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## PEOPLESOFT 9.2 PAYMENT REQUEST APPROVAL

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## PAYMENT REQUEST APPROVAL SECURITY

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### PEOPLESOFT ONLINE APPROVAL FOR DEPARTMENT FORM 9.2

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Security for Payment Request Approval is granted via the [PeopleSoft Online Approval For Department 9.2 Form](#).

The approvers for that department(s) listed in the Payment Request will be notified based on this form.

## PAYMENT REQUEST OVERVIEW

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Payment Requests should be opened for:

- Invoices less than \$600, that are **\*NOT\*** recurring
- Miscellaneous reimbursements (out of pocket expenses that are **\*NOT\*** Travel)
- Tuition Reimbursement
- R\*STARS Payments
- Honorariums
- Stipends
- Refund of Revenue
- Memberships (where P-card is not accepted)
- Registrations (where P-card is not accepted)
- Student Cultural Events (where P-card is not accepted)
- Alcohol (PO's cannot be opened for alcohol related purchases)

Payment Requests should **\*not\*** be opened for:

- Invoices over \$600
- Travel Expenses (when using accounts 7040100, 7040300, 7040330, etc.)

## STEP1: APPROVAL NAVIGATION OPTIONS

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### APPROVAL FROM EMAIL

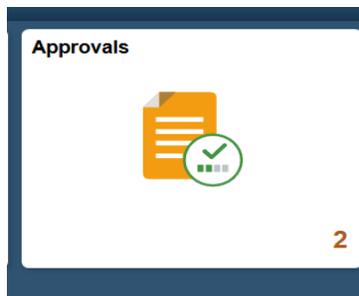
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If an Approver is NOTIFIED via email, the email link will direct the approver to the exact transaction to approve.

### APPROVAL FROM APPROVAL TILE

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Approver may also access the “Approval Tile” via this navigation: **From Employee Self Service Home Page>Approvals Tile**. The “Approval Tile” below has 2 pending item for Approval as indicated by the number in lower right corner.



Clicking on the “Approval Tile” will bring the Approver to see the list of Pending Items. This screen will display summary information.

If there are different types of Pending Items for approval, the type and number of Pending items will be listed.

# APPROVAL STEPS

## STEP 2: REVIEW PENDING ITEM SUMMARY

The full screen will show the Description of the all Pending Items.



The approver can click on the **Payment Request** item on the left to filter Payment Request only, shown below:



- Transaction Type = Payment Request
- Amount, USD
- The Payment Request ID = 0000000097
- UMBC1 is business unit
- Person that keyed this transaction
- Routed is the date it was routed to the approver

## STEP 3: REVIEW PENDING DETAIL / ATTACHMENTS

The approver can click on the Pending Item to review the details. The details appear below:

The screenshot shows the 'Payment Request' details page. At the top, there is a navigation bar with 'Pending Approvals' and 'Payment Request'. Below this, the amount '25.00 USD' is displayed. On the right side, there are three buttons: 'Approve' (green), 'Deny', and 'More'. The main content area is divided into sections: 'Summary', 'Line Details', and 'More Information'. The 'Summary' section contains fields for Request ID (000000097), Invoice Number, Supplier ID (000000002), Supplier (BRANDYWINE PRESS INC), Business Unit (UMBC1), Invoice Date (03/10/18), Entered By (Ken Griggs), and Description (Veggie Tray Example). The 'Line Details' section is a table with columns: Line, Item, Description, Quantity, UOM, Unit Price, and Amount. The table contains one row: Line 1, Item, Description 'Veggie Tray', Quantity 1, UOM 'EA', Unit Price '25.00 USD', and Amount '25.00 USD'. Below the table is a 'More Information' section with a 'View Attachments (1)' link and an 'Approver Comments' text area. At the bottom, there is an 'Approval Chain' link.

'View Attachments' will present the attachments that the entry person included. The business process is outlined on the [Payment Requests in 9.2](#) website, which outlines the specific type of attachments per Payment Request type.

## FINAL STEP: ACTION

### APPROVAL

The next step is to approve the transaction by clicking the green "Approve" Button in the upper right corner. A smaller Approval Box appears, then Submit.

This screenshot is identical to the previous one, but the 'Approve' button is highlighted in green, indicating it is the next step in the process.

The approval dialog box is shown. It has a title bar with 'Cancel', 'Approve', and 'Submit' buttons. The main text reads: 'You are about to approve this request.' Below this is a text area labeled 'Approver Comments'.

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## DENY TRANSACTION

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The same Steps are followed if a transaction is Denied.

**Please include SPECIFIC explanation in the Deny Comments for the Entry person.** The Entry person will receive an email with a link to access this transaction.



A screenshot of a web application dialog box titled "Deny". The dialog has a light gray background and a white border. At the top left is a "Cancel" button, at the top right is a green "Submit" button, and in the center is the word "Deny" in orange. Below the title bar, the text "You are about to deny this request." is displayed. Underneath is a text area labeled "Approver Comments" with a vertical cursor at the beginning. The entire dialog is enclosed in a thick black rectangular border.

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## OPTIONAL STEP: AD-HOC

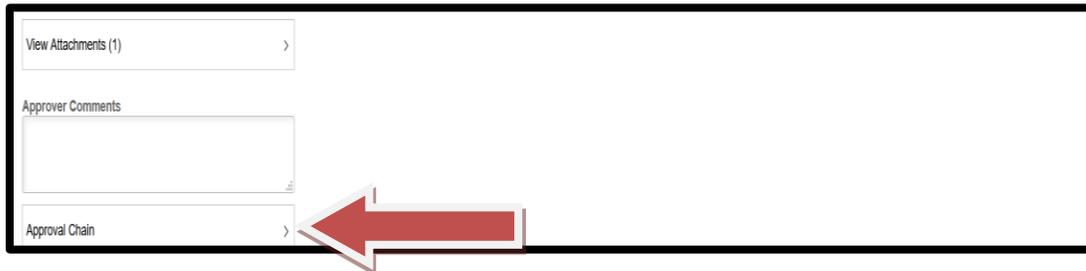
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### AD-HOC APPROVAL

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An approver may also choose to add an Ad-Hoc Approver or Ad-hoc Reviewer to the Approval Chain. Ad-hoc Approver requires that the person that is added approve the transaction.



A screenshot of a web application interface showing three sections: "View Attachments (1)", "Approver Comments", and "Approval Chain". Each section has a right-pointing chevron icon. A large red arrow with a white outline points from the right towards the "Approval Chain" section, specifically highlighting a small button used for adding ad-hoc approvers. The entire screenshot is enclosed in a thick black rectangular border.

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### AD-HOC REVIEW

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An approver may also choose to add an Ad-hoc Reviewer to the Approval Chain. The pending item is sent to the Ad-hoc Reviewer for 'information only' and requires no "Approval" Action.