

How to Submit ErgoCruz Reimbursement Applications

IMPORTANT NOTE: To submit each employee’s complete reimbursement application, please send an email with all required PDF attachments to ergocruz@ucsc.edu.

Please title the email: ErgoCruz Reimbursement Application for Joe Smith (employee’s name)

We cannot accept printed applications or emails that contain multiple applications. An individual application with complete set of forms (as PDF attachments) must be sent for each employee.

The email must contain the following attachments:

- Reimbursement Form (completed)
- Completed Workstation Evaluation Form
- Invoices/receipts
- InfoView Detailed Financial Transaction Report (ledger)

DETAILS:

1. Complete the Reimbursement Program Application Form 2023-2024. This can be downloaded from our Ergonomic Assessor Resources webpage: <https://ehs.ucsc.edu/programs/ergo/ergocruz.html>

2. Attach the Workstation Evaluation Form you completed for the employee in PDF format.

3. Invoices/Receipts: Please obtain PDF versions of receipts/invoices for the specific item(s). These may be in the form of e-invoices from Cruzbuy, invoices (from vendors like Palace, Pivot Interiors, and OneWorkPlace), itemized receipts from other vendors, or Procard statements. Delivery tickets are not acceptable and don’t need to be included.

4. Collect an InfoView Detailed Financial Transaction report from your department’s finance person and highlight each expense for each eligible item. **It must be a PDF printout or screen capture directly from InfoView.** Excel spreadsheets are not accepted. The report must show the complete FOAPAL including the Fund, Organization and Account codes, plus the Activity Code if there is one. The item(s) must be paid off in full (\$0.00 in lien column of the report and showing under the “expensed” column).

Below: Examples of acceptable InfoView Detailed Transaction Reports

Example 1

DETAIL REPORT -- ACTIVITY & ACCOUNT LEVEL 5 CODE

REPORT FOR FY: 2021

BEGINNING: July 01 THROUGH: June 30

DRILL FILTERS: HOOFRN-OFFICE FURNITURE

		BUDGET	EXPENSES	OBLIGATIONS	EXP & OBLIG	BALANCE
3414--HOUSING SERVICES ADMINISTRATION	Doc.Code Doc.Ref					
761996--HSG/SVCS/COMMUNITY SAFETY						
70499--UCHS CENTRAL ADMIN SVCS						
HOOFRN-OFFICE FURNITURE						
006100--FURNITURE (NON-INVENTORIAL)						
06/10/21 Trowbridge Enterprises Inc	I2812892 P0761466	0.00	528.52	0.00	528.52	(528.52)
Total 006100--FURNITURE (NON-INVENTORIAL)		0.00	528.52	0.00	528.52	(528.52)
TOTAL HOOFRN-OFFICE FURNITURE		0.00	528.52	0.00	528.52	(528.52)
Total 70499--UCHS CENTRAL ADMIN SVCS		0.00	528.52	0.00	528.52	(528.52)
Total 761996--HSG/SVCS/COMMUNITY SAFETY		0.00	528.52	0.00	528.52	(528.52)
Total 3414--HOUSING SERVICES ADMINISTRATION		0.00	528.52	0.00	528.52	(528.52)

Example 2: Reimbursement of item purchased from CDW (not Trowbridge Enterprises). Notice that the CDW item is in the expenses column, not the liens column.

Fiscal Year 2024 Transactions by Date As of 10/18/23

UL91 - APPROVED ERGOCRUZ

601003 19900 LIB/S&E
GENERAL STATE APPROPRIATIONS

UL91 - APPROVED ERGOCRUZ

Date	Description	Doc Code	Ref 1	Ref 2	Account	Account Title	Budget	Expenses	Liens	Balance
08/21/23	Trowbridge Enterprises Inc	P0822847			006100	FURNITURE (NON-INVENTORIAL	0.00	0.00	620.71	
08/30/23	CDW Government Inc	EI242981	P0823603	LQ38876	006085	EQUIPMENT-NON INVEN \$200 -	0.00	655.59	0.00	
Total							0.00	655.59	620.71	(1,276.30)
Grand Total							0.00	655.59	620.71	(1,276.30)