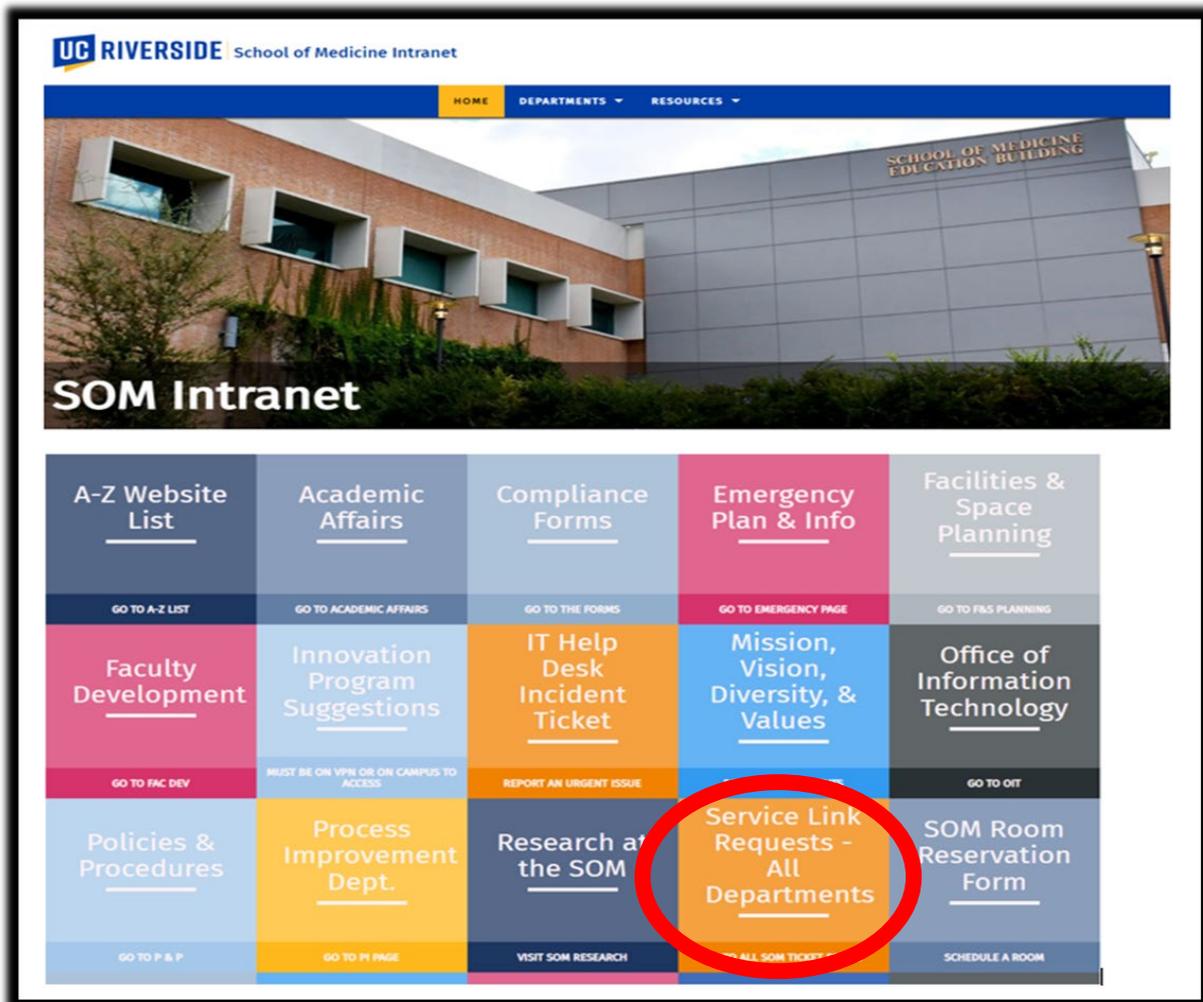


SOM Business Operations Reimbursement Request Form Process

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 not to be used for Honorarium Payments, GME Reimbursements, Stipends, Check Requests or Travel Reimbursements.**

Entering a request

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.”

The screenshot shows the UC Riverside Service Catalog interface. On the left is a 'Categories' sidebar with the following items: Human Resources (5), Business Operations (7), Facilities (2), Faculty Development (1), OIT Security (4), OIT Services (14), and Sponsored Research and Prog... (1). The 'Business Operations' category is highlighted with a red box. The main content area is titled 'Service Catalog' and has a sub-header 'Business Operations'. Below this, there are several service cards, each with a 'View Details' button. The 'Reimbursement Request' card is highlighted with a red box. The cards include: Entertainment Preapproval Form, Fund Transfer Requests / Fund Swap Requests, Generic Request for SOM Business Operations (with a note: 'Please use this form for general UCR SOM Business Operations request.'), Procurement Commodity Request, Procurement Service Request, and Travel Request Form (with a note: 'This form is used for both pre-travel arrangements and post-travel reimbursements.').

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 ⓘ
 x v

Email

Phone

Department

Role

Today's Date
 ☰

Is the reimbursement for an employee?

Type of reimbursement

Business Purpose

Item Info: ⓘ
 ✕

Items

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.

Total amount of reimbursement request

FAU DETAILS: ⓘ

You may add up to 3 lines ✕

FAUs

Actions	FAU	Name of FAO/ budget owner	Amount on this FAU
No data to display			

Comments

Attach all receipts or missing receipt form in the bottom right corner of this form. ⓘ

Receipts must be itemized, show the vendor name, show the form of payment, and total amount paid. If the form of payment is not listed on receipt, please attach a bank statement or credit card statement. Statements must show the vendor name and the name of the person being reimbursed. ✕

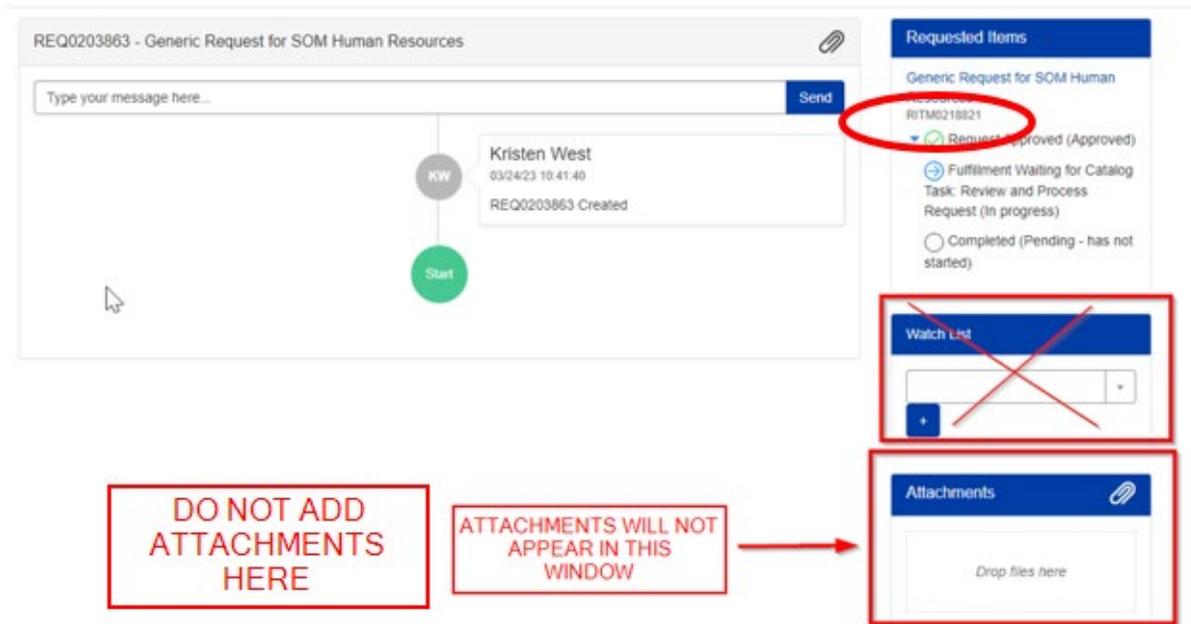
Does this request require any exceptions

-- None -- ▼

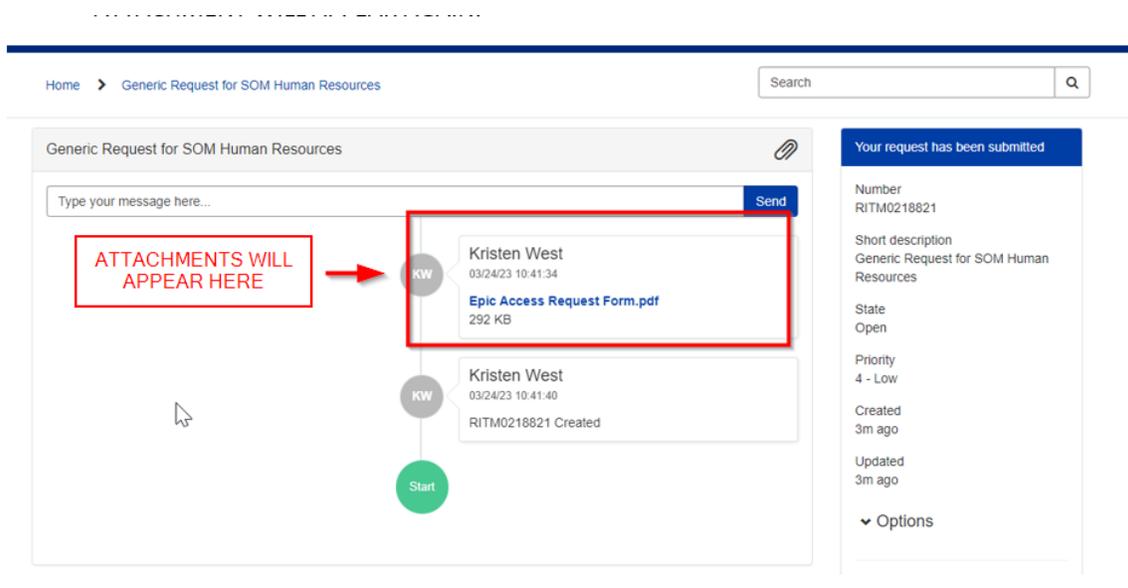




- After submission the following screen will provide you with the RITM number that was created for the Business Operations Team to review. Note: Do not add someone to the watchlist from this screen. Also, your attachments may not appear from this screen. Click on the RITM number (circled in red below)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



- 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.

Role
Business Operations and HR
Project/Polio

Description
TEST WATCHLIST

*Tickets are picked up within
4 hours (M-F 9-5)*

Watch List

▼

+

Attachments 

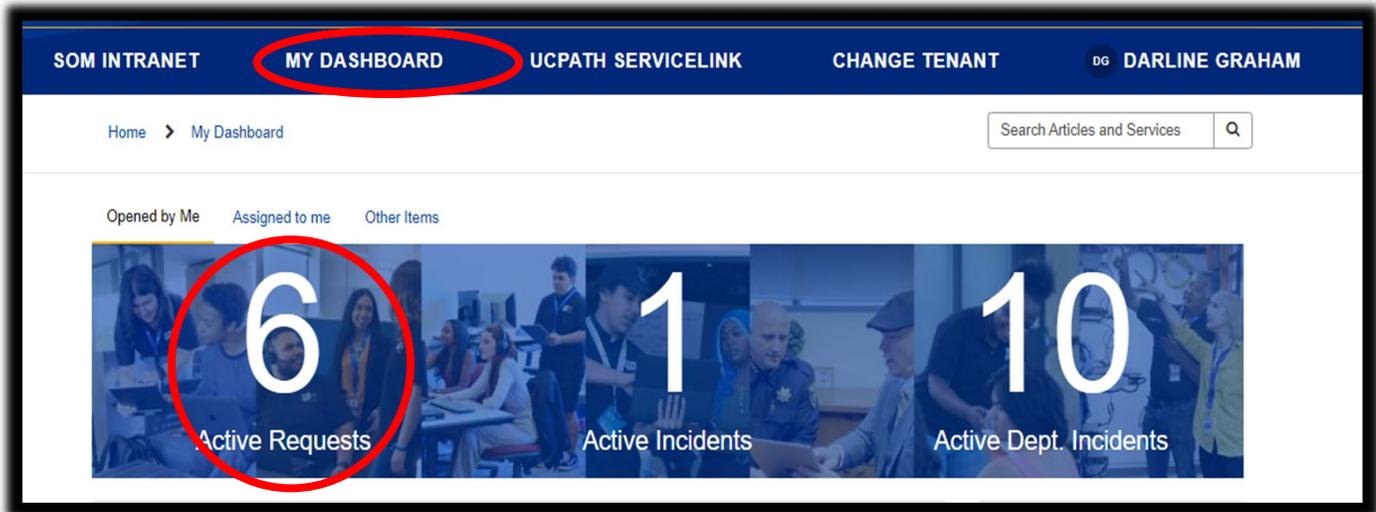
 Epic Access Request Form.pdf
(291.7 KB)

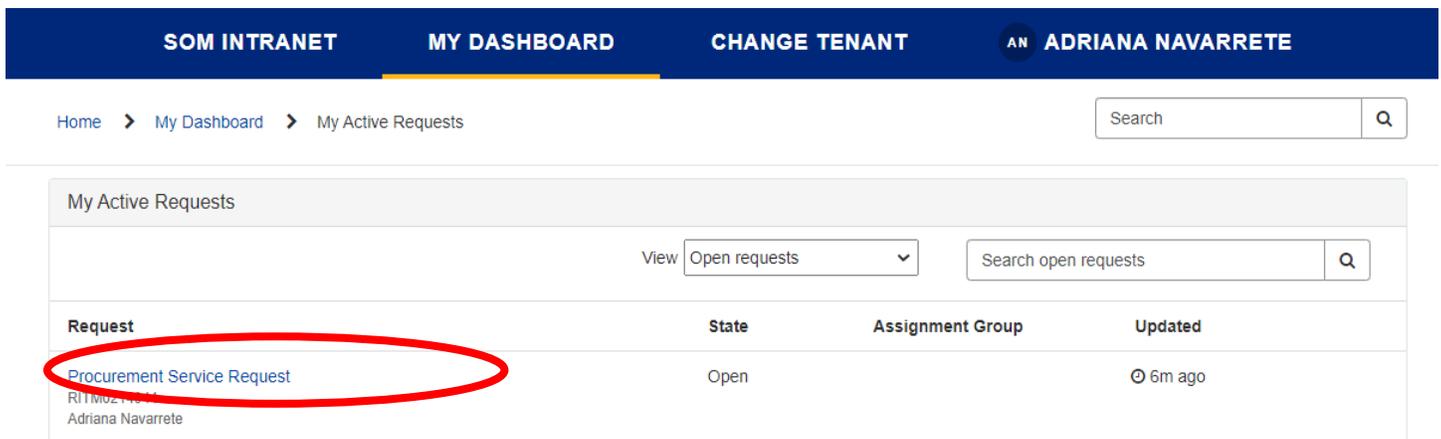
4m ago

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.

SOM INTRANET **MY DASHBOARD** **CHANGE TENANT** **AN ADRIANA NAVARRETE**

Home > My Request - RITM0214044

Number: RITM0214044 Created: 9m ago Updated: just now State: Open

Procurement Service Request

Item: Procurement Service... Requested for: AN Adriana Navarrete

Stage: Fulfillment

Activity Attachments Additional Details

Type your message here... Post

AN Status updates from BO Team just now Additional comments

AN RITM0214044 Created 9m ago

Start