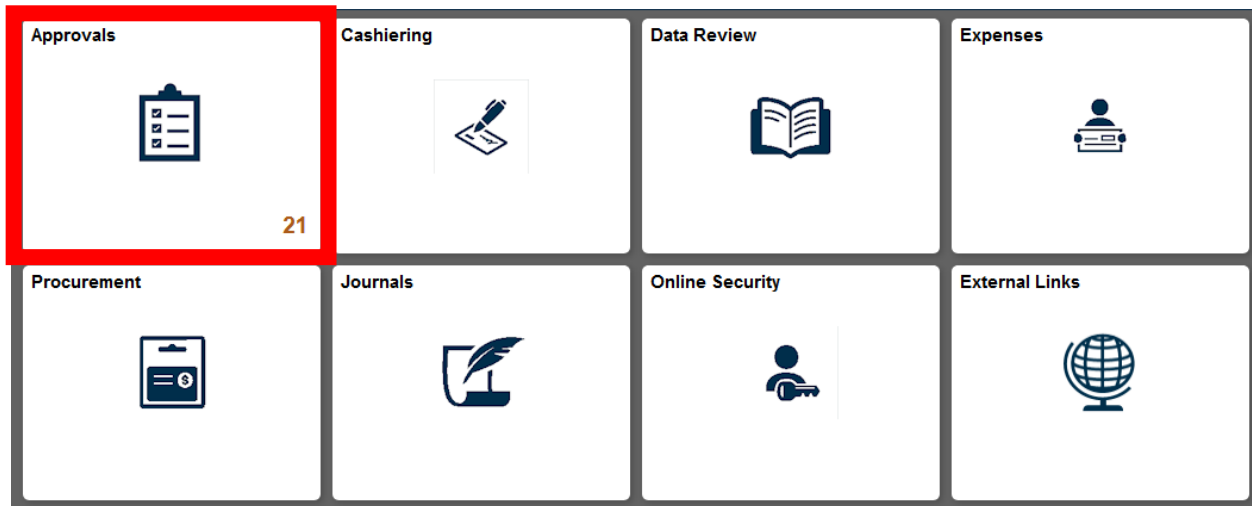


PeopleSoft - Approving a Payment Request

Concept

This business process explains how to approve a payment request.

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



1. If using the tile, select the report from the list.

The screenshot shows the 'Payment Request' interface. At the top, there's a navigation bar with 'Pending Approvals' and 'Payment Request'. Below that, the amount '100.00 USD' is displayed. There are three buttons: 'Approve' (green), 'Deny', and 'More'. The 'Summary' section contains the following information:

- Request ID: 0000013271
- Business Unit: CASE1
- Invoice Number: [blank]
- Invoice Date: 07/15/20
- Supplier ID: 0000182057
- Entered By: Williams, Steve
- Supplier: Smith, John
- Description: STUDY PARTICIPANT
- Request Type: Payment Request
- Return Check To: RE

The 'Line Details' section shows a table with one line item:

Line	Item	Description	Quantity	UOM	Amount
1			0		100.00 USD

Below the table, there are sections for 'More Information' (View Attachments (1)), 'Payment Request Header Detail - 3', 'Approver Comments' (with a text box), and 'Approval Chain' (with a dropdown arrow).

2. Review the basic Payment Request, Amount and Supplier information at the top of the page.
3. You can review any comments that have been added in the Comment box.
4. Click the Attachments hyperlink to view the supporting documentation.

The screenshot shows the 'View Attachments' window. The title bar says 'View Attachments' with a close button. Below the title bar, the 'Request ID 0000013271' is displayed. The main content area is titled 'Attachments' and contains a table with the following data:

Sequence	Attached File	Attachment Description	Entered By
1	BOJIC.pdf		Williams, Steve

5. You can review the details of who added the attachment and when it was added.
6. Close the page and return to the Payment Request.
7. To Review the Speedtype Info click on the Line.

Fluid Approval Distribution

Line 1

Description

Merchandise Amt 100.00 USD

Quantity

1 row

Distribution Line	Quantity	Merchandise Amount	*Speed Type	*Account	Project	Event	Fund Code	Department	Class
1		100.00	RES514816	533770	RES514816		96010		10

8. Review the Chartfield Entry string.
9. Close the window.

10. If needed add Approver Comments and in the approver comment box.

▼ Payment Request Header Detail - 3

Approver Comments

Approval Chain >

11. To view the Approval Chain select the Approval Chain box.

Approval Chain ✕

Department Approver

▼ REQUEST_ID=0000013271 Approved

Department Approver

✓ **Approved**

Reagan, Dan
CW_PR_APPR_USER_MGR1
07/15/20 11:03 AM >

Prepay Auditor

▼ REQUEST_ID=0000013271 Pending

Start New Path

Prepay Auditor

⌚ **Pending** +

Multiple Approvers
CW_PR_APPR_USER_PREPAY_AUDITOR >

12. Click the **Approve** button to approve the Payment Request.

13. 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.

14. To put the request on hold: Click the more button and select **Hold** from the drop down list.