School of Natural Sciences
Finance Suite - User Instructions

Step 1: Log in [https://nsbus.ucmerced.edu](https://nsbus.ucmerced.edu)

Use your UCMNetID and password. Guests: register a visitor account.

Step 2: Go to the reimbursement section

Click “Go to Travel Reimbursements”

Step 3: Create a FS Request

Click “Start Travel Reimbursement”

Step 4: Give your request a title and description

If this is a general reimbursement (see FS - FAQ “What is a General Reimbursement?”) title your request “General Reimbursement.” Otherwise, use any title that will help identify your request.

Provide a summary of your request and clear business purpose or justification for the expenses.

Step 5: Give us the funding source

Use the drop down menu to search for your preferred account. You can search using any part of the FAU or account description. If your search does not return any results it is because you have not been given access to use the specified account or the account is out of funds.

If you are an account owner and believe your account should be available, contact SNSBusiness@ucmerced.edu.

If you are not an account owner, click “select a host.” Your host is the owner of the account on which your reimbursement will be paid. Upon your submittal, your host will select an account for you. *Contact SNSBusiness@ucmerced.edu if you are unsure about your host.

Step 6 (optional): Add notes or comments for our processing team

You may include additional comments for our processing team.

- Charge 50% to my other account: 123456-2A-20095
- Item purchased on a weekend b/c I could not wait for business office
- Not claiming meals b/c my hosts covered these costs.
- No conference fee b/c I was an invited speaker

*To avoid processing delays: ensure you have selected the appropriate host prior to submitting your request. Submitting to the wrong host will cause a delay in your reimbursement.*
Step 7: Add a line for each expense

Click “Add Item” and then complete the fields as appropriate from the menu selections.

For general reimbursements (and all other unlisted reimbursement types), use type “other.” Add one item for each transaction (i.e. do not add an item for each item purchased at a single vendor. Rather, add one item for each receipt). Be sure to include a detailed description of the item and its business purpose or justification for reimbursement.

Continue to add items until all of your expenses have been listed. Click “Review & Submit.”

Step 8: Review your reimbursement

Items to consider:

◊ Make sure that you have given a detailed business purpose and justification for your reimbursement request.

◊ Make sure all attachments are legible and show the necessary information.

◊ Please note that the “reimbursable amount” shown is an estimate and may differ from the “total amount” shown. This is due to the competing travel, entertainment and general reimbursement policies. The “reimbursable amount” calculates on the most conservative policy and, depending on the type of reimbursement, will be corrected by your travel or procurement specialist.

Step 9: Submit for Approval

Once you have added all of your items to the FS request, click “Submit for Approval.”

If you have selected a host: your reimbursement request will move to the owner approval stage where your host will approve or deny your request. If approved, your request will move to the account approval stage.

If you are an account owner: your reimbursement will move directly to the account approval stage where fund reviewers will confirm that funds are available. If funds are not available or the expense is not allowable on a particular account, you will be asked to provide a new account until an account is approved. Your request will move to the UC Merced audit stage.

Once approved by account owners and approvers, your reimbursement will move to the UC Merced audit stage where our business team will be audit your request for policy adherence. Once all requirements are satisfied, your reimbursement will be submitted to UCLA for final review and payment.