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.

**Employee Self Service**

- **Request/Renew Cell Phone Reimbursement**
  Click here to create a cell phone reimbursement eForm.

- **Edit Existing Cell Phone Reimbursement**
  Click here to edit your existing cell phone reimbursement.

- **Update, Resubmit or Withdraw a Self Service eForm**
  Click here to make changes to and resubmit a Self Service eForm that has already been created, or to withdraw one.

- **View a Self Service eForm**
  View a recently submitted Self Service eForm, including information about its handling so far. Self Service eForms

*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.

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.
Enter Monthly Reimbursement details into the following fields:

- **Total Monthly Charges** is your total billed amount from your carrier.
- **Total Employee Charges** 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 %.
  
  \[(\text{Total Employee Charges} \times \text{Avg Est. %}) = \text{Reimbursement Amount}\]

- 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 ‘5XXXXXXXX’
  All other activities are preceded with zeros. For example ‘000123456’
- Select account value that begins with ‘63XX’
  
  63300 – 63319: Telcom – Other Charges

*Note: One Time and Monthly Reimbursements can only be charged to one chartfield.
• Read and click the checkbox for the document acknowledgement message.
  *Please provide all of your supporting documents to your department.
• 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 Diagram]

**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.
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 ‘5XXXXXXXX’
  All other activities are preceded with zeros. For example ‘000123456’

- Account value should begin with ‘633XX’
  63300 – 63319: Telcom – Other Charges
Read and click the checkbox for the document acknowledgement message.
*Please provide all of your supporting documents to your department.

- 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.

  ![Message](image)

  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.

  ![Message](image)

  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.

![Update Reimbursement](image)

**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.