## **Approving a Payment Request**

Approval will be emailed to an Approver and can be accessed via the link in the **approval email**, through the **worklist** or via **navigation** in PeopleSoft.

Navigation.	Accounts Pa	vable > F	Payments >	Payment Re	equest > Pa	wment Reque	st Approval
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CASE WESTERN RESER						1000 C		_
EST EST	WE 1816	Navigator - Search	<u>&gt;</u>	Advanced Search 📓 Las	t Search Results	Add Tr	s → 🔽 Notificatio	n Nav
		D				New Wind	tow Help Person	nalize Pag
		Payment Req	uest					
Business Unit CASE1 Request ID 00000000	81	Invoice Number 123458 Invoice Date 12/10/2018	Entered By Entered Datetime	Gregor,Karen 12/10/2018 9:42AM				
nent Request Details								
Transaction Currency USD Total Amount 6000.00		Supplier ID 0000019801 Description Tourist Supplier Name James B Young	Comments	Attachments (1) Payment Message	13			
e Details			Pers	onalize   Find   🖉   🔤	First & tof 1 @ Las			
Quantity Unit Price	Item ID	Amount	Description	SpeedChart Key	Details			
1		600	0.00 Line Description		Details			
ae - SQL - Mar 1								
Pending Multiple Approvers CW-PR_APPR_USER_MORT	00041:Pendin	g 💽 Start New Path						
ge - SQL - Mgr 2								
· REQUEST_ID=00000	00041:Awaitir	ig Further Approvals						
Path -SOL - Mgr 2 Not Routed Lawyer, John CW_PR_APPR_USER_I	IGR28	Path						
pay Auditor								
* REQUEST_ID=00000	00041:Awaitir	ng Further Approvals						
Prepay Auditor								

- 1. Review the basic Payment Request, Amount and Supplier information at the top of the page.
- 2. To see details about the Supplier you can hover your mouse cursor over the underlined Supplier name.

Supplier ID	0000019801	Comments	
Description	Test 123		
Supplier Name	James B Young MD		Attachments
Amount	James B Young N Short Name Phone Email Location	MD YOUNG JAME-002 REMIT 17360 Old Tannery Trail Chagrin Falls, OH 44023	ICI
+	Email Location	REMIT 17360 Old Tannery Trail Chagrin Falls, OH 44023 United States	

3. You can review any comments that have been added in the Comment box.

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4. Click the Attachments hyperlink to view the supporting documentation.

Payment Request Attachments					Help
Request ID 0000000041 Ent	tered Datetime 12/10/2018 9:42AM				
Details					
Attached File	Description	User	Name	Date/Time Stamp	
094.JPG	Test Attachment	kag4	Karen Gregor	12/10/2018 9:49:33AM	
Add Attachment					
OK Cancel					

- You can review the details of who added the attachment and when it was added.
   Click the view icon (<sup>(E)</sup>) to open the attachment in a new window.
- 6. Close the page and return to the Payment Request.
- 7. To send a message to the creator of the Payment Request click the Payment Message link (*this link is not for adding a message that will appear on a check*).

lessage Details		
Initial Date Time 12/10/2018 10:46:19AM	Supplier SetID CASE1	
Request ID 000000041	Supplier ID 0000019801 James B Young MD	
Requester Gregor,Karen	Request Status Pending	
Request Created Datetime 12/10/18 10:06AM	Gross Invoice Amount 6000.00 USD	
Message Details		
Datetime 12/10/2018 10:46AM		
Originated From Demes, Francis A	Message To Gregor,Karen	
*Conversation Topic		
Message		
Your Response		
	8	

- 8. Add a conversation topic and enter the message in the Your Response box.
- 9. Click Post.
- 10. Click the Details link on the Line.

Рауп	nent Request Dis	stributions												3
				P	avment Rec	uest								Help
	Reques: L	t ID 0000000041 Ine 1												
Acco	unting Details													
Line	Quantity	Amount	GL Business Unit	Account	Alt Acct	Operating Unit	Fund Code	Department	Program Code	Class Field	Budget Reference	Product	Project	PC Business
	1	6000.00	CASE1	101770			12000	200000		10			RES122255	
0	K Cancel	_												
<.														•

- 11. Review the Chartfield Entry string.
- 12. Click OK.

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13. If needed add Approver Comments and click the Add Comments button. Once added the comment button will show there is a comment by the bubble showing filled in your section. Click the icon () to view the comment.

Stage - SQL - Mgr 1
REQUEST_ID=0000000041:Pending       Image: Start New Path
Path - SQL - Mgr 1
Multiple Approvers         CW_PR_APPR_USER_MGR1
Comments
Francis A Demes at 12/10/18 - 10:56 AM Approved by fxd67
Stage - SQL - Mgr 2
REQUEST_ID=000000041:Awaiting Further Approvals Start New Path
Path -SQL - Mgr 2
Not Routed       Lawyer, John       CW_PR_APPR_USER_MGR2B
Prepay Auditor
REQUEST_ID=0000000041:Awaiting Further Approvals New Path
Prepay Auditor
Not Routed            Multiple Approvers CW_PR_APPR_USER_PREPAY_AUDITOR
254 characters remaining
Approve Deny Pushback Add Comments Hold

- 14. Click the **Approve** button to approve the Payment Request.
- 15. Click the **Deny** button to deny the Payment Request. This will send the Payment Request back to the creator. They have the choice to update and re-submit the Payment Request or they can cancel it.
- 16. Click Hold to place a hold on the Payment Request.