PEOPLESOF 9.2 PAYMENT REQUEST APPROVAL

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PAYMENT REQUEST APPROVAL SECURITY

PEOPLESOFT ONLINE APPROVAL FOR DEPARTMENT FORM 9.2

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

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

APPROVAL FROM EMAIL

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

APPROVAL FROM APPROVAL TILE

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:

'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.
DENY TRANSACTION

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.

OPTIONAL STEP: AD-HOC

AD-HOC APPROVAL

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.

AD-HOC REVIEW

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.