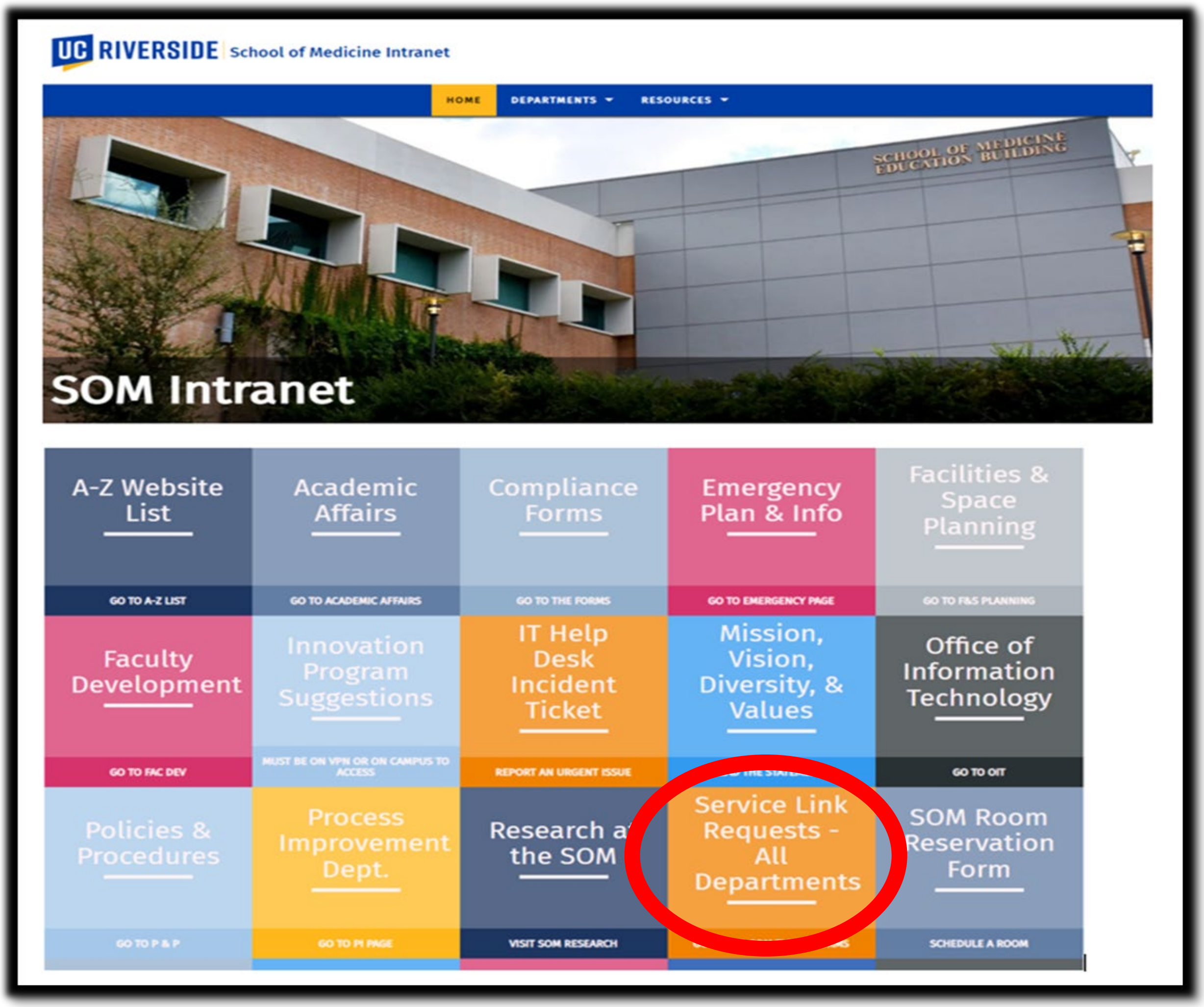
SOM Business Operations Generic Request Form Process

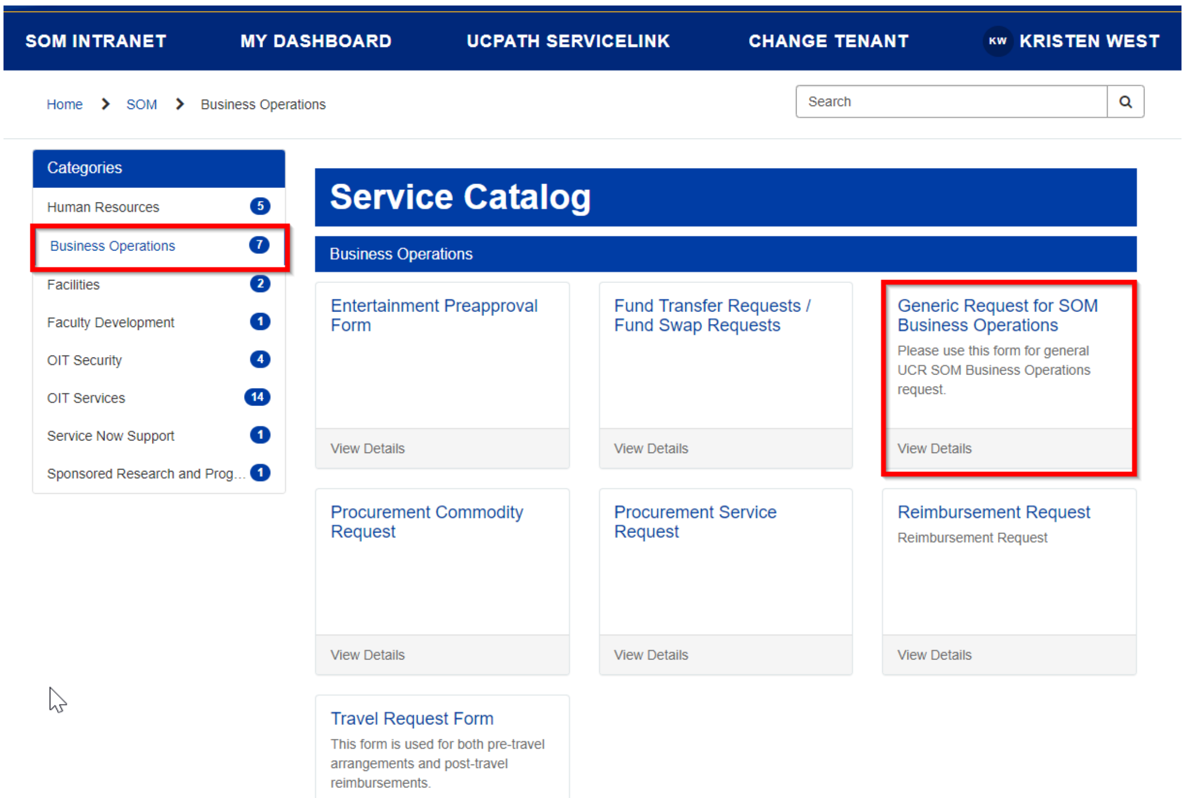
Purpose: The purpose of this document is to outline the process for entering a generic Business Operations request using the ServiceLink form. This process applies to, but is not limited to generic requests such as okay to pay, general questions/ inquiries, status updates of an order, honorarium and stipend requests, patient refunds. **<u>Do not</u> use this form for travel requests, entertainment preapprovals, reimbursement requests, or procurement requests. These types of requests have their own form.**

<u>Entering a request</u>

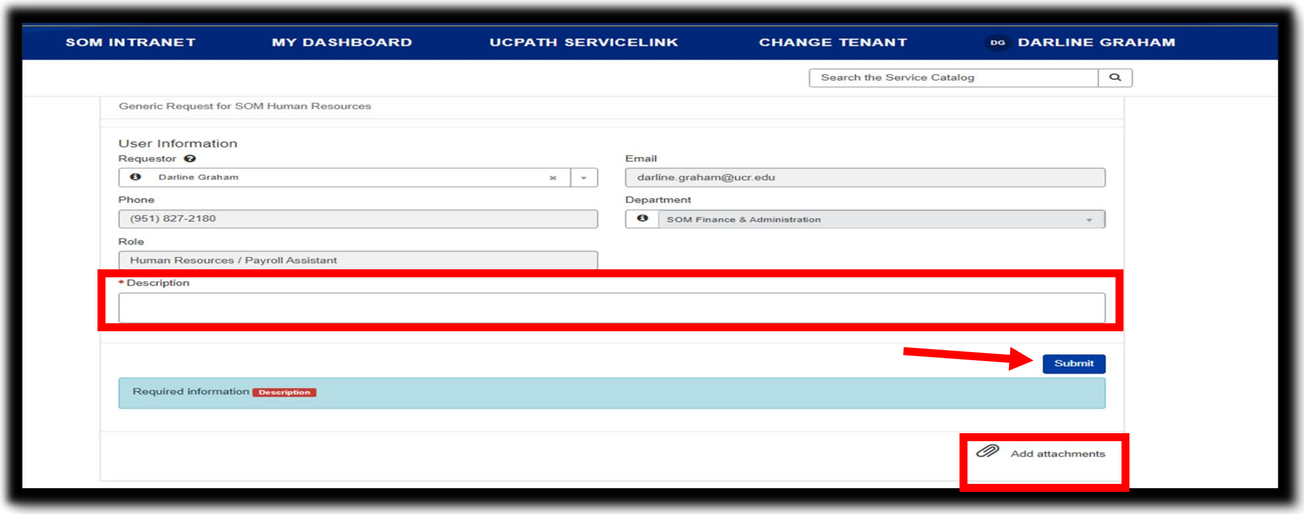
1. On the SOM Intranet Homepage https://medschoolintranet.ucr.edu/ select "ServiceLink Requests- All Departments"



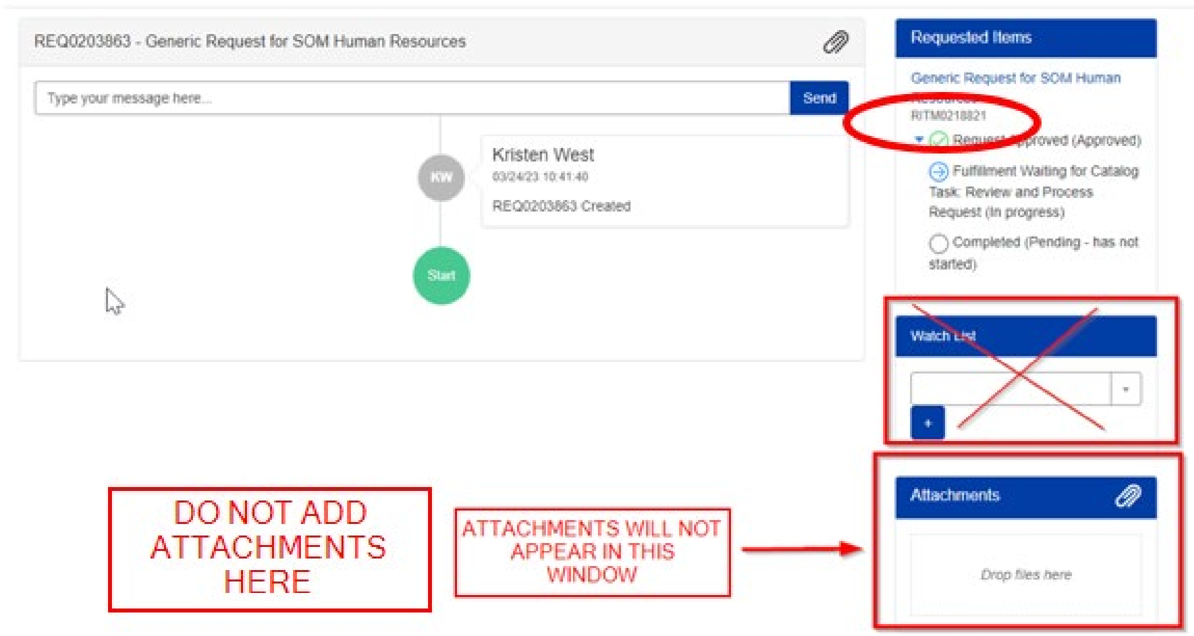
2. In the Categories list, select "Business Operations." In the Service Catalog section select "Generic Request for SOM Business Operations"



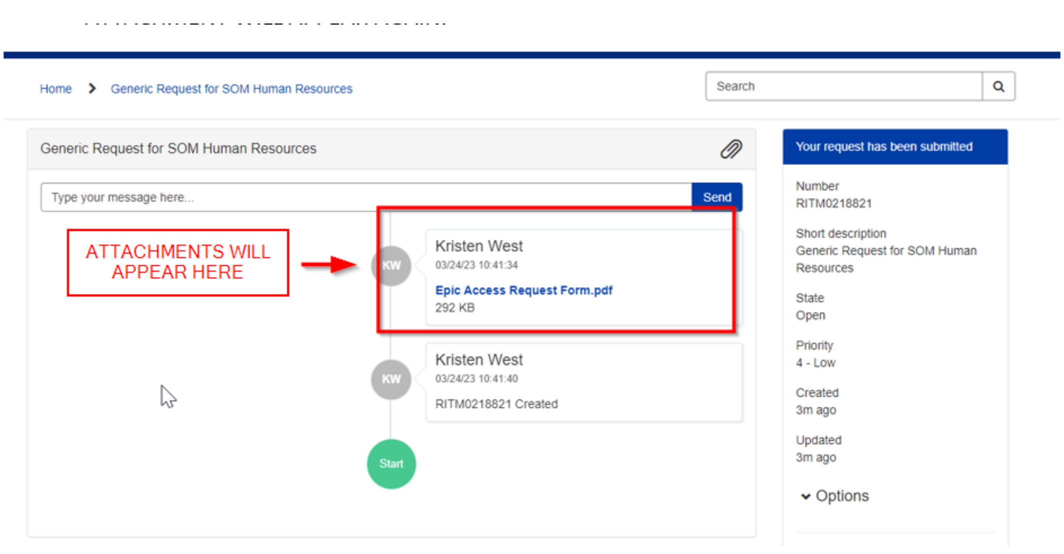
3. Complete the form.
    a. The requestor details will auto populate.
    b. In the Description field enter detailed notes on the type of request.
    c. Add any applicable attachments to the request.
    d. If any request requires someone to be notified, instructions for adding names to the watchlist is detailed in the next section of this user guide.
    e. Once complete, select submit.



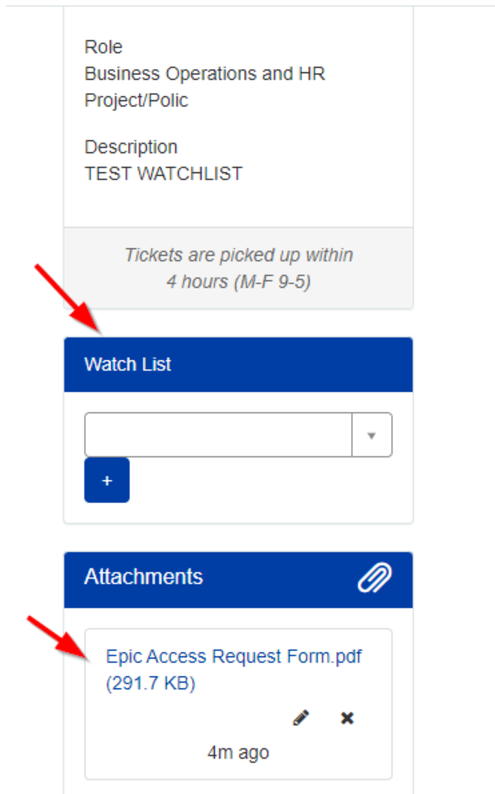
4. After submission the following screen will provide you with the RITM number that was created for the Business Operations Team to review. Note: Do not add someone to the watchlist from this screen. Also, your attachments may not appear from this screen. Click on the RITM number (circled in red below) and this will take you to a new screen.



5. After clicking on the RITM number, the screen pictured below will appear. In this screen the attachments should appear, and additional staff may be added to the watchlist by scrolling down.

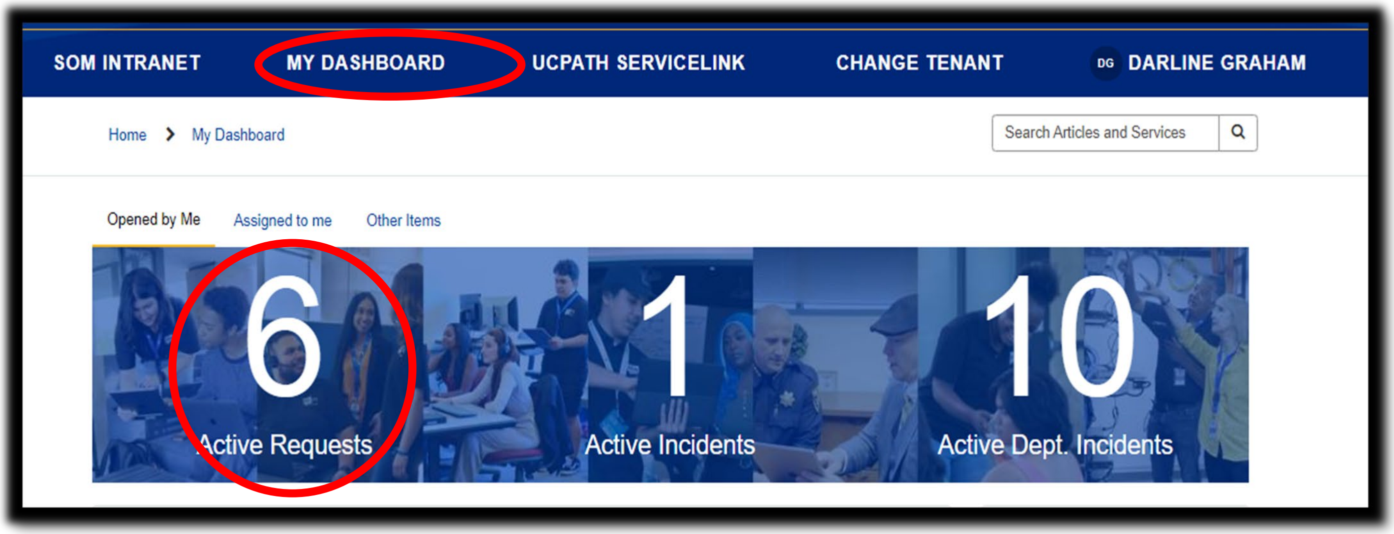


6. Add to the watchlist by typing first name, last name, and plus sign. Any attachments that were previously added will appear in this window. New attachments can be added by clicking on the paper clip on this page.

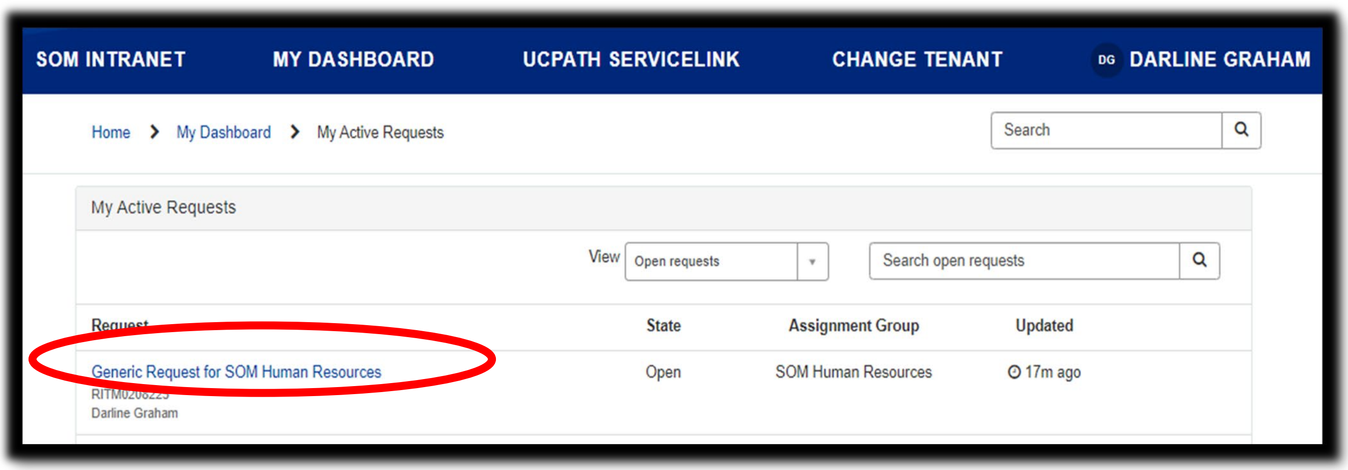


Viewing a Request

1. In the main ServiceLink portal go to “My Dashboard,” select “Active Requests.”



2. All active requests will be displayed. Click on the request.



3. After clicking on the request, the status updates and comments will be displayed.