Personal Reimbursement Request Form

A Personal Reimbursement Request Form is now available in the OSCAR Marketplace. This form is intended to replace the REQUEST and APPROVAL for a personal reimbursement through an email to Procurement. **It does not replace the need to actually submit for the reimbursement in CONCUR.** When submitting the request in CONCUR, you must attach the approval email you will receive from OSCAR when the form has been approved by Procurement. The process for submitting and receiving an approval through this new form is outlined below.

**Personal Reimbursement Request Form available in the OSCAR Marketplace:**

Click on the “Personal Reimbursement Request” button, and the screen below will appear:

**Instructions:**

The first screen contains instructions for how to utilize the form, and also states that you must attach pertinent documentation for the reimbursement request.

Click “Next”
Details:

Use the “Form Name” field to name the reimbursement request (use this field as you would use the “Requisition Name” field on the Requisition document). **NOTE: it is recommended that you use the name of the person being reimbursed in this field as whatever text you put in this field will be included in the approval email.**

Click “Next”

Attachments:

Click “Add Attachment” to attach documentation relative to the reimbursement request. You must attach a quote or description (with pricing information) of the product to be purchased. Please make sure that any links included in the attachment are functional. **This is a required step in the reimbursement request process.**

Click “Next”
Questions:

There are six mandatory questions that must be answered when completing the Personal Reimbursement Request form.

1. Person that will be requesting to be reimbursed
2. Summary statement supporting the need to purchase outside the OSCAR Marketplace
3. Name of the desired supplier
4. Description of items to be purchased
5. Category of items to be purchases (select from five choices – see below)
6. Amount of purchase

Once all questions have been answered click “Next”
Review and Submit:

The Review and Submit tab will confirm that all sections of the form have been completed. If a “required” field has not been completed this screen will alert you where it is and will allow you to click on the section so you can return and complete it. Once all required fields are complete, click “Submit”. 
Review and Approval process:

Once you click “Submit” the form will be submitted for review and approval. If the request is “Approved” you will receive an email with the approval.

Form approval email:

![Email approval screenshot]

Returned and/or rejected requests:

Reimbursement requests may be returned by Procurement Services to the “requestor” for more information. If the form is returned to you, you will receive an email and a notification alerting you to the fact that it has been returned. If it is returned, please provide the requested information and “resubmit” the request for review.

Procurement may also reject a request and you will receive an email and notification stating why the request has been rejected.

PLEASE NOTE:
**All personal reimbursement requests are subject to the Institute’s procurement policies and procedures. Depending on the nature of the request, it may require additional review by departments other than Procurement Services (i.e. Legal, Export Control, etc.).**

For more information on the “Personal Reimbursement Request” form please contact procurement_support@lists.rpi.edu