file with the Accounting Office" with "No" selected, and text boxes for "Street:" (100 West Avenue), "City:" (Roseville), "State:" (CA), and "Zipcode:" (95661-). At the bottom of the window, there are five buttons: "Finished", "Cancel", "Prepare/Submit For", "Back" (with a left arrow), and "Next" (with a right arrow).

#### IV. Organization

The **Organization** screen is used to change your **Default Approver** (person designated as the first level approver for Travel Advances and Expense Reimbursements) and work address. To change your Default Approver, see instructions below.

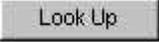
When you have completed updating information on this screen, click the  button to go to the next screen in your Profile, or click  to update and exit the Profile.

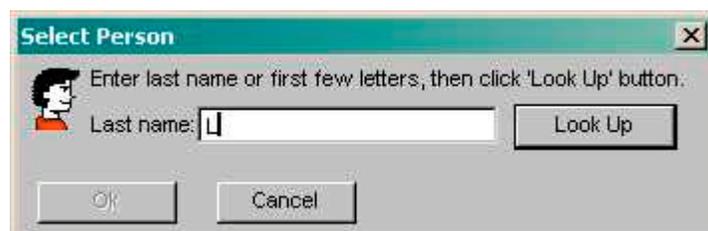


#### Change Approver

Your **Default Approver** is the first level Approver for your Expense Reimbursement and/or Travel Advance claims.

To change your Default Approver, click the  button.

Key in the last name of the Approver in the **Last Name** field and click the  button.

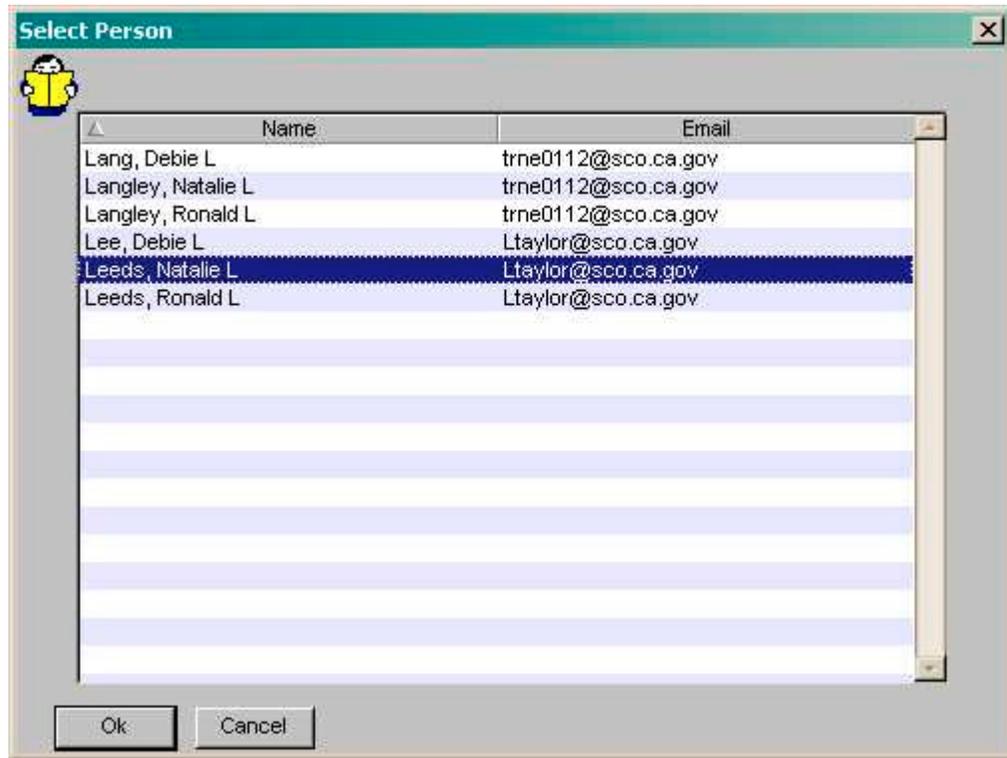


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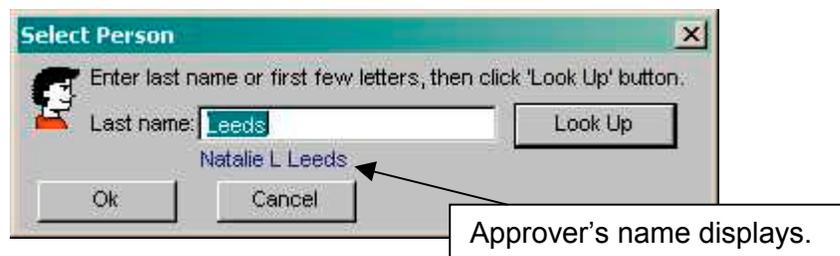
#### IV. Organization (continued)

##### Change Approver (continued)

Select a name from the list and click the  button.



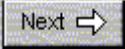
Confirm your selection and click the  button. The **Approver** field should now display the Approver's name.

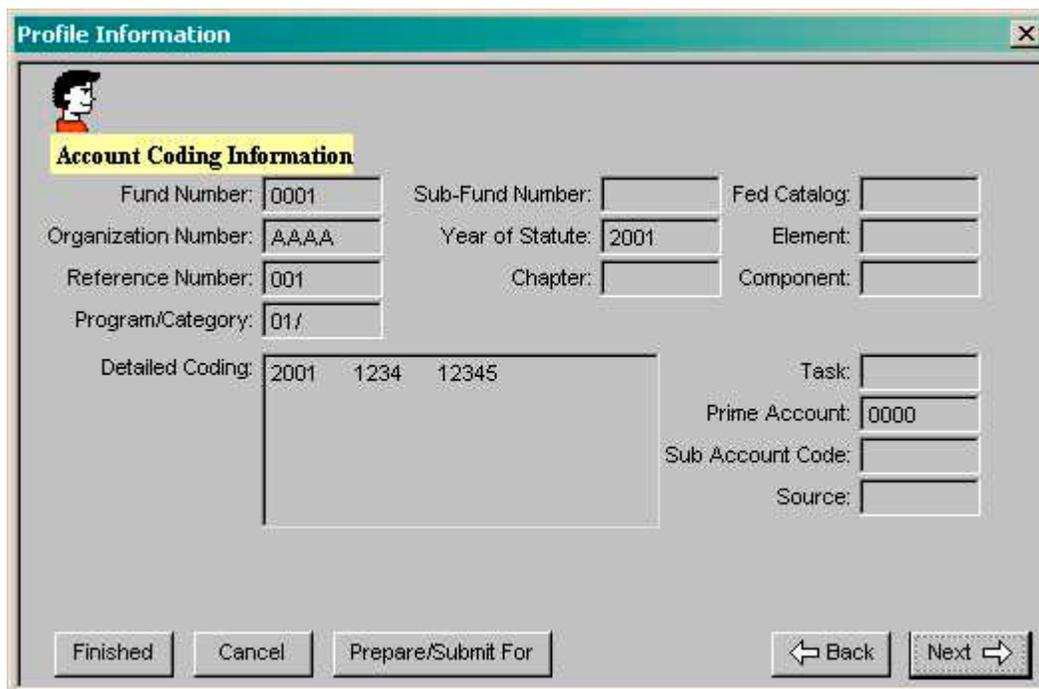


## V. Detailed Account Coding

You will not be able to modify any information on the **Detailed Account Coding** screen. This information is updated and maintained by your department and is used to determine the default-funding source for your Expense Reimbursements.

Note: Your department will modify some fields on a fiscal year basis. Some fields may be blank.

Click the  button for the next screen in your Profile or click  to exit the Profile.



The screenshot shows a window titled "Profile Information" with a close button (X) in the top right corner. Inside the window, there is a small icon of a person's head and shoulders. Below the icon, the text "Account Coding Information" is displayed in a yellow highlighted box. The form contains several input fields and a large text area:

- Fund Number: 0001
- Sub-Fund Number: (empty)
- Fed Catalog: (empty)
- Organization Number: A.A.A.A.
- Year of Statute: 2001
- Element: (empty)
- Reference Number: 001
- Chapter: (empty)
- Component: (empty)
- Program/Category: 01/
- Detailed Coding: 2001 1234 12345
- Task: (empty)
- Prime Account: 0000
- Sub Account Code: (empty)
- Source: (empty)

At the bottom of the window, there are five buttons: "Finished", "Cancel", "Prepare/Submit For", "Back" (with a left arrow), and "Next" (with a right arrow).

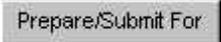
## VI. Long Term Assignment (LTA)

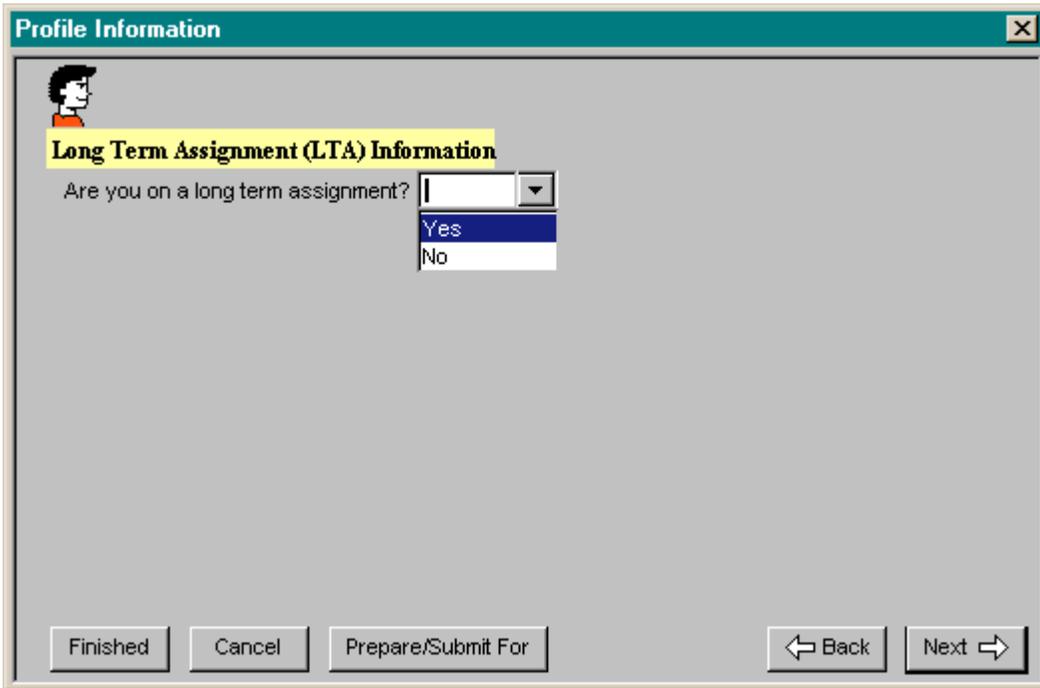
A long-term assignment is a pre-approved business trip of more than 30 consecutive days.

If you are on a long-term assignment, click the down arrow  and select **Yes** and continue on to the next page for more LTA information.

If you are not on a long-term assignment, click the  button to update and exit the Profile.

If you need to designate a Submitter or Preparer (person designated to submit or prepare Expense Reimbursement or Travel Advance forms for you) or change your password, go to section **VII**.

**Options** for an explanation of the options available through the  button.



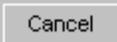
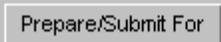
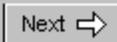
**Profile Information**



**Long Term Assignment (LTA) Information**

Are you on a long term assignment?  

Yes  
No

## VI. Long Term Assignment (LTA) (continued)

If you answered **Yes**, you are on a long-term assignment, update any remaining LTA fields. Specific information on completing a LTA Expense Reimbursement can be found in the [Long Term Assignment](#) instructions on the CalATERS web site.

To select a **Start Date** and **End Date**, key dates into the fields or click on the calendar button next to the fields. When the calendar appears, clicking on the arrows ◀ ▶ next to the calendar month, will display the month before (◀) or the month after (▶).

**Note:** If you are not on Direct Deposit and payments are to be mailed to the **LTA Residence Address**, change/update the information on the **Mailing Address** screen (see section III. **Mailing and Residence Address**).

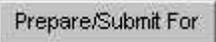
When you have completed updating information on this screen, click  to update and exit the Profile or go to section VII. **Options** for an explanation of the options available through the  button.

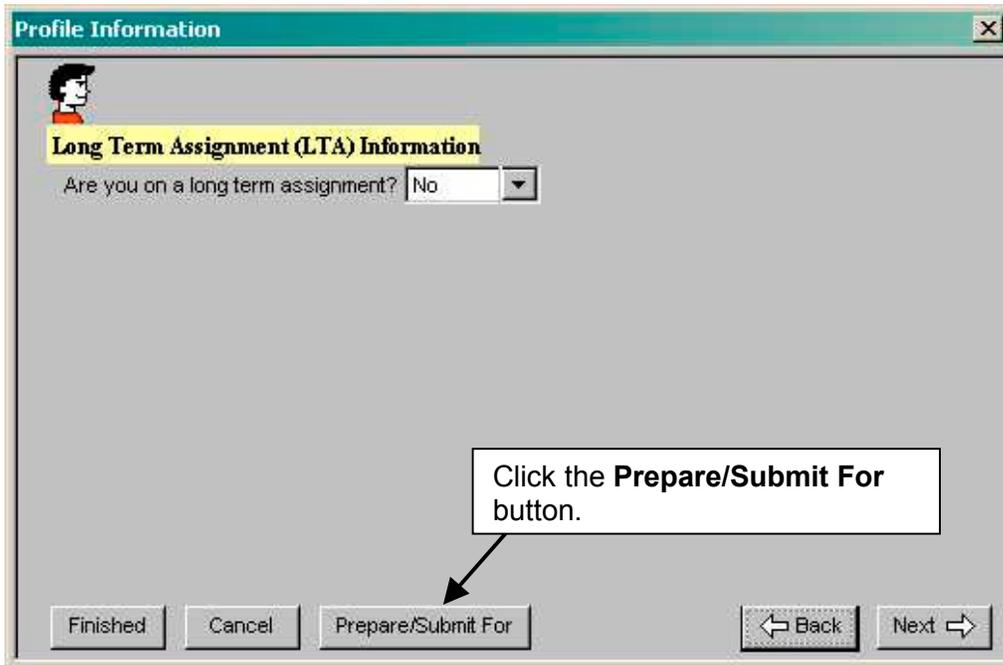
The screenshot shows a web application window titled "Profile Information". It contains several sections:

- Long Term Assignment (LTA) Information:** A dropdown menu for "Are you on a long term assignment?" is set to "Yes". Below it are date fields for "Start date:" (03/01/02) and "End date:" (01/31/03), each with a calendar icon.
- LTA Residence address:** Fields for "Street:" (LTA Street Address), "City:" (LTA City), "State:" (CA), and "ZipCode:" (-).
- Mailing address:** Fields for "Street Address", "City", and "ZipCode:" (-).

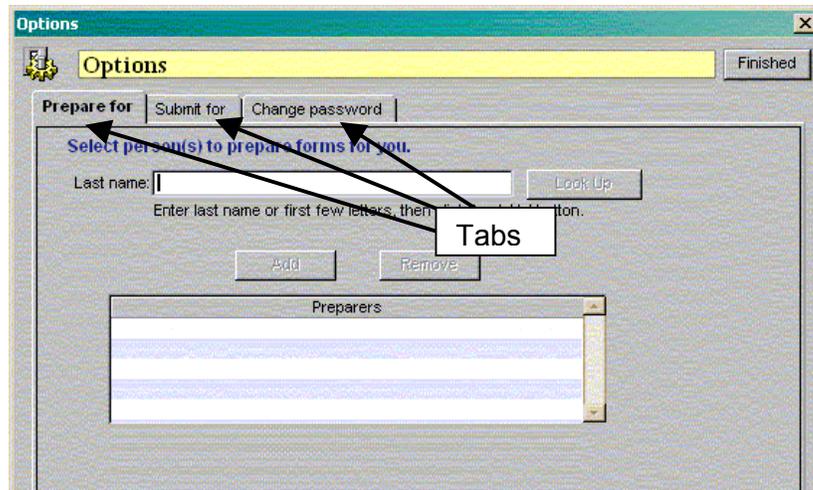
A calendar for January 2003 is displayed in the center, with the date 31 highlighted. At the bottom of the window are buttons for "Finished", "Cancel", "Prepare/Submit For", "Back", and "Next".

## VII. Options

Click the  button.



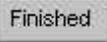
The **Options** window appears with three tabs that are explained below.



**Prepare For:** This tab is used to assign a Preparer (a person designated to prepare Expense Reimbursement and Travel Advance forms for you).

**Submit For:** This tab is used to assign a Submitter (a person designated to prepare and submit Expense Reimbursement and Travel Advance forms for you).

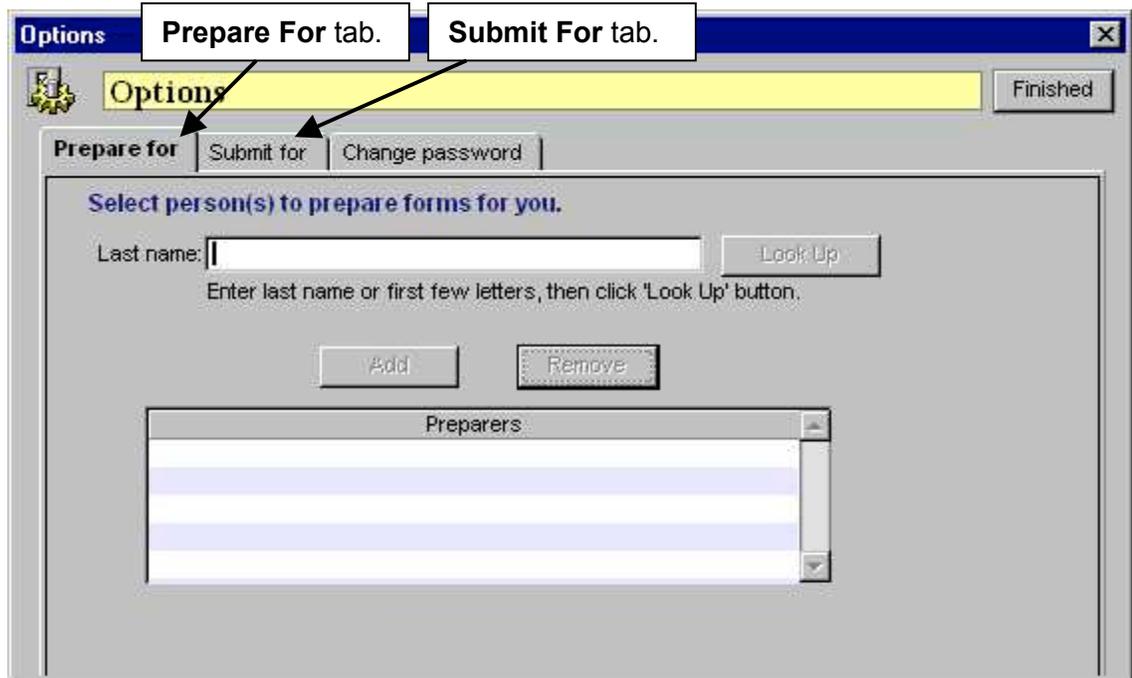
**Change Password:** This tab is used to change your CalATERS password.

If you do not need to perform any of the functions described, click the  button at the top right to exit **Options**, then click the  button on the bottom left of the next screen to update and exit the Profile.

## VII. Options (continued)

### A. Prepare For/ Submit For Tabs

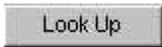
To select someone as your Preparer or Submitter, click the appropriate tab, **Prepare For** or **Submit For**. Once the tab is selected, the instructions for establishing a Preparer or Submitter are the same. In this example, we will select **Prepare For**.



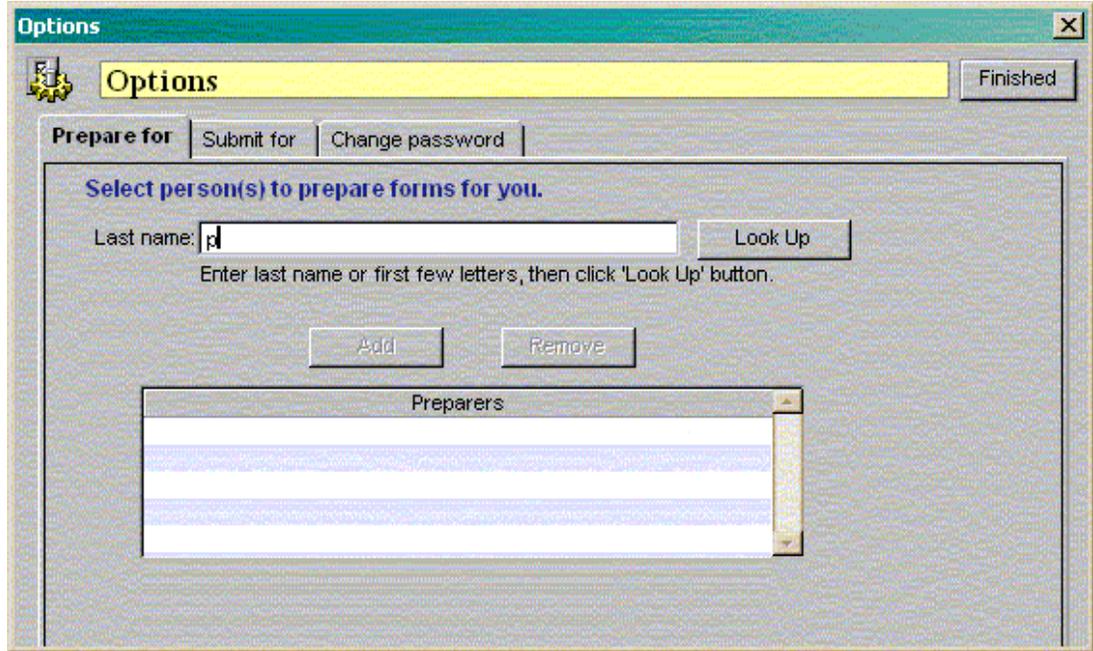
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VII. Options (continued)  
 A. Prepare For/ Submit For Tabs (continued)

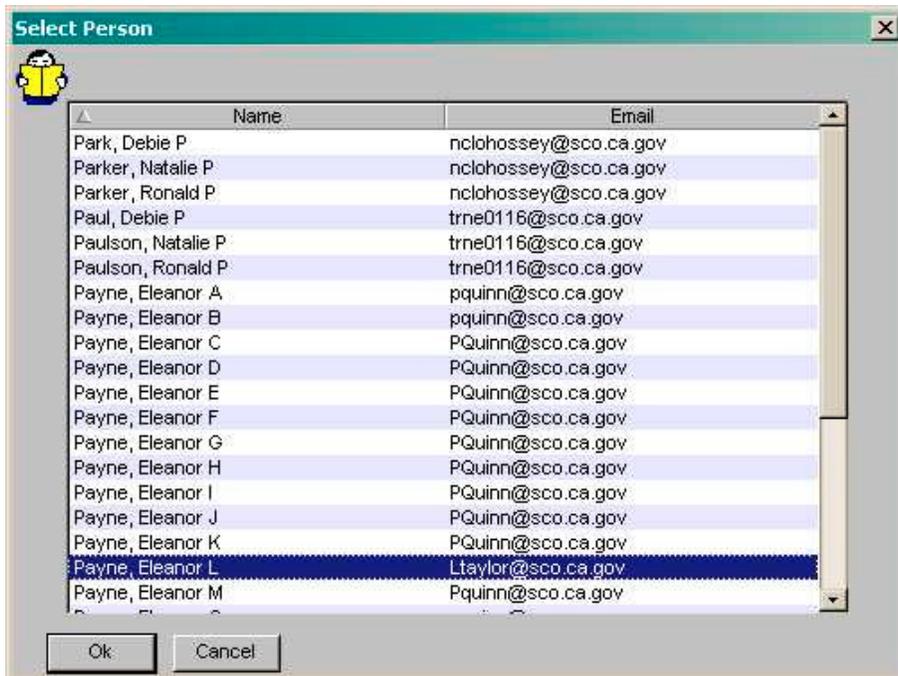
Key the last name of the Preparer in the **Last Name** field, then click the



button.

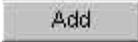


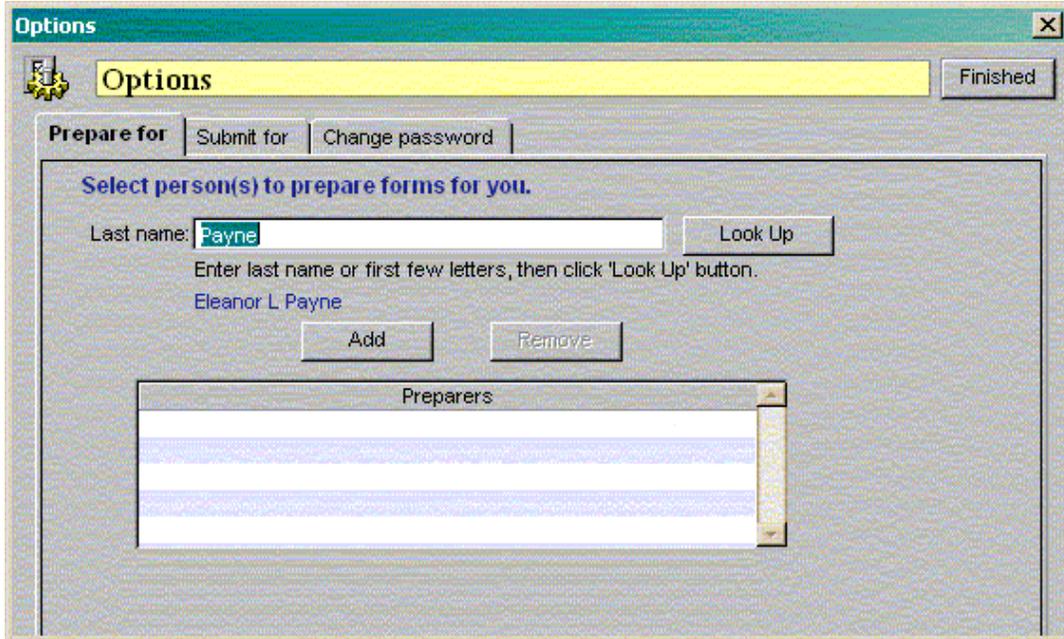
Click on a name, then click the  button. (Note: Only registered CalATERS users will appear on the "Look Up" listing. If a name does not appear, the person may not be a registered user.)



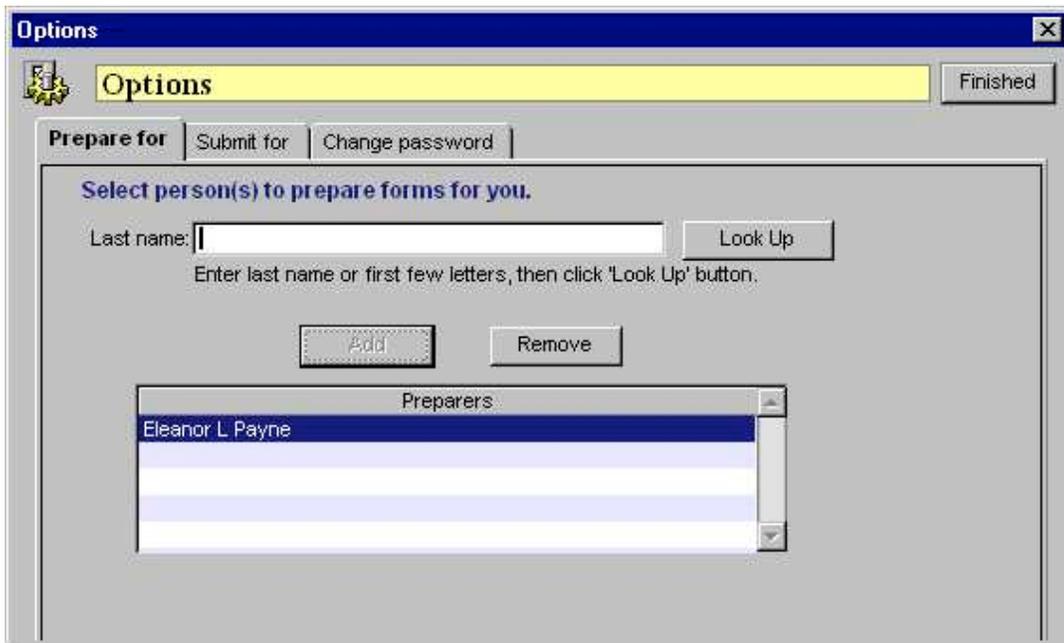
**VII. Options (continued)**

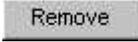
**A. Prepare For/ Submit For Tabs (continued)**

Click the  button to add the Preparer to your "Preparers" list.



The selected name will appear in the **Preparers** list.



Repeat the instructions on pages 11 - 13 to select another Preparer or Submitter. Use the  button to remove names from your list.

## VII. Options (continued)

### B. Change Password

Passwords expire after 45 days and will require a change. The CalATERS system will prompt you to change your password when the 45 days have elapsed. However, you can also change your password at any time. Your password must have a minimum of 4 characters (either letters or numbers) and a maximum of 14 characters.

To change your password, key your current password, your new password, then re-enter your new password. Click the **Submit Password Change Request** button. Your new password will now be in effect.

Click the **Finished** button at the top right of the screen to exit **Options**, then click the **Finished** button at the bottom left of the next screen to exit and update the Profile.

The screenshot shows a web application window titled "Options". At the top right of the window is a "Finished" button. Below the title bar is a yellow banner with the word "Options" and another "Finished" button. There are three tabs: "Prepare for", "Submit for", and "Change password". The "Change password" tab is selected. The main content area has the heading "Change your sign in password." with a key icon. Below this are three input fields: "Current password:", "New password:", and "Re-enter password:". A note below the "New password" field says "Maximum of 14 alphanumeric characters." At the bottom of the form is a "Submit Password Change Request" button.