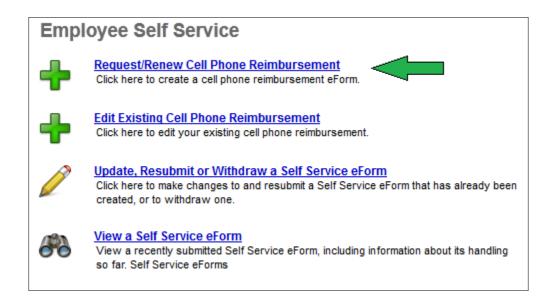
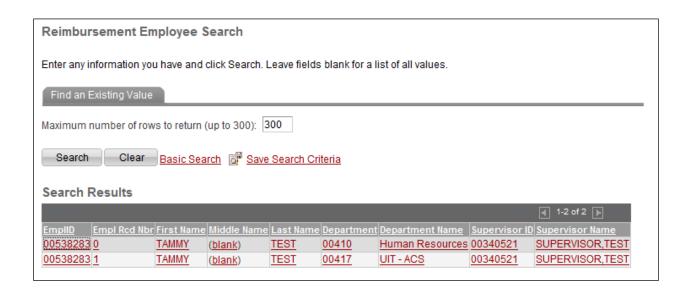
# **Phone Reimbursement Instructions**

# REQUEST CELL PHONE REIMBURSEMENT

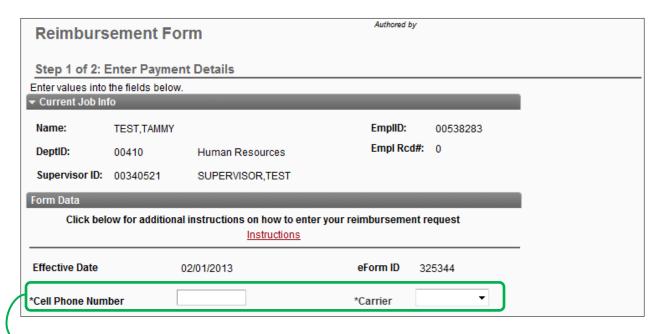
To request a **new** or **renew** a previously expired cell phone reimbursement, click on the 'Request /Renew Cell Phone Reimbursement' link.



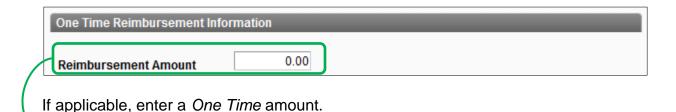
\*Note: Only if you have more than 1 active employment record the following page will appear. Please select the row, on which you want to request a cell phone reimbursement.



If you only have 1 active employment record then the form will open automatically and look like the following.



- Enter your cell phone number, area code first.
- Select your cell phone carrier from the available list.



• Then indicate in the comments section if the *One Time* reimbursement is for a cell phone **equipment reimbursement** or a missed **retroactive** monthly payment.

Monthly Reimbursement Information			
Total Monthly Charges	0.00		
Total Employee Charges	0.00		
Average ESTIMATED % of Bu	usiness Use 0.00	Reimbursement Amount	0.00

Enter Monthly Reimbursement details info the following fields:

- Total Monthly Charges is your total billed amount from your carrier.
- <u>Total Employee Charges</u> is the amount billed only for the cell phone number entered above.
- Average Estimated % Business Use is the percentage that you and your manager have decided upon.
- Reimbursement Amount is calculated by multiplying the Total Employee Charges by the Average Estimated %.

(Total Employee Charges x Avg Est. % = Reimbursement Amount)



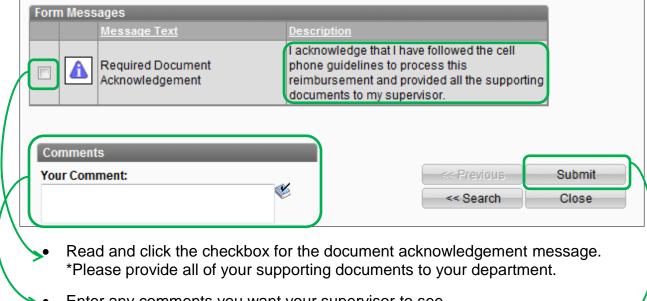
- Enter the distribution (chargeable chartfield).
- Select activity value by clicking on the magnify glass. Or enter an 8 digit value directly into the field.

Projects must begin with '5'. For example '5XXXXXXX' All other activities are preceded with zeros. For example '000123456'

Select account value that begins with '633XX'

63300 – 63319: Telcom – Other Charges

\*Note: One Time and Monthly Reimbursements can only be charged to one chartfield.



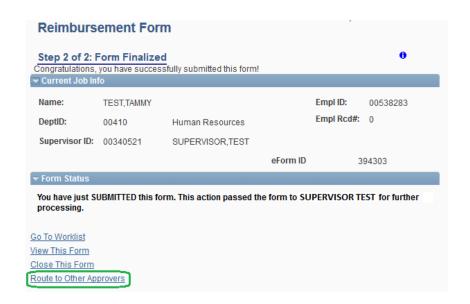
- Enter any comments you want your supervisor to see.
  - Click the 'Submit' button to route your form to your supervisor for approval.

### ROUTING CELL PHONE REIMBURSEMENT

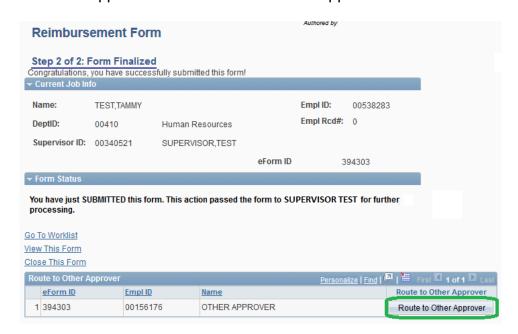
All reimbursements route as follows;



**Routing to Other Approvers:** Click on the link 'Route to Other Approvers' *after* submitting the form if the form needs to be approved by a department head approver instead of your supervisor.



Then select one approver name from the list that appears.



**Note:** If the distribution is for a grant or project, your form will automatically route to the Office of Sponsored Projects for approval after it has been approved by your supervisor or department head approver.

# RENEW CELL PHONE REIMBURSEMENT

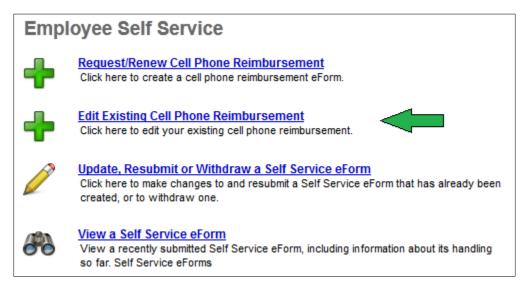
When you get a reminder email from the system to renew, follow the same steps as shown in the request cell phone reimbursement section.

#### EDIT EXISTING CELL PHONE REIMBURSEMENT

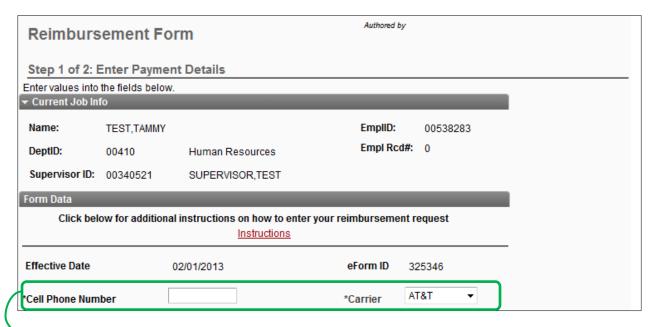
You will use this link when you need to change the following on a reimbursement that is already in place.

- Reimbursement amount
- Distribution (Chartfield)
- Cancel reimbursement

Click on the 'Edit Existing Cell Phone Reimbursement' link.



The form will prepopulate with some information from your existing reimbursement.

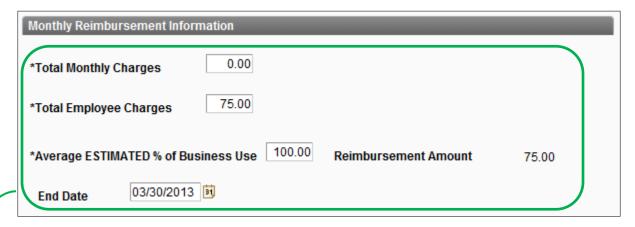


If applicable, enter any missing information.

One Time Reimbursement Info	ne Time Reimbursement Information			
Reimbursement Amount	0.00			

If applicable, enter a One Time amount.

 Then indicate in the comments section if the One Time reimbursement is for a cell phone equipment reimbursement or a missed retroactive monthly payment.



If applicable, enter or change your *Monthly Reimbursement* values.

 To end your existing reimbursement change the 'End Date' to be the last day of the month in which you want to receive your final reimbursement.

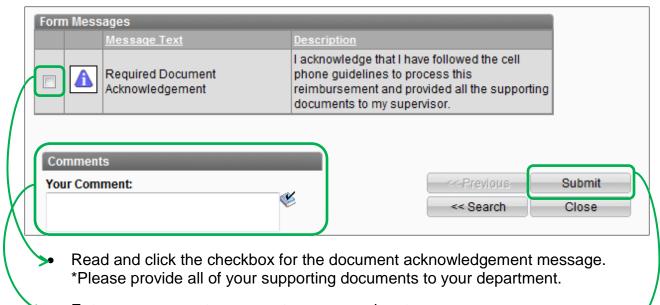


If applicable, enter or change your distribution data (chartfield) values.

- Activity value should meet the following criteria:
  - 8 digits in length

If the value is a project it must begin with a '5'. For example '5XXXXXXX' All other activities are preceded with zeros. For example '000123456'

- Account value should begin with '633XX'
  - 63300 63319: Telcom Other Charges

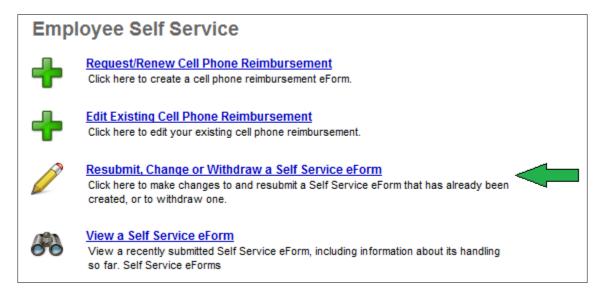


- Enter any comments you want your supervisor to see.
- Click the 'Submit' button to route your form to your supervisor for approval.

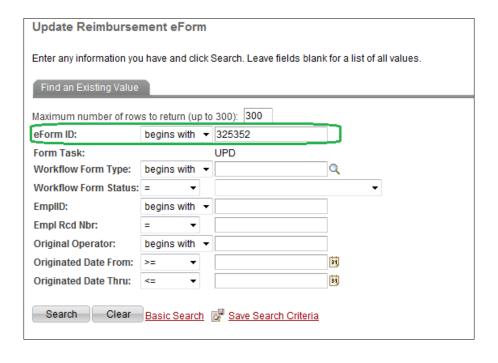
## RESUBMIT, CHANGE OR WITHDRAW AN EFORM

Use this form when you want to Resubmit, Change or Withdraw an eForm that has previously been submitted:

- Resubmit / Change Change a value on the form and resubmit to obtain all approvals again
- Withdraw Cancel all processing of the form



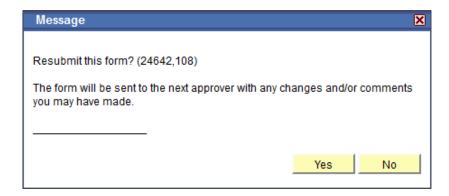
From the Search Page enter a value into any of the search fields to select a previously submitted request that needs to be resubmitted, changed or withdrawn.



Once selected, you will be brought to a page displaying the request information as previously entered.

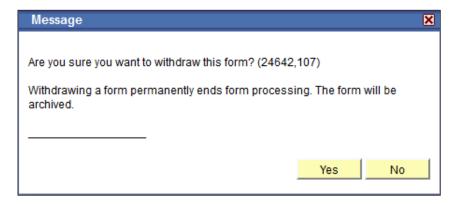
After working your way through the request make any necessary changes. Indicate in the comments section exactly what was changed (if applicable) and the reason for the change, resubmission or withdrawal. From there, select one the following options:

- Close This will allow the user to exit the page without making any changes.
- Resubmit If the user initiates changes, the form will need to be resubmitted. This
  will save the changes that have been entered and send the eForm back through the
  approval steps. The final page below allows the user to determine if the form should
  be resubmitted.



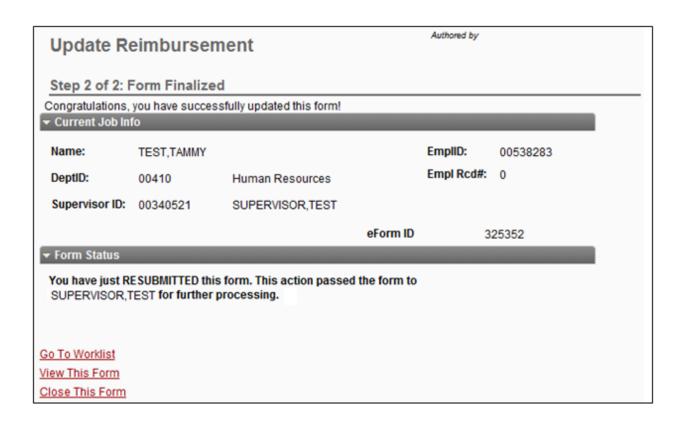
If the form is ready to be resubmitted select, "Yes." To return to the previous page and make changes to the form select, "No."

 Withdraw – If the request should no longer be considered (the manual override does not need to happen, for example), the form will need to be withdrawn. This will cancel the request completely and not allow any additional action on the request. If this option is selected it will advance to the following screen to finalize the action.



If the form is to be permanently ended select, "Yes." To return to the previous page and make changes to the form select, "No."

The final page will confirm that the request was successfully placed on hold, withdrawn or resubmitted.



**Note:** Once a request has been approved by the final approver and executed to the system the previously submitted eForm is no longer available to resubmit, change or withdraw.

## VIEW A REIMBURSEMENT EFORM

Use this section to view a recently submitted eForm, including all the details of the request, any comments made through the approval process, and information about its handling so far. This is a read-only view and shows a listing of all forms submitted by you.

From the Search Page enter a value into any of the search fields to select the request you wish to view.

