

## View User's 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 the first level approver for Travel Advances and Expense Reimbursements).

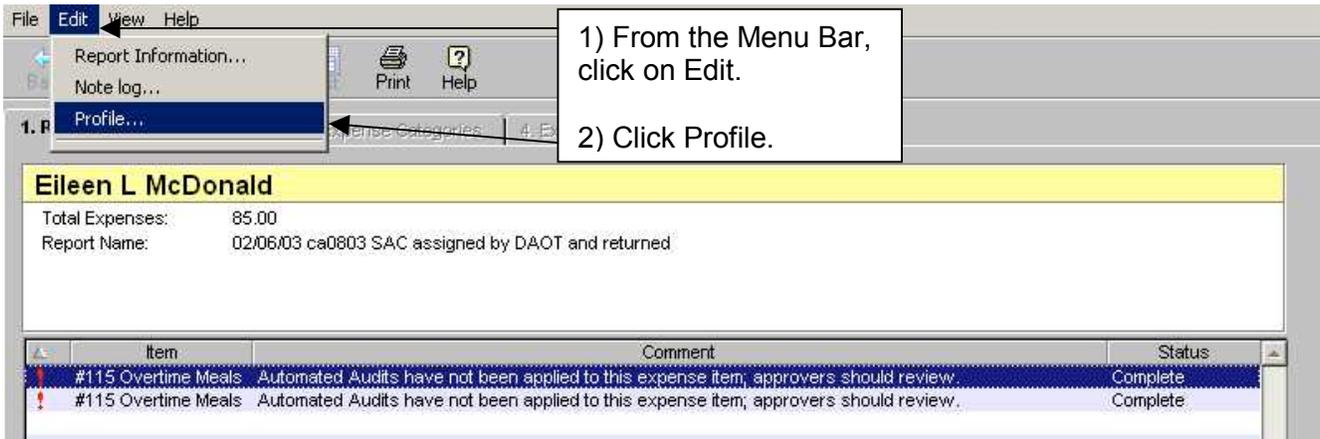
These instructions will assist Approvers and Accounting Staff in viewing an employee's Profile while reviewing an Expense Reimbursement or Travel Advance form. This information is also viewable to Submitters and Preparers while creating an Expense Reimbursement or Travel Advance form for others.

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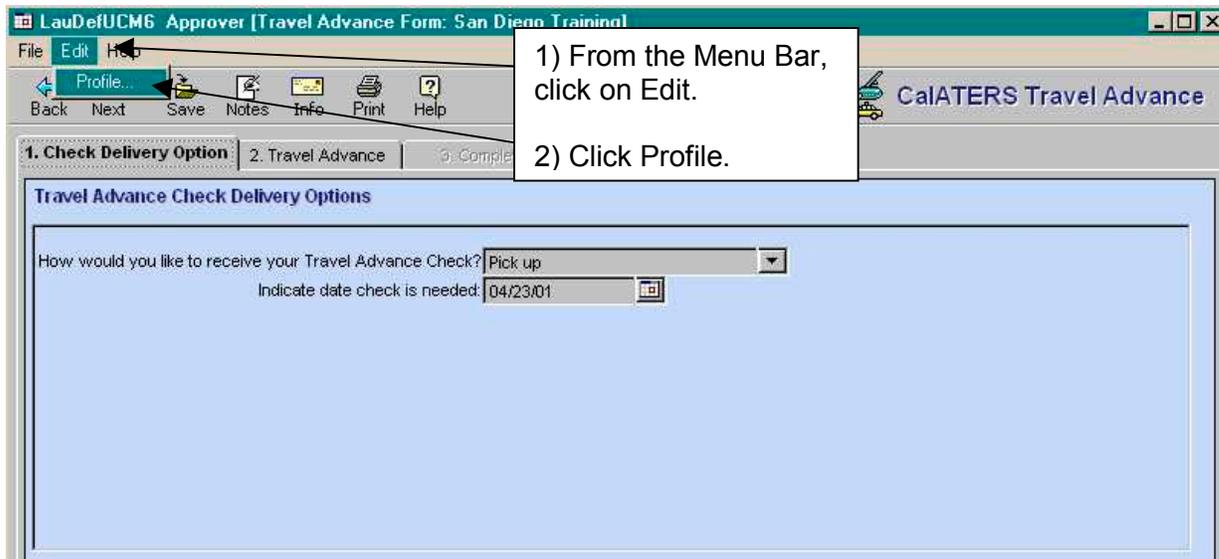
## I. Viewing an Employee's Profile

To open an employee's Profile when reviewing an Expense Reimbursement or Travel Advance form, click **Edit** from the **Menu Bar**, then click **Profile**.

Example: To view an employee's Profile from an Expense Reimbursement form.



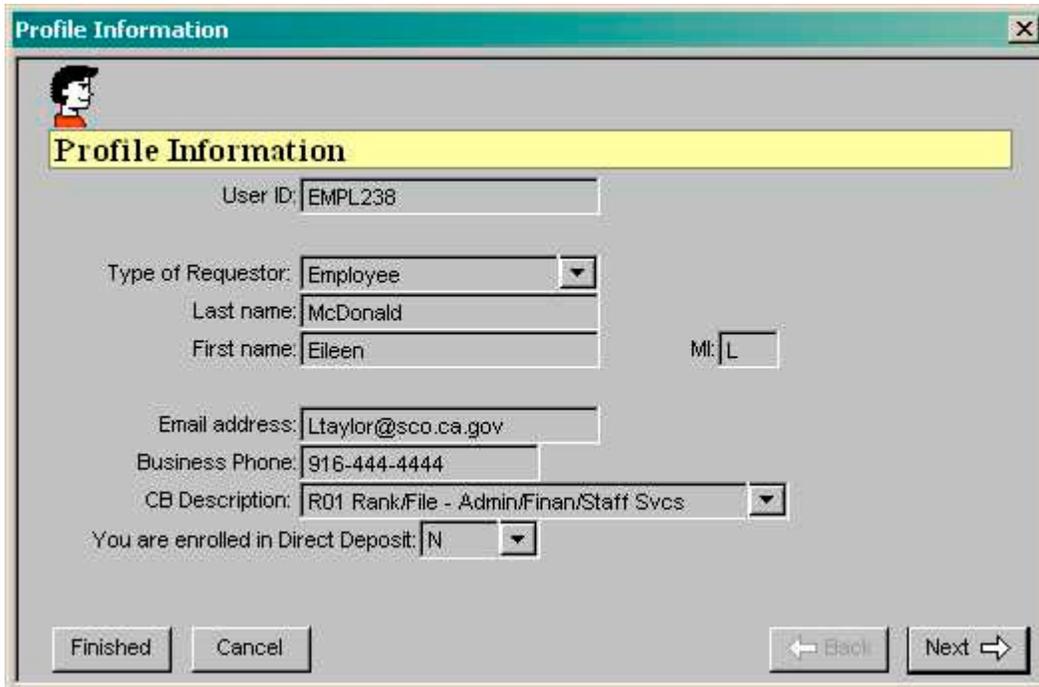
Example: To view an employee's Profile from a Travel Advance form.



## II. Profile Information

The first screen, **Profile Information** appears. Refer to **Definitions** on the CalATERS web site for information on specific fields.

When you have completed reviewing this screen, click the  button to go to the next screen in the Profile, or click  to exit the Profile and return to the Expense Reimbursement or Travel Advance form.



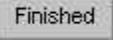
The screenshot shows a web browser window titled "Profile Information". The form contains the following fields and values:

- User ID: EMPL238
- Type of Requestor: Employee (dropdown menu)
- Last name: McDonald
- First name: Eileen
- Mi: L
- Email address: Ltaylor@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 four buttons: "Finished", "Cancel", "Back" (with a left arrow), and "Next" (with a right arrow).

### III. Mailing and Residence Address

Each employee should have a **Mailing Address**. This is the address used to mail Expense Reimbursement checks when the employee is not on direct deposit. **Residence Address** fields will also display when the residence address is different from the mailing address and is not on file with the Accounting Office.

When you have completed viewing information on this screen, click the  button to go to the next screen in the Profile, or click  to exit the Profile and return to the Expense Reimbursement or Travel Advance form.



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 "Mailing Address:" is displayed in a yellow box. The form contains the following fields:

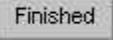
Street:	500 Main Street	City:	Roseville
State:	CA	Zipcode:	95661-

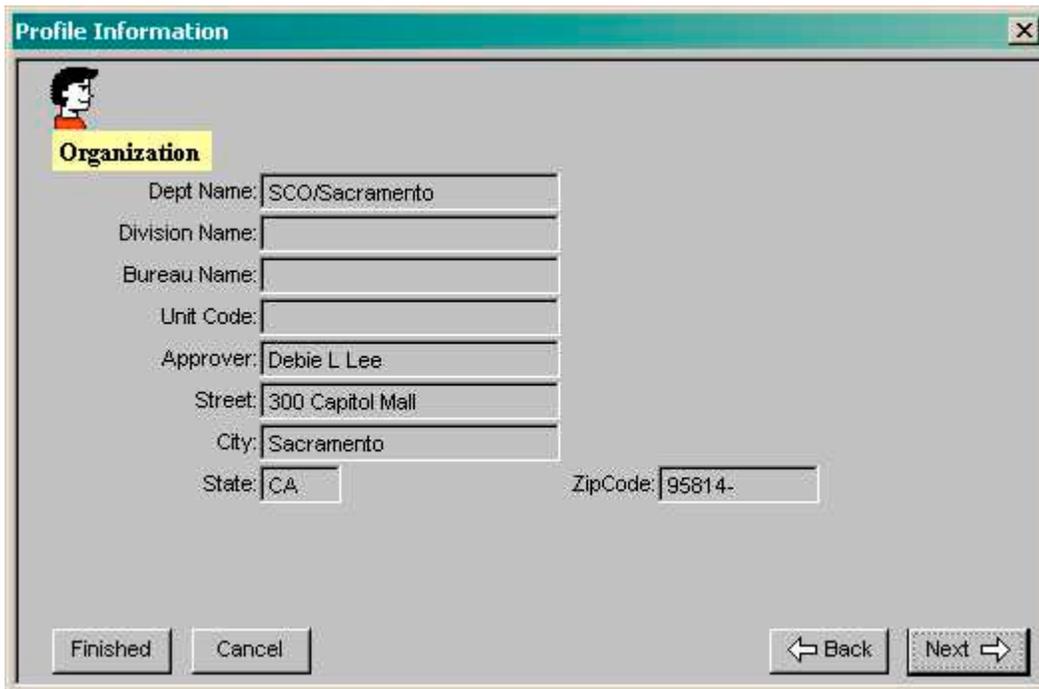
Below these fields is a question: "Is your residence address same as mailing address?" followed by a dropdown menu with "Yes" selected.

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

#### IV. Organization

The **Organization** screen displays the employee's **Dept Name**. The **Division Name**, **Bureau Name**, and **Unit Code** will display if the department requires these fields. The **Approver** (person designated as the first level approver for Travel Advances and Expense Reimbursements) and work address also display.

When you have completed viewing information on this screen, click the  button to go to the next screen in the Profile, or click  to exit the Profile and return to the Expense Reimbursement or Travel Advance form.



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 word "Organization" is displayed in a yellow box. The form contains the following fields:

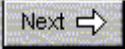
Dept Name:	SCO/Sacramento
Division Name:	
Bureau Name:	
Unit Code:	
Approver:	Debie L Lee
Street:	300 Capitol Mall
City:	Sacramento
State:	CA
ZipCode:	95814-

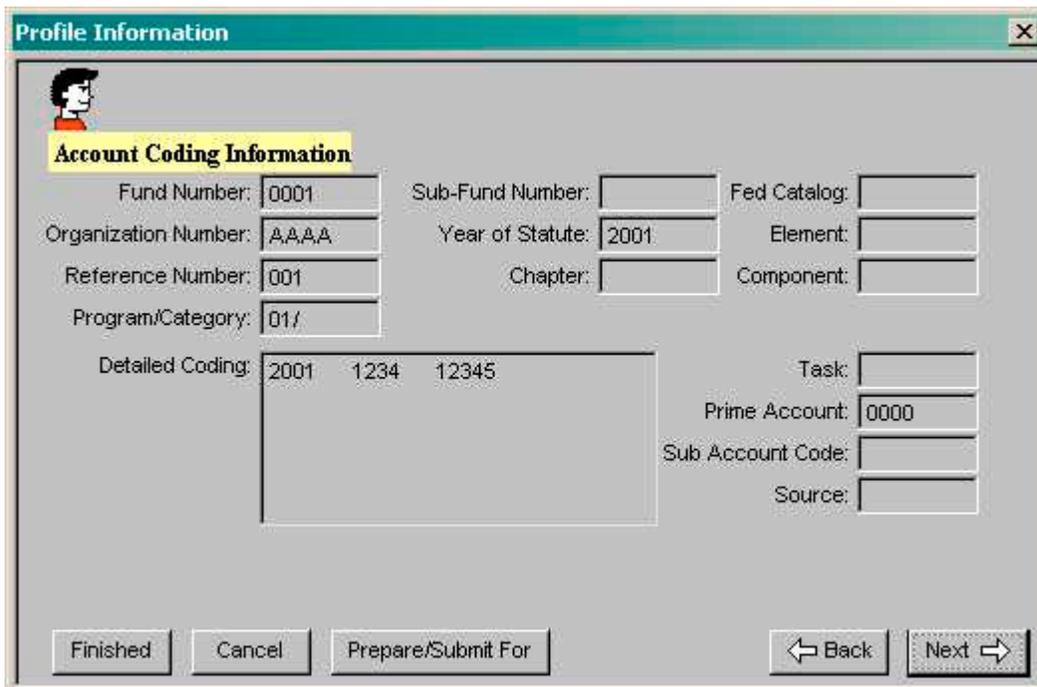
At the bottom of the window, there are four buttons: "Finished", "Cancel", "Back" (with a left arrow), and "Next" (with a right arrow).

## V. Detailed Account Coding

The **Detailed Account Coding** fields are updated and maintained by your department's CalATERS System Administrator. These fields are used to determine the default-funding source for the employee's 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 the Profile or click  to exit the Profile and return to the Expense Reimbursement or Travel Advance form.



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

- 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", and "Next". The "Next" button is highlighted with a grey background and a right-pointing arrow.

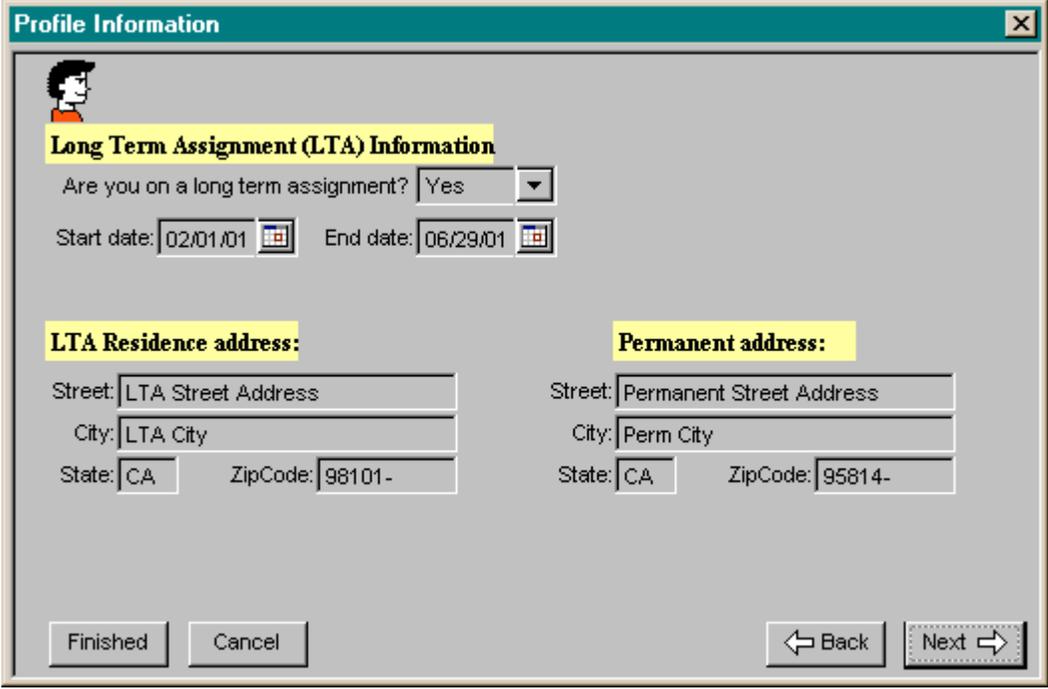
## VI. Long Term Assignment (LTA)

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

If the employee is not on a long-term assignment, **No** will display or the field may be left blank. If the employee is on a long-term assignment, **Yes** will be selected and additional fields will display.

**Note:** Expense Reimbursement checks are sent to the address on the **Mailing Address** screen, not the **LTA Residence Address** or the **LTA Permanent Address**.

When you have completed viewing information on this screen, click the  button to exit the Profile and return to the Expense Reimbursement or Travel Advance form.



The screenshot shows a window titled "Profile Information" with a close button in the top right corner. On the left side, there is a small icon of a person's head and shoulders. The main content area is divided into sections. The first section is titled "Long Term Assignment (LTA) Information" and contains a dropdown menu for "Are you on a long term assignment?" with "Yes" selected. Below this are two date pickers: "Start date: 02/01/01" and "End date: 06/29/01". The second section is titled "LTA Residence address:" and contains three input fields: "Street: LTA Street Address", "City: LTA City", and "State: CA" with "ZipCode: 98101-". The third section is titled "Permanent address:" and contains three input fields: "Street: Permanent Street Address", "City: Perm City", and "State: CA" with "ZipCode: 95814-". At the bottom of the window, there are four buttons: "Finished", "Cancel", "Back" (with a left arrow), and "Next" (with a right arrow).