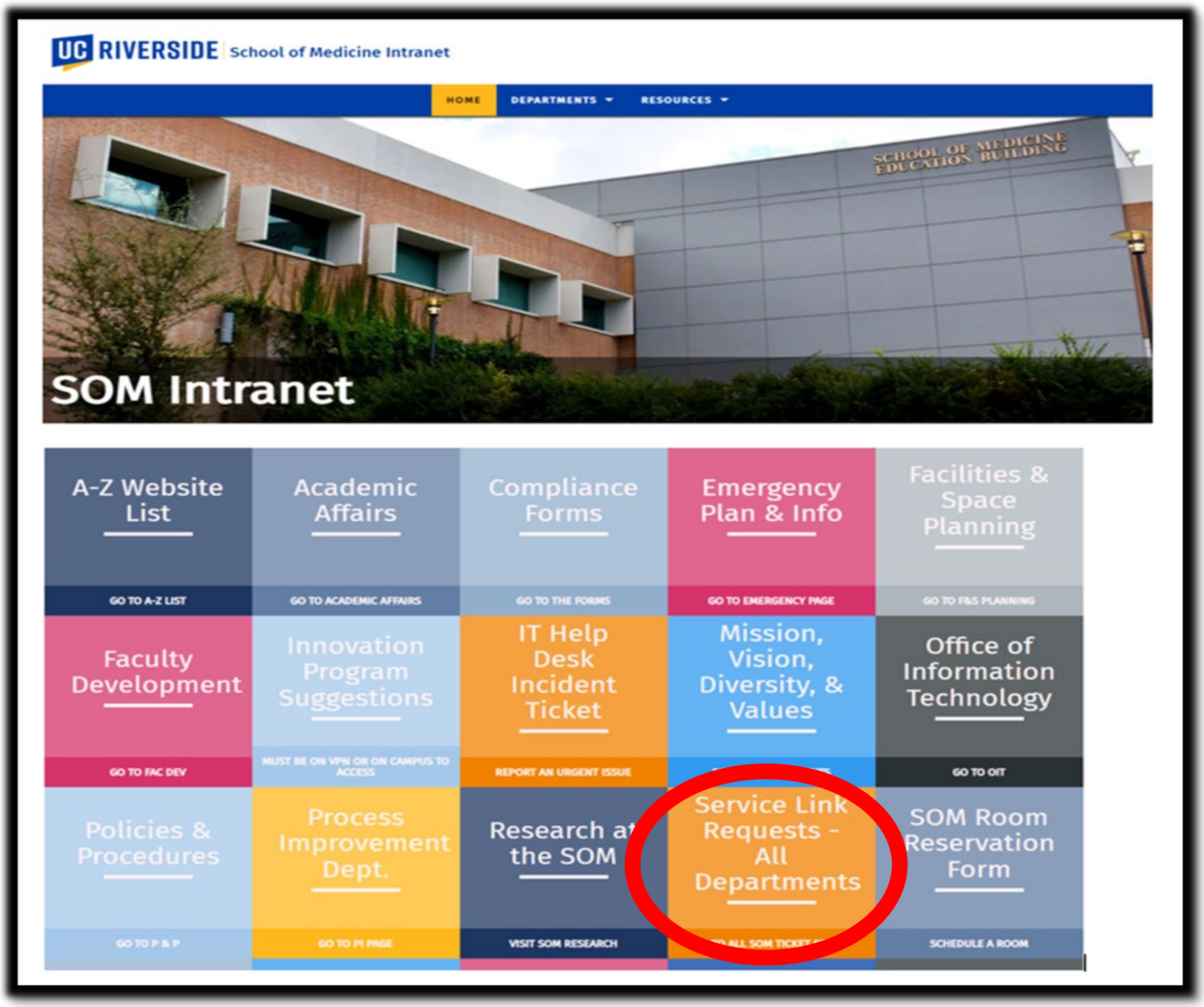
SOM Business Operations Reimbursement Request Form Process

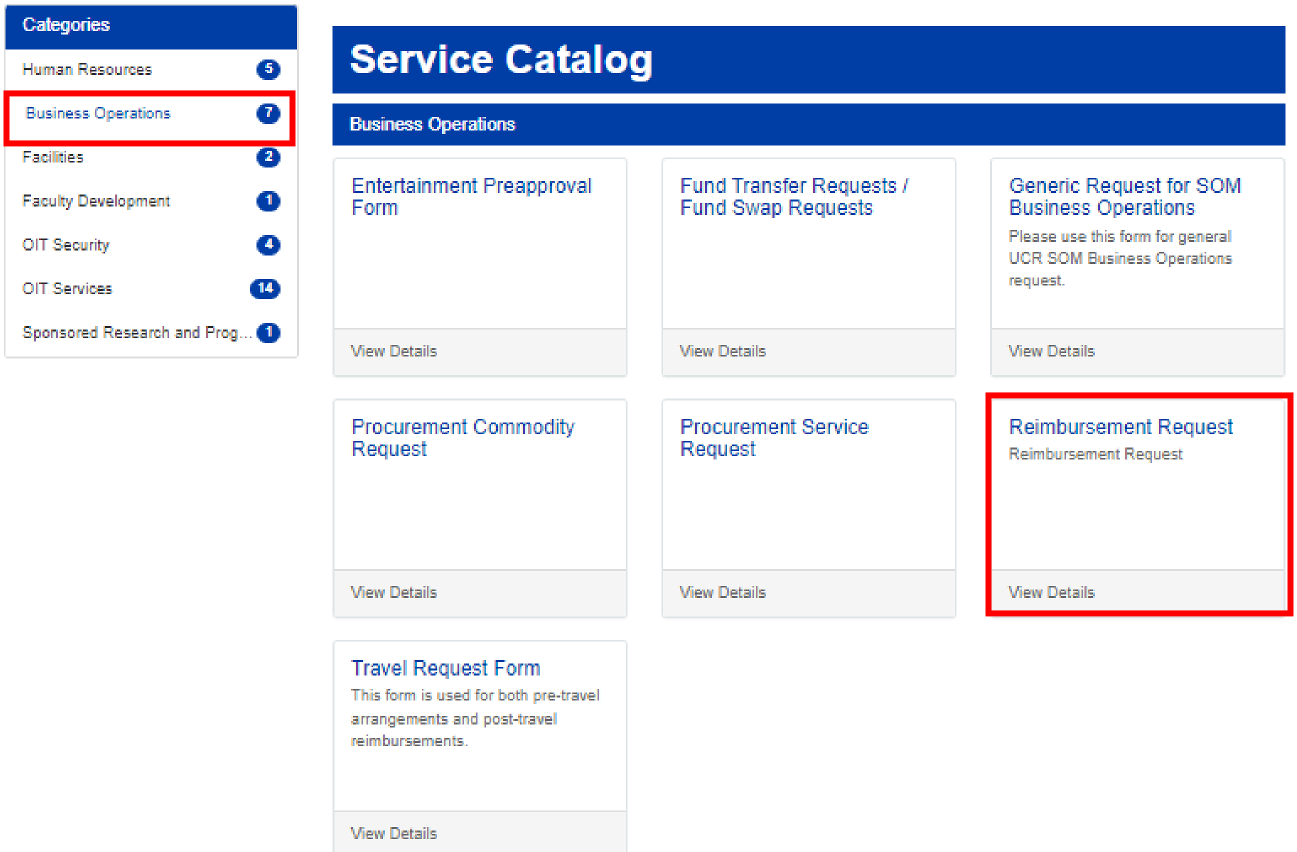
Purpose: The purpose of this document is to outline the process for entering a reimbursement request using the ServiceLink form. This process applies to but not limited to requests such as Faculty Development, Professional Development, Entertainment Reimbursement, and Gift Reimbursement. **This form is <u>not</u> to be used for Honorarium Payments, GME Reimbursements, Stipends, Check Requests or Travel Reimbursements.**

<u>Entering a request</u>

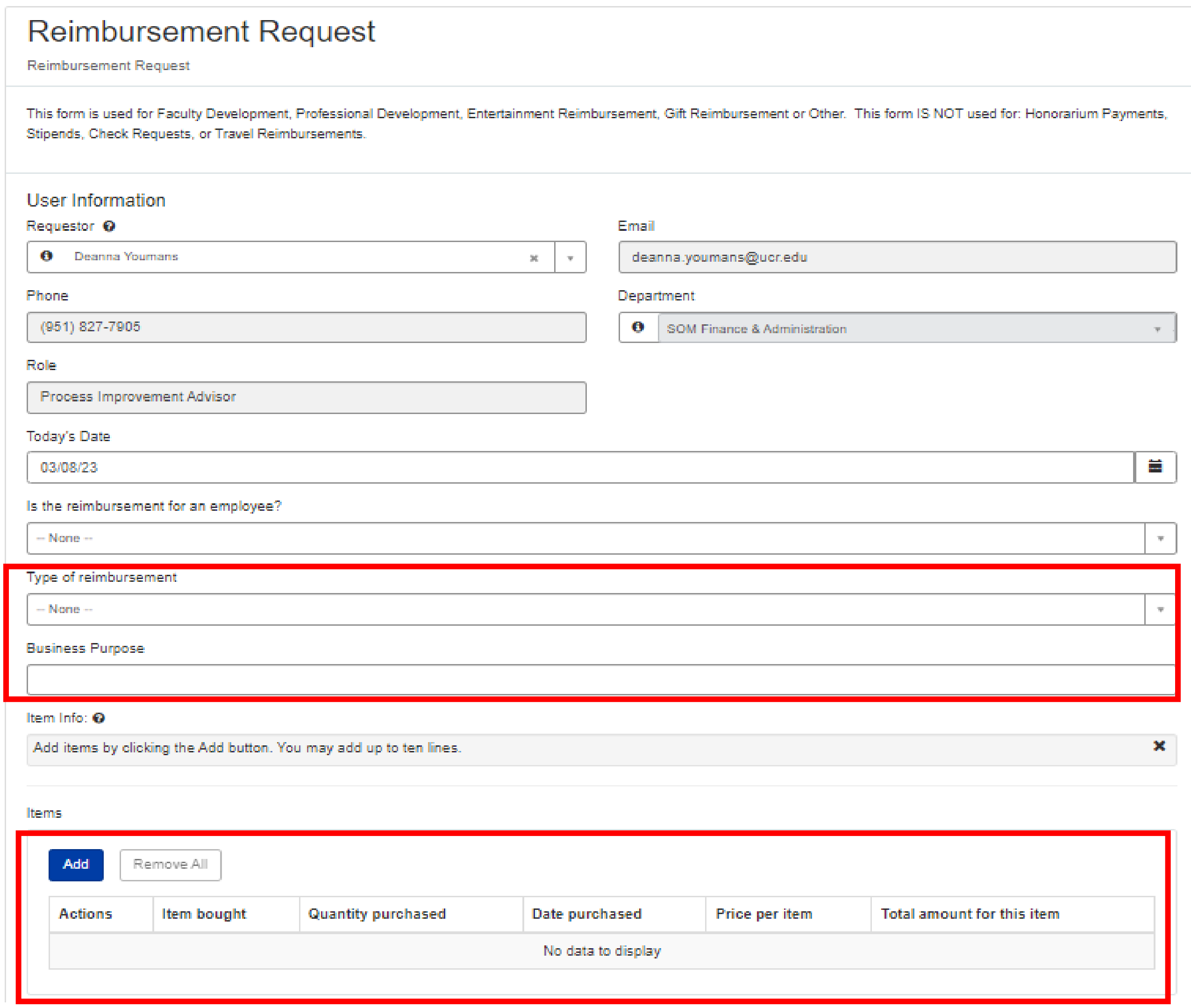
1. On the SOM Intranet Homepage https://medschoolintranet.ucr.edu/ select "ServiceLink Requests- All Departments"



2. In the Categories list, select “Business Operations.” In the Service Catalog section select “Reimbursement Request.”



3. Complete the form.
    a. The requestor details will auto populate.
    b. Enter information about the reimbursement, including type of reimbursement, business purpose, explanation of why procurement processes were not used (i.e. vendor did not accept a PO), item info, etc.



Reimbursement Request

Reimbursement Request

This form is used for Faculty Development, Professional Development, Entertainment Reimbursement, Gift Reimbursement or Other. This form IS NOT used for: Honorarium Payments, Stipends, Check Requests, or Travel Reimbursements.

User Information

Requestor: Deanna Youmans

Email: deanna.youmans@ucr.edu

Phone: (951) 827-7905

Department: SOM Finance & Administration

Role: Process Improvement Advisor

Today's Date: 03/08/23

Is the reimbursement for an employee?: -- None --

Type of reimbursement: -- None --

Business Purpose:

Item Info:

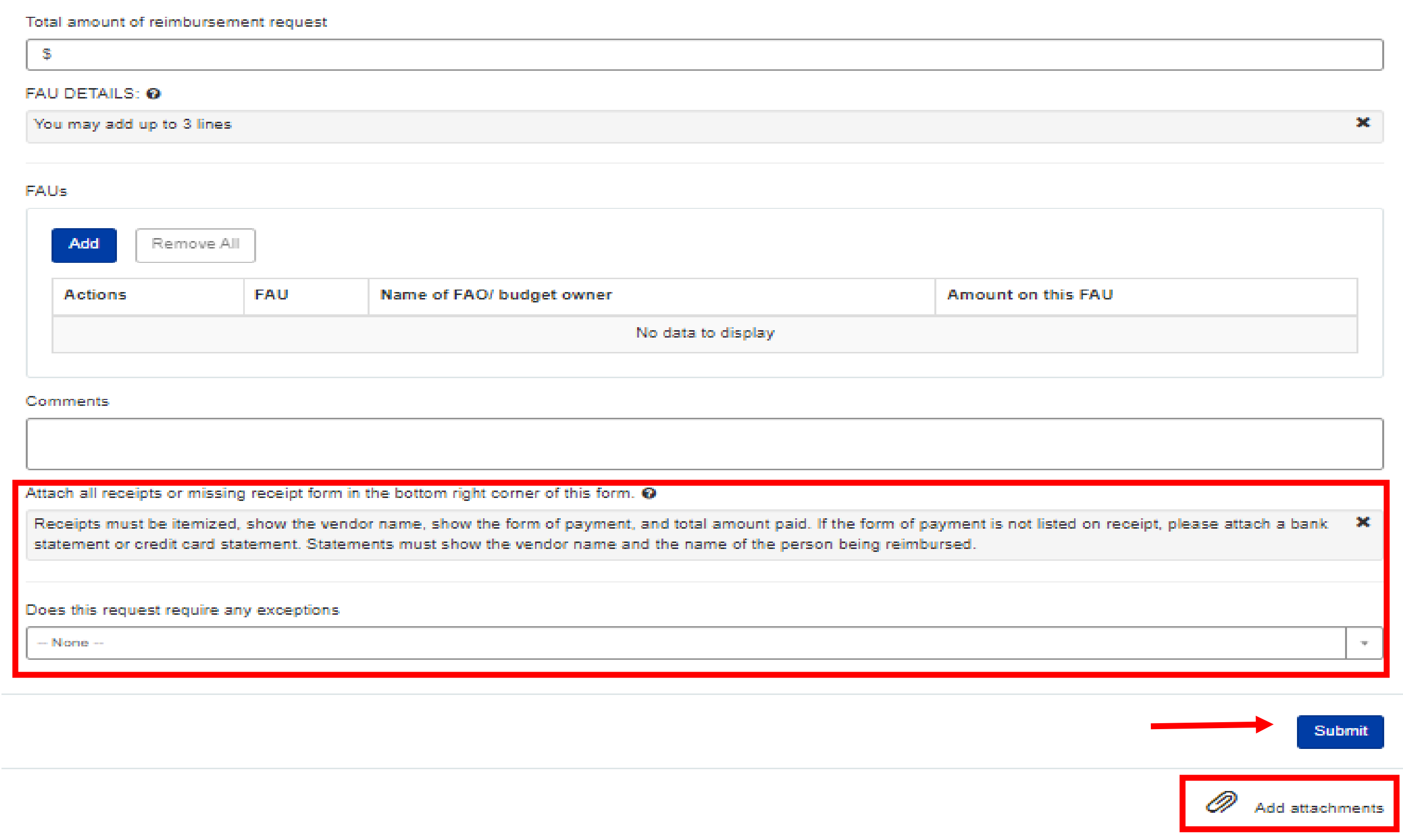
Add items by clicking the Add button. You may add up to ten lines.

Items

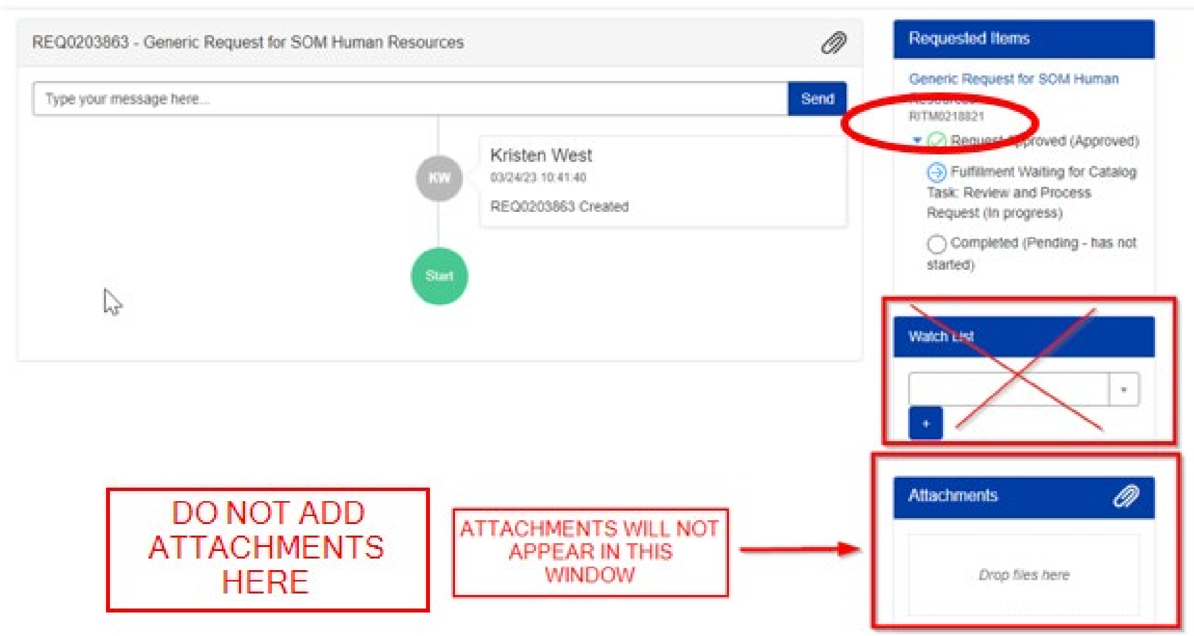
Add | Remove All

Actions	Item bought	Quantity purchased	Date purchased	Price per item	Total amount for this item
No data to display					

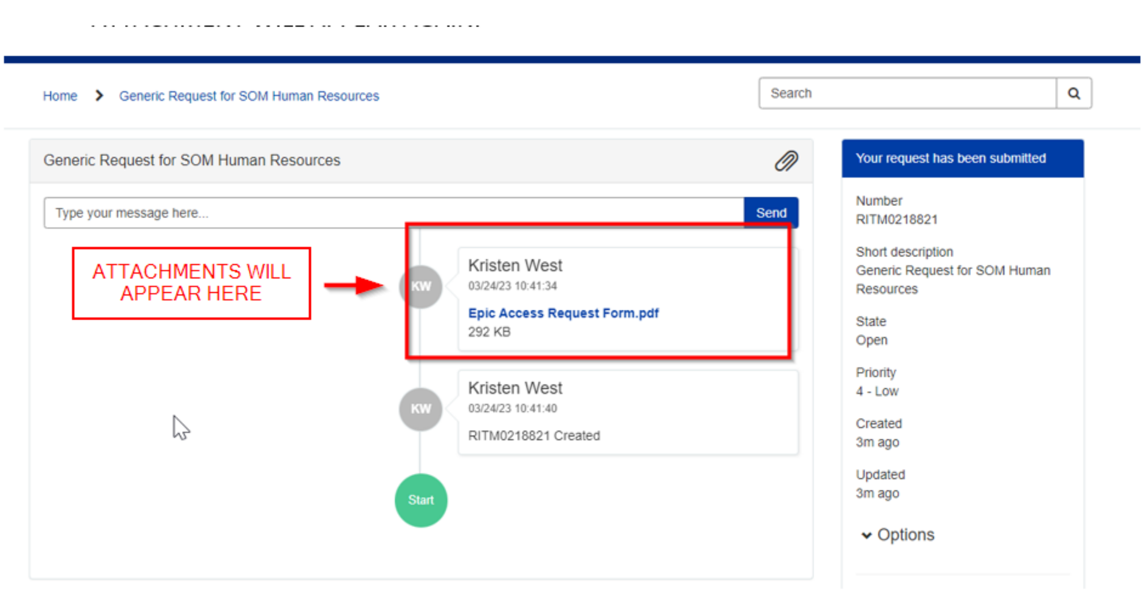
c. Add total amount of reimbursement, FAU details, and attach all receipts.
d. Add the name of the person being reimbursed in the comments section.
e. If any request requires someone to be notified, instructions for adding names to the watchlist is detailed in the next section of this user guide.
f. Once complete, select submit.



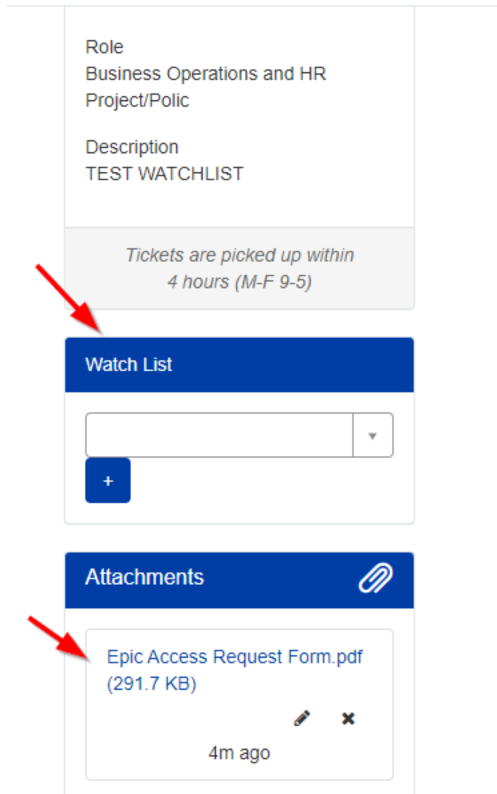
4. After submission the following screen will provide you with the RITM number that was created for the Business Operations Team to review. Note: Do not add someone to the watchlist from this screen. Also, your attachments may not appear from this screen. Click on the RITM number (circled in red below) and this will take you to a new screen.



5. After clicking on the RITM number, the screen pictured below will appear. In this screen the attachments should appear, and additional staff may be added to the watchlist by scrolling down.

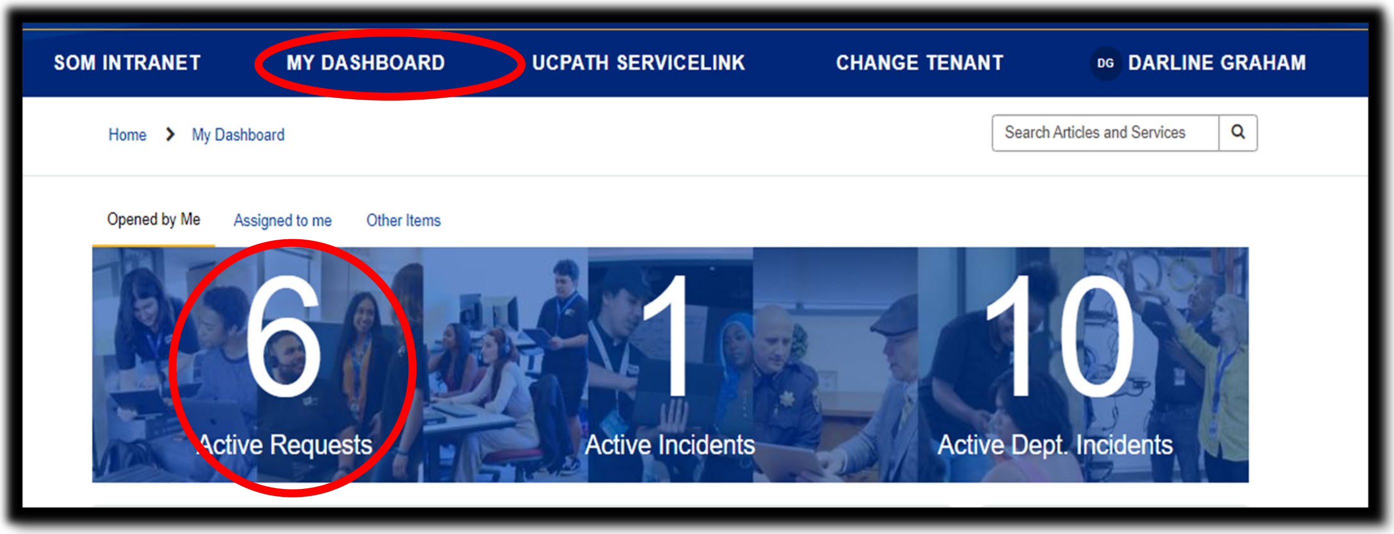


6. Add to the watchlist by typing first name, last name, and plus sign. Any attachments that were previously added will appear in this window. New attachments can be added by clicking on the paper clip on this page.

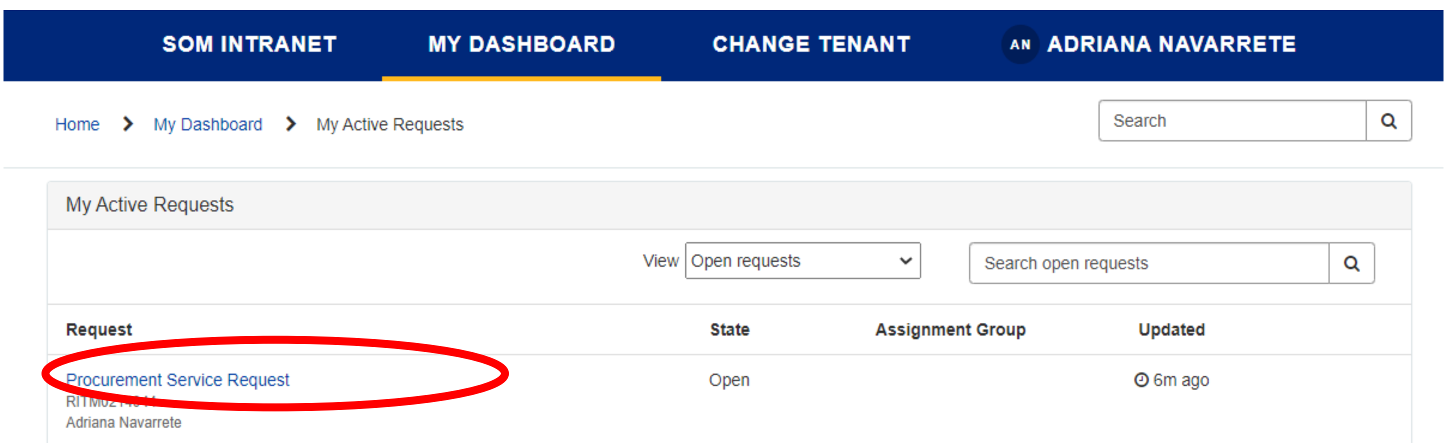


Viewing a Request

1. In the main ServiceLink portal go to “My Dashboard,” select “Active Requests.”



2. All active requests will be displayed. Click on the request.



3. After clicking on the request, the status updates and comments will be displayed.