

Requesting Reimbursement with Erequest

BEFORE PURCHASE

- Contact Suzanne M.S. Mikos (mikos.2@osu.edu) before making a purchase for reimbursement. There may be purchasing methods that are more cost- or time- efficient or that are in better compliance with Ohio State policies.
- If given approval to continue with purchase for reimbursement, please bring the “Blanket Tax Exemption Certificate” (accessed [here](#) using your name.n and password) to vendor so that tax is not charged.
- You may either: a.) scan receipts and attach them as you enter erequest or 2.) Provide receipts to Suzanne to upload after you enter the erequest.
 - Be sure to return itemized receipts.
 - BUSINESS MEALS: If the pcard is used for a business meal, please provide names and affiliations of all attendees when you return the receipt.

AFTER PURCHASE

- 1.) Log into erequest.osu.edu with your name.n and password.

You've requested a web page which requires a user login.

Identify Yourself

Enter your Ohio State Username (lastname.#)

Example: doe.1

Password or Passcode

Enter your account password.
BuckeyePass users, enter your Passcode.

- 2.) Select “New”

[Home](#) [Worklist](#) [Preferences](#) [Help](#)

eRequest Home

Actions

Create a new eRequest.

Search for existing eRequests.

3.) Under “Pay Someone” choose “Reimbursement to Employee”

Purchasing/Payment Option

<p>Buy Something</p> <p><input type="radio"/> Standard Purchasing Request Quote ID <input type="text"/></p> <p><input type="radio"/> Purchasing Card Preferred</p> <p><input type="radio"/> Internal Order</p> <p><input type="radio"/> Blanket Order Release</p>	<p>Pay Someone</p> <p><input checked="" type="radio"/> Reimbursement To Employee Employee ID <input type="text"/></p> <p><input type="radio"/> Payment</p> <p><input type="radio"/> Refund</p> <p><input type="radio"/> Reimbursement To Non-Employee</p>
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4.) Complete item details. Keep your name as the vendor, as payment will be issued to **you**.

Vendor/Payee and Item Details

* Description	UOM	* Quantity	* Estimated Amount	Total Estimated Amount
<input type="text" value="chocolate globe candy"/>	<input type="text" value="ea"/>	<input type="text" value="1"/> X	<input type="text" value="49.07"/>	= \$49.07

Vendor/Payee Information (e.g. address, city, state)

210 characters remaining

TOTAL Request Amount \$49.07

5.) Complete business purpose. This should state the details of **why** university funds are being used *not what* they are being used for.

General Request Information

<p>* Ship To (e.g. Building Name, N/A)</p> <p><input type="text" value="N/A"/></p> <p>251 characters remaining</p>	<p>Additional Info (e.g. Web Address, Shipping Cost, Special Instructions)</p> <p><input type="text"/></p> <p>254 characters remaining</p>
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*** Business Purpose for the Item(s) Above**

For Meal Reimbursements - Please Be Specific: what business related issues were discussed, list of attendees, name of place meal took place

183 characters remaining

6.) Enter general funding information (e.g., PRA balance, SBS small grant, colloquium funds) if known. For “org number,” use 07330 for Geography and 07350 for CURA.

Funding Source

* Org Number

Organization Name Geography

Research Project Number

Special Funding Instructions

244 characters remaining

7.) Press "continue" and then "submit for approval"

Actions

Actions

8.) You will receive an email notifying you when the request is approved. You will also receive an email when the reimbursement has been directly deposited to your account.