

CREATE AND SUBMIT A GENERAL REIMBURSEMENT EXPENSE REPORT

The General Reimbursement expense report is to reimburse for expenses personally paid by UF employees or other individuals conducting official UF business. These reimbursements should be used for small, “out-of-pocket” purchases only when the University’s preferred purchasing methods cannot be utilized.

To reimburse for travel expenses, refer to the [Create and Submit a Travel Expense Report](#) guide.

NAVIGATION

Access UF GO via [ONE.UF](#) and [myUFL](#)

- **ONE.UF:** Log in to <https://one.ufl.edu> > Select **UF GO** under the Faculty/Staff section
- **myUFL:** [my.ufl.edu](#) > My Self Service > **UF GO Travel and PCard**

LOGGING IN

1. Enter gatorlink@ufl.edu and click **Next**
2. Click **Sign in with University of Florida SSO**
3. Enter **UF gatorlink** and **password**

Note: If you are already signed-in to myUFL or other UF system, this step will automatically skip.

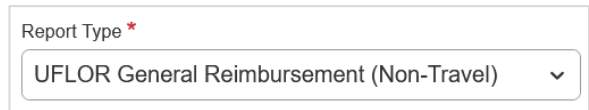
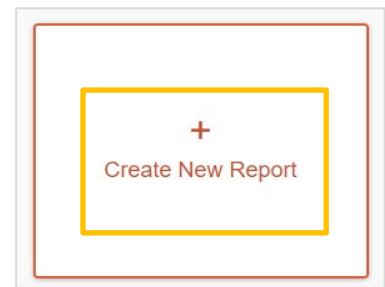
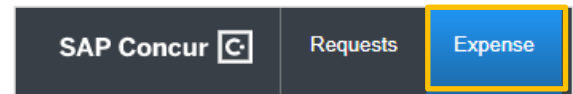
CREATE GENERAL REIMBURSEMENT EXPENSE REPORT

Tip! If you are a delegate preparing a report for a user, you must first act on their behalf in UF GO. Refer to the [Act as a Delegate User](#).

STEPS

1. Click the **Expense** module
2. Click **Create New Report**
3. Select the Report Type **UFLORE General Reimbursement (Non-Travel)**
4. Enter a **Report Name/Description**
 - Provide a description that will be easily recognizable to the user and approver. For example: “Student Clinic Purchases”.
5. Complete required Chartfield information (red asterisk are required)
6. Click the **Create Report** button

Note: Prior to entering expenses, upload your receipts. Refer to the [Managing Receipts](#) guide for more information.



ADDING TRANSACTIONS TO AN EXPENSE REPORT

1. Click [Add Expense](#)
2. Select [Create New Expense](#) tab **OR** [Available Expenses](#) tab

CREATE NEW EXPENSE

- a. Click [Add Expense](#)
- b. Select the [Create New Expense](#) Tab
- c. Enter or Select [Expense Type](#)
- d. Complete required fields

OR

ADD AVAILABLE EXPENSES

- a. Click [Add Expense](#)
- b. Select [Available Expenses](#) tab
- c. Select desired available expense
- d. Complete required fields

3. [Click Add to Report/Save Expense](#)

The selected expense(s) will now appear in the list of expenses in the expense report.

4. Click on the expense line to review the details
 - o Select the appropriate expense type if incorrect is displayed
 - o Undefined charges will need to be changed to an option from the drop-down menu
5. Complete any additional required fields indicated by a red asterisk (*)
6. Click [Save Expense](#)

ALLOCATE EXPENSES

You can split expenses to different funding sources. Refer to the [Allocate Expenses to More than One Chartfield guide](#). If all expenses will be charged to the ChartField string in the Report Header, no additional action is needed.

MISSING RECEIPTS

If a user is missing a receipt, follow the [Missing Receipt Declaration](#) instruction guide to account for it.

SUBMIT REPORT

Reminder! If you are a delegate and prepared this report on behalf of another user, once you click [Submit](#), they will receive an overnight notification to log into UF GO to review and submit the travel expense report.

Once all expenses are entered, upon the submission of the expense report, the system may flag issues. Red alerts will need to be cleared prior to submission while yellow are typically informational.



Student Clinic 2/7/23 \$100.00
Not Submitted | Report Number: 13MFBB

Report Details ▾ Print/Share ▾ Manage Receipts ▾ Travel Allowance ▾

Add Expense Edit Delete Copy Allocate

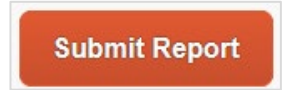
3 Available Expenses + Create New Expense

ALERTS

	Red alert: Requires action, it indicates an item needs to be resolved before request can be submitted. Click on the alert to learn what needs to be fixed.
	Yellow alert: Informational, indicates the request has an exception or provides additional information. It is a good idea to review but will not prevent submission of the request.

STEPS

1. Click [Submit Report](#)
2. Review the User Electronic Agreement and click [Accept & Continue](#)
3. Review the Report Totals pop-up
4. Click [Submit Report](#)



Report is submitted and the approval workflow process initiated. The status of the report can be viewed on the [Manage Expenses](#) page.

User Expense Report Electronic Agreement ✕

By clicking on the 'Accept & Submit' button, I certify that:

1. This is a true and accurate accounting of expenses incurred to accomplish official business for the University and there are no expenses claimed as reimbursable which relate to personal or unallowable expenses.
2. All required receipt images have been attached to this report.
3. I have not received, nor will I receive, reimbursement from any other source(s) for the expenses claimed.
4. In the event of overpayment, accidental personal usage or if payment is received from another source for any portion of the expenses claimed I assume responsibility for repaying the University in full for those expenses.

Cash Advance Request (When Applicable)
I agree to be personally accountable to the University of Florida for the appropriate use and disposition of these funds, including safeguarding against loss, theft, or unauthorized use.

As the recipient of the cash advance, I am responsible in complying with all applicable rules, regulations, and policies, including reconciling advanced funds with appropriate documentation and receipts within the required time frames. It is

Cancel
Accept & Continue

RECALL

If an expense report needs to be modified after it has been submitted into approval workflow, the [Recall](#) button allows for a user to pull it from workflow.



The [Recall](#) button becomes available once the external validation step is complete as part of the approval workflow.

FOR ADDITIONAL ASSISTANCE

Technical Issues

The UF Computing Help Desk
352-392-HELP
helpdesk.ufl.edu

Travel Policies and Directives

Travel Office
352-392-1241
travel@ufl.edu

PCard Policies & Questions

PCard Team
352-392-1331
pcard@ufl.edu