

IFAS Shared Service Centers (SSC)

Reimbursement (non-travel) Instruction Guide

To standardize processes for all departments, please email all documents (scanned or electronic copies) to the appropriate Shared Service Center ([McCarty](#) or [Fifield](#)). Each email should have a subject line containing [REIMBURSEMENT](#). (Example: **Subject: Reimbursement for Smith**)

Step 1: Individual makes a business related purchase with personal funds

- All Faculty and Staff are responsible for following current regulations as specified in the [UF Directives & Procedures](#).

Step 2: Individual or Unit prepares receipts to be sent to the SSC

For Paper Receipts:

- Scan receipt and any appropriate documentation, forms, or justifications as .pdf files.
- Prepare an e-mail to be sent to the appropriate IFAS SSC ([McCarty](#) or [Fifield](#)); remember to include subject line as indicated above. Please include the required information as described below or use the [Reimbursement email template](#).
- Be sure image(s) is/are legible and attach to email.

For Electronic Receipts Received via Email:

- Forward the email from the vendor which contains the purchase receipt or invoice to the SSC ([McCarty](#) or [Fifield](#)).
- Include the required information as described below or use the [Reimbursement email template](#).
- Scan any additional forms or justifications as .pdf files and attach to the email.

Required In the Body of Email OR Handwritten on the receipt:

- Name of individual.
- Project or fund to be used for payment and, if applicable, faculty name.
- Unless clearly listed on receipts, include description or list of items purchased.
- Justification, use or benefit for the purchase.
- If purchasing food or beverages, include an itemized receipt and a list of attendees.
- Be sure to include evidence of:
 - Internal approval: This can be an email approval from the faculty member or supervisor or handwritten signature on the receipt.
 - Acknowledgment of charge by individual: This can be an email acknowledgement or handwritten signature on the receipt.

Step 3: SSC receives and processes Reimbursement

- SSC reviews and analyzes the reimbursement request.
- SSC processes reimbursement in PeopleSoft.
- Reimbursement will be direct deposited within 7-10 business days.

Quick Tips and Helpful Links

- If purchases were travel related, please see our Travel Instruction Guide.
- [UF Purchasing](#)
- [UF Purchasing Helpful Resources](#)

For assistance with this process or anything else, please contact your Shared Service Center:

McCarty

Phone: 352-294-3199

Email: mccarty-ssc@ufl.edu

Fifield

Phone: 352-273-4583

Email: fifield-ssc@ufl.edu