

School of Natural Sciences

Finance Suite - Frequently Asked Questions

Account Owners

My student needs to use my account for a reimbursement. What do I do?

1. You can give someone actor permission on your account so they have the ability to select that account when they request a reimbursement. Giving actor permission only allows a user to *request* reimbursement. You will be notified of all requests on your accounts. To give actor permission: log into *Finance Suite* and select Accounts. Search and select the account. Select the Actors tab. Search and select the user using their name or UCMNETID.

OR

2. You can instruct them to select you as their host in Finance Suite. Once they submit the reimbursement request. You will be notified and asked to select an account on their behalf.

My student needs to be reimbursed from a departmental account and has asked for help. What do I do?

Students can be added as actors on departmental accounts. They should contact the Natural Sciences business office at snsbusiness@ucmerced.edu and provide evidence of your approval (e.g. email) for the expense.

Do I have to remove actors on my account?

For the most part, no. It is not necessary to remove actor permissions because you can simply deny any request that you receive. However, if there is a necessity to remove actor permissions (for example: you do not want to receive approval requests from a specific user), you can remove them as an actor so that they are not allowed to select your accounts.

Is it possible to give actor permissions to all of my accounts at once? Or, do I have to add actors to each account separately?

In order to ensure that account owners are not bombarded with erroneous reimbursement requests, account owners must give each student actor permissions on each account which they can request reimbursement.

I have received an approval request notification from FS. What do I do?

Sign into Finance Suite and review the summary information. Review for the requested reimbursement amount and trip description. Either approve or deny the request. If you deny the request, be sure to include a reason for your denial so that, if applicable, the traveler may update the request and resubmit.

What happens after I approve a charge on my account?

FS will transition the reimbursement request to the next stage where an account approver will confirm that there are funds available in the account you approved. It will then move to our business office where it will be audited for policy adherence. Once all requirements have been fulfilled the reimbursement will be submitted to UCLA for payment.

I have just denied a reimbursement request. What happens next?

The traveler will be notified that the request was denied. They can take corrective action and resubmit the reimbursement. The entire approval process will restart.

Once UCLA receives the reimbursement request from the processing team, how long does a reimbursement take?

It depends on the scope of the reimbursement request. Small requests (such as a reimbursement requests for mileage only) can be approved much faster than a request with many items. Normally, a traveler will receive a reimbursement within 3-4 weeks of submittal to UCLA.

I want to submit a reimbursement request on my own account. Are there special circumstances I should be aware of?

No! Since you are the account owner there is no need to request owner approval. Your reimbursement request will be submitted directly to an account approver who will ensure that funds are available in the account you have selected. The reimbursement process will proceed like any other reimbursement request.