PeopleSoft Payables

PAYMENT REQUESTS *(DIRECT PAY)*

APPROVER GUIDE

AUGUST 2025

VERSION CONTROL

Version	Date	Task	Owner	Description
0.1	02/01/2019	Create	Barbara Doss	Document Creation
0.2	02/15/2019	Update	Barbara Doss	Update
0.3	02/27/2019	Review	Barbara Doss	Review by Lori Garcia, Ulander Holloway, Steven McAlister, Barbara Doss
0.4	03/07/2019	Update	Barbara Doss	Update after 2/20/2019 Review
0.5	04/11/2019	Update	Michele Gonzales	Review/Update
0.6	04/23/2019	Update	Barbara Doss	Add *Scanning W-9s*. Add *New Supplier Requests* Add *Accounts to Use*
0.7	05/01/2019	Review	Steven McAlister Lori Garcia Michele Gonzales	Review/Update
1.0	05/03/2019	Approve	Steven McAlister Michele Gonzales	Approved – Ready for Duplication
1.1	09/10/2019	Update	Barbara Doss	Add *Account 566810* to Accounts to Use
2.0	03/18/2020	Update	Barbara Doss	Add "*PR not viewable in the AP lookup screens after voucher build*" to "FAQ - Frequently Asked Questions - Payment Request Vouchers."
2.1	03/18/2020	Update	Barbara Doss	Update for PeopleTools 8.57.09, App 9.2, Image 27.
2.2	03/18/2020	Update	Barbara Doss	Add *"Product Code"* to Step 3 – Invoice Details
3.0	03/18/2020	Update	Barbara Doss	Ready for Duplication
3.1	08/05/2020	Update	Barbara Doss	Re-write to include: *1. New Ad Hoc Approver workflow path.* *2. Add 2nd approval level for Purchasing* *3. Document New Policy for* *a. Account Exclusion*
3.2	09/01/2020	Review	Barbara Doss	Review by Lori Garcia, Steven McAlister and Michele Gonzales
3.3	09/14/2020	Update	Barbara Doss	Add *Pushback* steps for Ad Hoc and Purchasing Approvers.
3.4	09/21/2020	Update	Barbara Doss	Add *5394XX-Utilities* as Excluded Accounts
4.0	10/12/2020	Update	Steven McAlister	Approved – Ready for Duplication

Version	Date	Task	Owner	Description
4.1	10/26/2020	Update	Barbara Doss	Re-number Version Control Add: 1. *Skipped Payment Requests* 2. *Approval Timeouts – NEM process update*
5.0	06/22/2023	Update	Barbara Doss	Update for PeopleTools 8.59.05 – FLUID
5.1	06/23/2023	Review / Update	Barbara Doss	Update sections: 1. *Adding AD HOC Approvers* 2. *Self Approvals* 3. *Missing Department Approvers* 4. *Pushback* 5. *FAQ's contact information.* Final PS Support Review Submit to S. McAlister for review and approval.
6.1	08/13/2025	Update	Barbara Doss	PUM 51 Upgrade

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What's New (PUM51 Upgrade) May 2025

- ✓ Added the Payment Address field in the Supplier Information page. *(Requesters)*
- ✓ Added an option to edit the supplier payment address while creating or updating payment request transactions. *(Requesters)*
- ✓ Added the Delegation Framework feature for Payment Requests. (*Approvers – Future Availability)*
- ✓ Validate duplicate invoice numbers before submission, review and approval of a request. *(Requesters)*
- ✓ Fluid Payment Request template to include new fields: Handling Code, Payment Message, and Separate Payment. *(Requesters)*
- ✓ Requesters can now update payment requests until the transaction has been fully approved. *(Requesters)*
- ✓ Requesters can now create a new request by copying from an existing request. *(Requesters)*

OVERVIEW

The PeopleSoft Payment Request process replaces the current process for Direct Pay (non-purchase order) requisitions. The process follows a systematic pathway to assist you in entering all required data and attachments to request a payment.

Roles & Responsibilities

Once a Requester submits a payment request, the Direct Pay Reviewer will review the document for accuracy before submitting the request to the appropriate approver via workflow/email.

Payment Requests **MUST** be approved by the Department Approver, Ad Hoc Approver *(if applicable)* **AND** Purchasing Approver before payment processing can occur.

Payment Request roles include:

- ✓ **Requester** – Creates the Payment Request (*Formerly known as a Requisition*)
- ✓ **Reviewer** – Direct Pay user responsible for reviewing and identifying missing information before submitting for Department approval.
- ✓ **Department Approver** – Ensure all of the information on the transaction is correct before approving and/or adding an Ad Hoc Approver if applicable. This includes account and amount restrictions. After approving, if there is no Ad Hoc Approver, the Payment Request is sent to Purchasing for final approval.
- ✓ **Ad Hoc Approver –** Generally added by the Department Approver for additional approval at the department level for amounts of $10,000 or greater. Other reasons determined by the Department Approver may apply.
- ✓ **Purchasing Approver** – Ensure all of the information on the transaction is correct before approving or adding an Ad Hoc Approver. Once approved, the record is ready for a voucher to be built.
- ✓ **Admin** – Reviewer (*Only when necessary to troubleshoot problems*.)

Policy – Types of Purchases Not Allowed

These payments require an electronic prepared requisition with proper back up and manual signature approvals.

- Payments requiring the Legal Department approval and signature
- Payments for Research/Protocol
- Payments for Moving Expenses
- Payments for Travel
- Payments for Utilities

Any Payment Request containing the above ***excluded*** activities will be deleted.

The Reviewer will send an email to the Requester notifying them that the Payment Request is being deleted with the reason for the deletion.

Chartfield Data Requirements

For all accounts *except* accounts that start with 222XXX *and those excluded above*, the Fund code requirements are as follows:

- **Fund 111** – Account, Fund, Department, Program and Class
- **Fund 115** – Account, Fund, Department, Program and Class
- **Fund 112** – Account, Fund, Department, Program, Class,
  PC BU of ***LSUSH***, Project ID and Activity ID of ***1***
  Note: *If there is no Project ID, there should be no Activity ID.*
- **Fund 113** – Account, Fund, Department, Program, Class,
  PC BU of ***LSUSH***, Project ID and Activity ID of ***1***
  Note: *If there is no Project ID, there should be no Activity ID.*
- **Fund 414** – Account, Fund, Department, Program, Class,
  PC BU of ***LSUSH***, Project ID and Activity ID of ***1***
  Note: *If there is no Project ID, there should be no Activity ID.*

Accounts that start with "222XXX"

- **Fund 111** – Account, Fund, and Department

Account 514000 and Department ID 1980003 (combo)

- **Fund 111** – Account, Fund, and Department

Document Retention

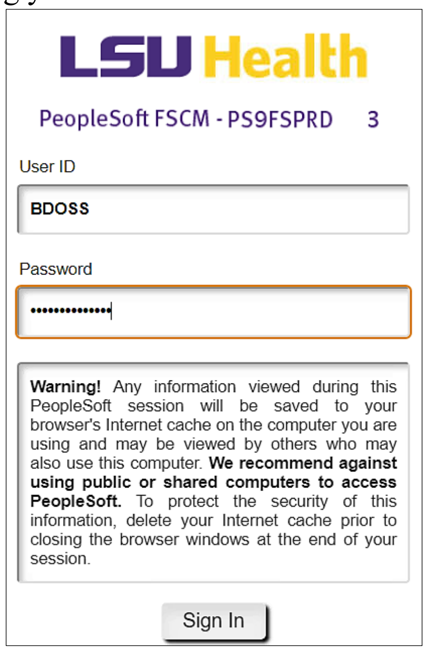
The Department submitting the payment request is required to keep the original documentation in accordance with *LSUHSC Records Retention* policy.

MANAGING PAYMENT REQUEST APPROVALS

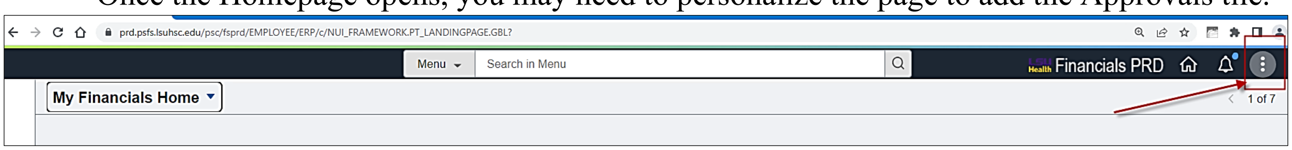
Adding the Approval tile to your Homepage

NOTE: This is a one-time setup

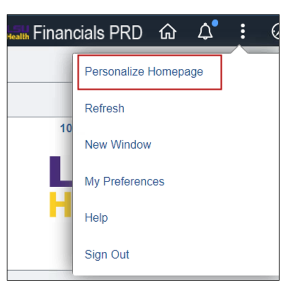
Log on to PeopleSoft using your network User ID and Password

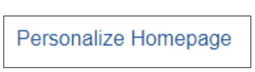


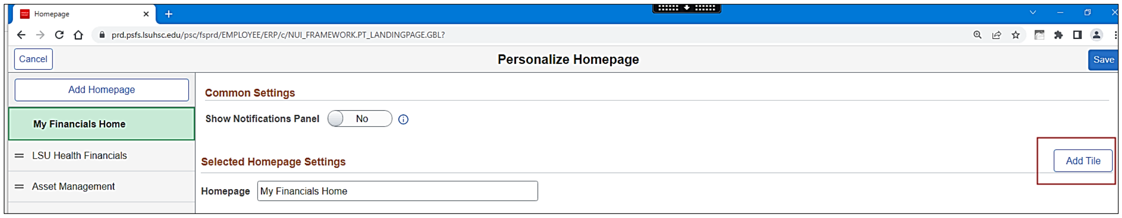
Once the Homepage opens, you may need to personalize the page to add the Approvals tile.



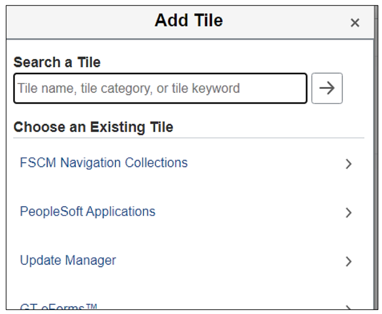
Click the eclipse (three stacked dots) 



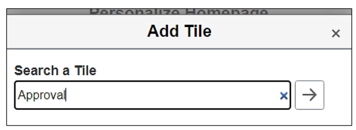
Select 



Select Add Tile

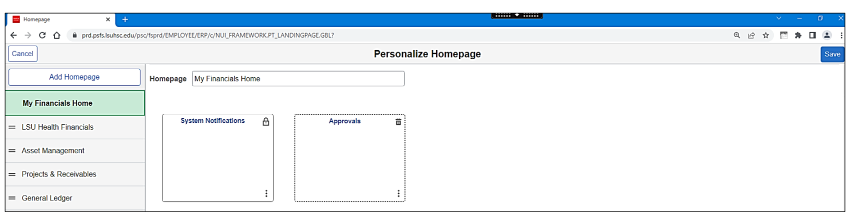


Enter the word "***Approval***" in the **Search a Tile** box.



Click the →

Select Approvals



Click Save

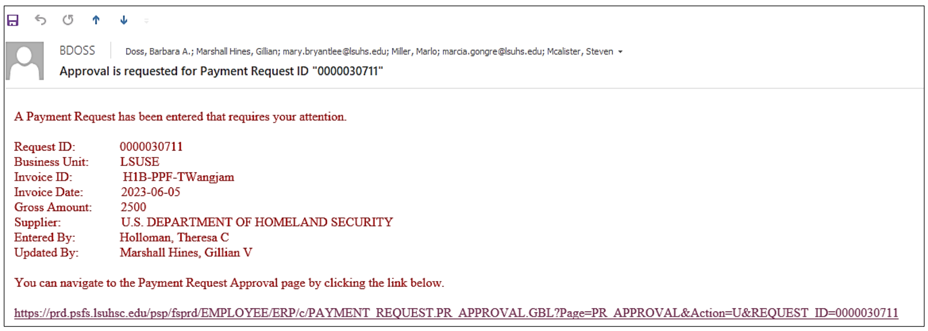
You will be returned to you Homepage. The *Approvals* tile is now available.

APPROVING PAYMENT REQUESTS

Approving a Payment Request via Email

Once the review step is complete, you will receive an email, similar to the one below, requesting approval.

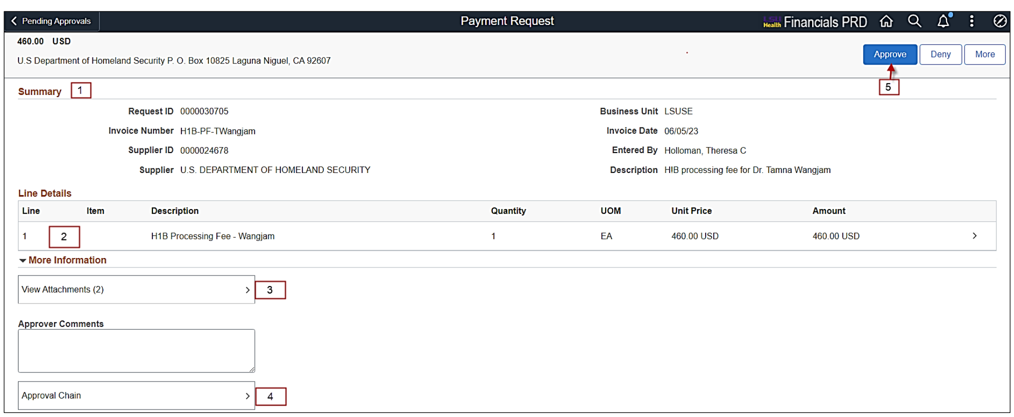
The "sender" address is ***PeopleSoft_FS_Accounts_Payable@lsuhsc.edu*.**



Begin your approval process by clicking the link in the email.

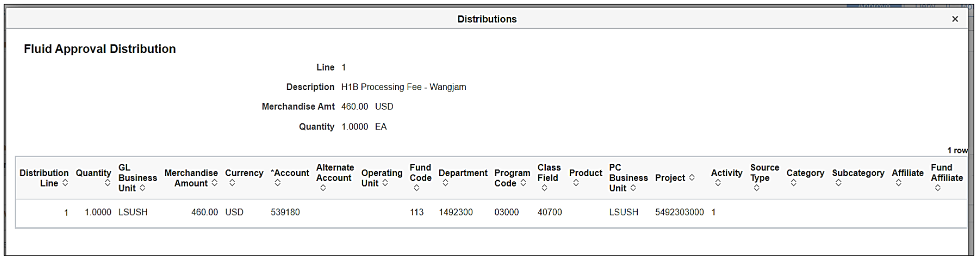
Log on to PeopleSoft Financials by entering your regular network User ID and Password.

The Payment Request Approval page will display.



You can now do the following:

1. Review ***Summary***
   Confirm that the *Summary* information is correct.
2. Review ***Line Details***.
   Click the line to see the Chart-field distribution and confirm its accuracy.


Distributions

Fluid Approval Distribution

Line 1
Description H1B Processing Fee - Wangjam
Merchandise Amt 460.00 USD
Quantity 1.0000 EA

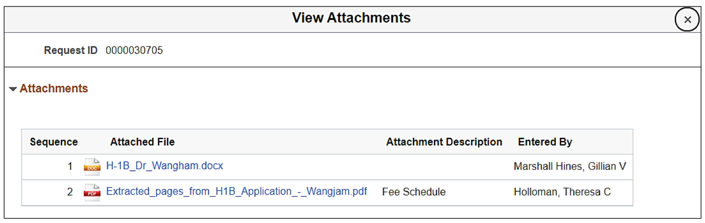
1 row

Distribution Line	Quantity	GL Business Unit	Merchandise Amount	Currency	*Account	Alternate Account	Operating Unit	Fund Code	Department	Program Code	Class Field	Product	PC Business Unit	Project	Activity	Source Type	Category	Subcategory	Affiliate	Fund Affiliate
1	1.0000	LSUSH	460.00	USD	539180			113	1492300	03000	40700		LSUSH	5492303000	1					

Click the ✕ to close the *Distributions* page.

3. ***Attachments***

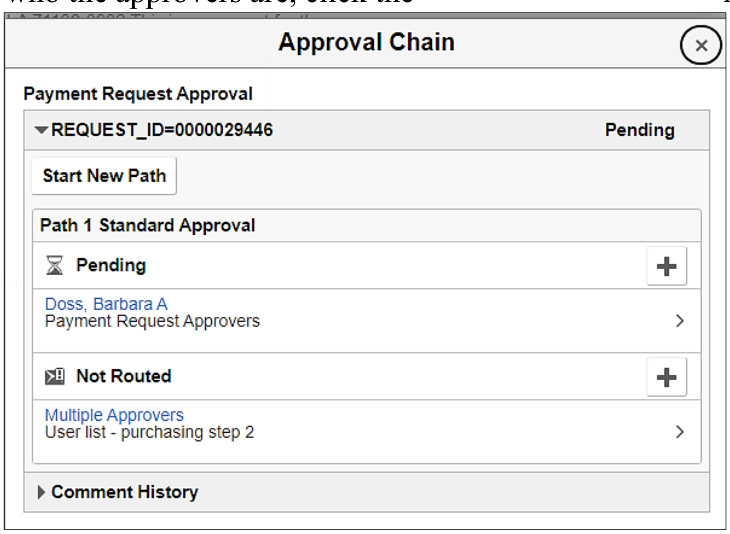
   Click View Attachments (2)



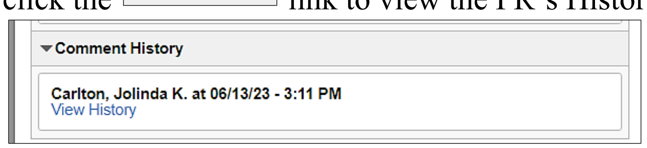
   Once you are done with reviewing the attachments, click the ⓧ to close the *View Attachments* page.

4. ***Approval Chain***

   To review who the approvers are, click the Approval Chain link.

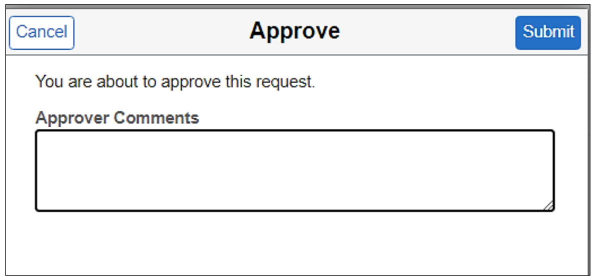


   You can also click the Comment History link to view the PR's History if desired.



5. ***Approve***

If all information is accurate, you can approve the Payment Request by clicking the Approve link



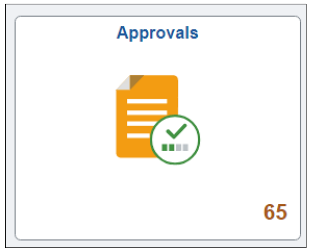
You can add comments if desired, but *Comments* at the time of *Approval* are not required.

Click Submit

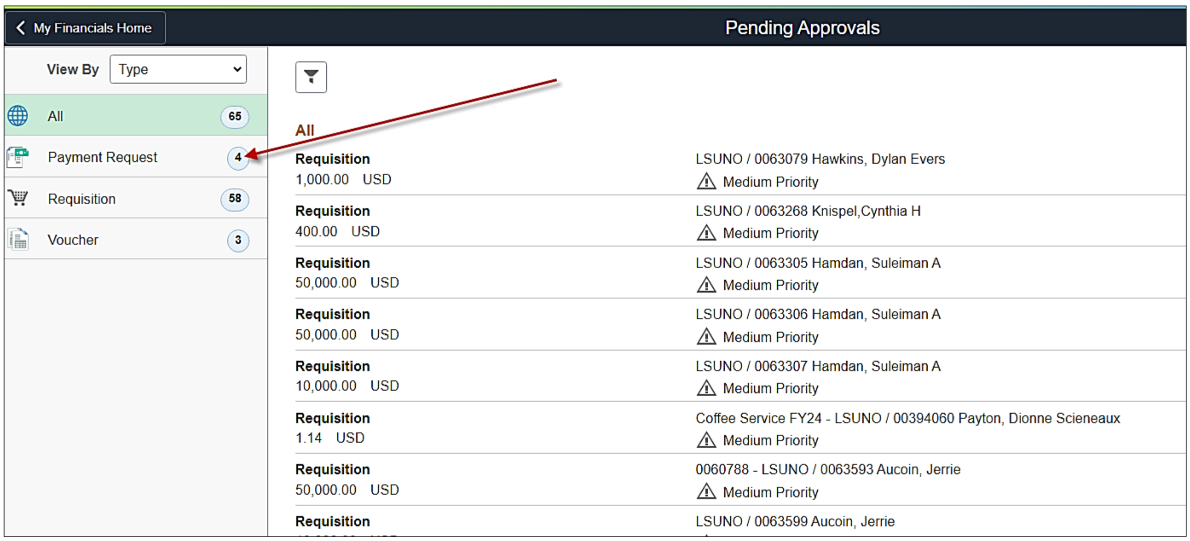
You will receive a very quick message that the *Payment Request has been approved*.

Note that the number of Payment Requests to approve is reduced in the menu.

Approving a Payment Request via the Approvals tile

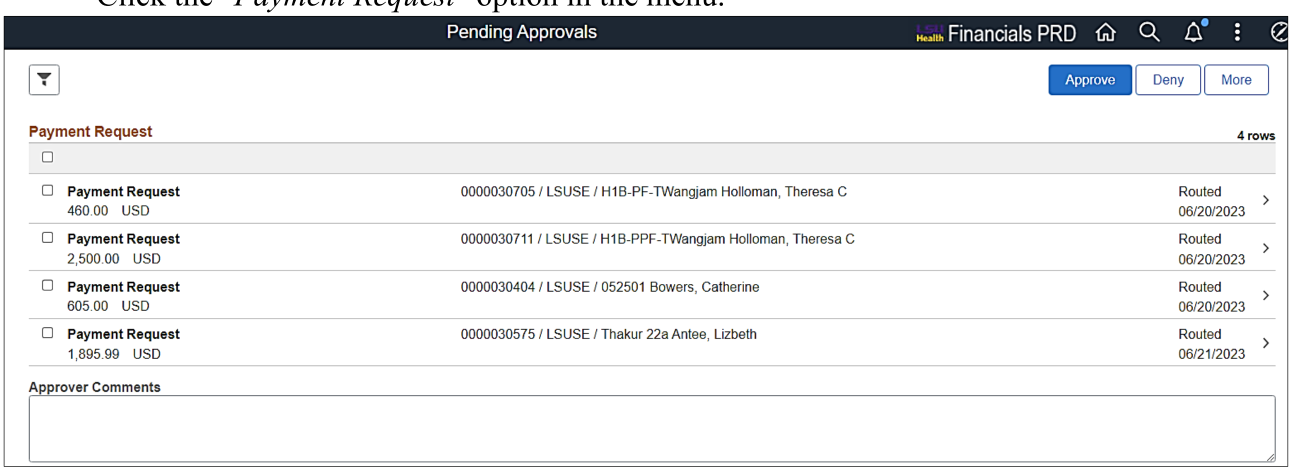


After logging into PeopleSoft, select the Approvals tile from your Homepage.



Once the *Approvals* tile is open, you can see everything that has your name on it to approve.

Click the "*Payment Request*" option in the menu.



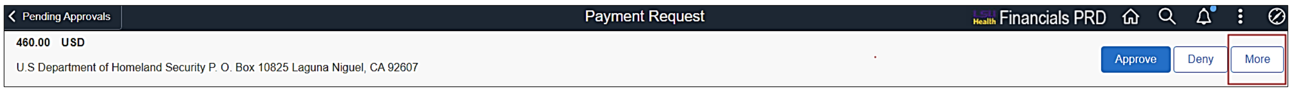
Select a *Payment Request* to review/approve.
Proceed with your review and approval.

You can now do the following:

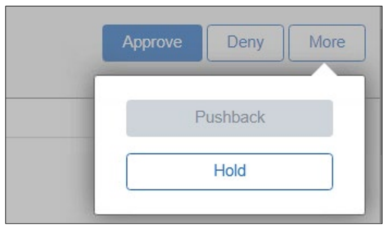
Note that the number of Payment Requests to approve is reduced in the menu Payment Request list.

PLACING A PAYMENT REQUEST ON HOLD

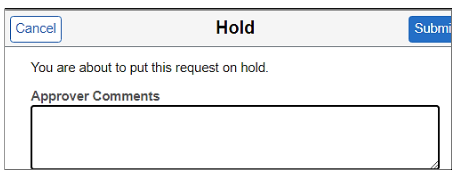
Comments are ***REQUIRED*** for *Hold's*.



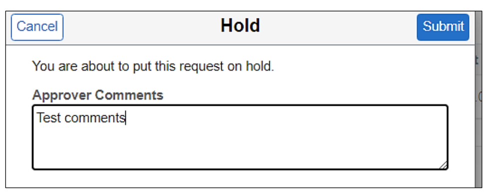
Click the More link.



Select the Hold option.



Enter your comments in the Approver Comments text box.

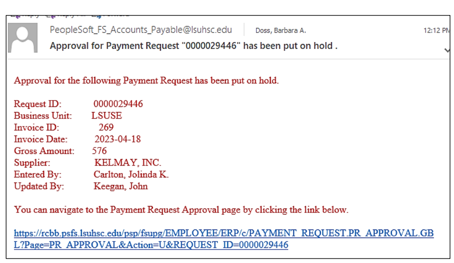


Click Submit.

You will get a quick message: "*You have put the request on hold.*"

An email is sent to the Administrators notifying them that the Payment Request has been placed on *Hold*.

Administrator ***HOLD*** *Email sample*


PeopleSoft_FS_Accounts_Payable@lsuhsc.edu | Doss, Barbara A. | 12:12 PM

Approval for Payment Request "0000029446" has been put on hold .

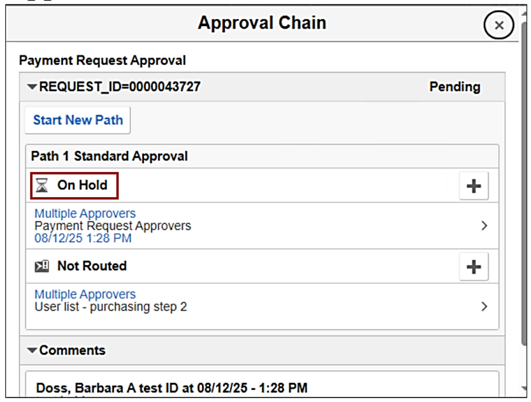
Approval for the following Payment Request has been put on hold.

Request ID: 0000029446
Business Unit: LSUSE
Invoice ID: 269
Invoice Date: 2023-04-18
Gross Amount: 576
Supplier: KELMAY, INC.
Entered By: Carlton, Jolinda K.
Updated By: Keegan, John

You can navigate to the Payment Request Approval page by clicking the link below.

https://rcbb.psfs.lsuhsc.edu/psp/fsupg/EMPLOYEE/ERP/c/PAYMENT_REQUEST.PR_APPROVAL.GBL?Page=PR_APPROVAL&Action=U&REQUEST_ID=0000029446

To see Comments and approvers, click the Approval Chain link.

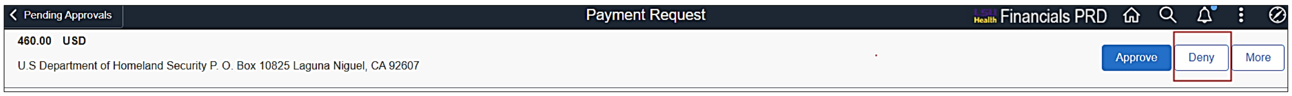


Note that the Payment Request is still available for approval and can be approved without taking the Payment Request off Hold.

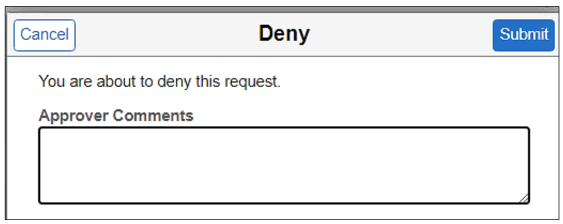
When you are ready, you can click the Approve link to approve the Payment Request.

DENYING A PAYMENT REQUEST

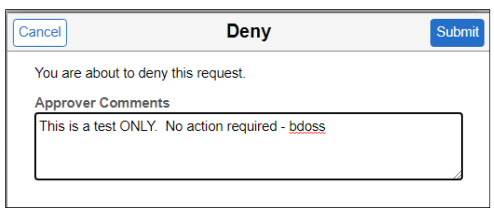
Comments are **REQUIRED** when denying a Payment Request.



If a Payment Request needs to be denied click Deny link.



Enter comments.



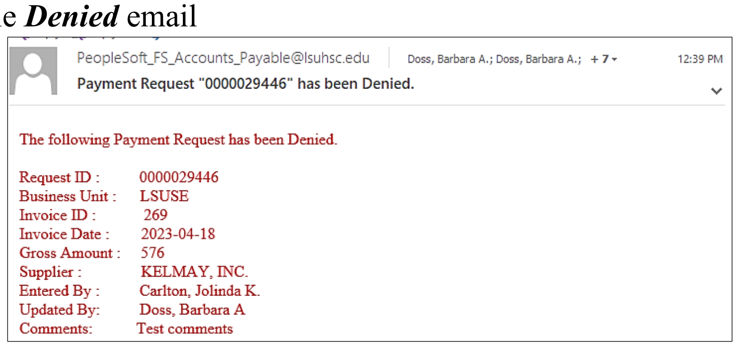
Click Submit

You will get a quick message: "*You have denied the request.*"

The Payment Request will no longer appear in your list of items to approve.

An email will be sent to the Requester and ADMIN notifying them that the Payment Request has been denied.

Sample ***Denied*** email



PeopleSoft_FS_Accounts_Payable@lsuhsc.edu | Doss, Barbara A.; Doss, Barbara A.; + 7 | 12:39 PM

Payment Request "0000029446" has been Denied.

The following Payment Request has been Denied.

Request ID : 0000029446
Business Unit : LSUSE
Invoice ID : 269
Invoice Date : 2023-04-18
Gross Amount : 576
Supplier : KELMAY, INC.
Entered By : Carlton, Jolinda K.
Updated By: Doss, Barbara A
Comments: Test comments

ADDING AD HOC APPROVERS

Ad Hoc approvers work like a chain – you are not adding a new step with two approvers in it, you are adding two new steps with one approver each. In general, the basic approval step process is:

Department Approver > Purchasing Approver
(Business Manager)

For instances where an additional approver or approvers are needed, either the Department Approver and/or the Purchasing Approver can add an Ad Hoc Approver.

CAUTION: *If for some reason, someone added 10 people in a row, the approval would go to* ***EACH*** *of the 10 people. EACH person will need to approve.*

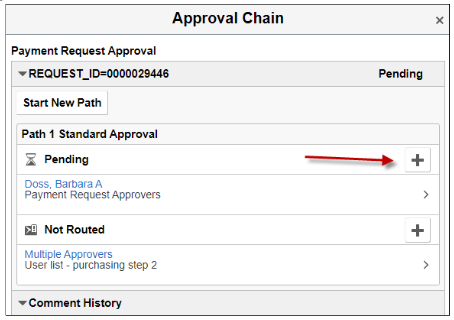
Department Approvers adding Ad Hoc Approvers

For this example, the Department Approver determines that an additional approver is needed. At this point, the Department Approver can add one or many additional approvers.

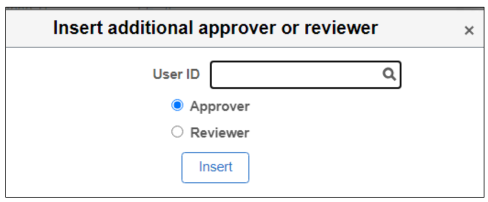
Samples of Ad Hoc Approver scenarios

1. The Department Approver adds the Department Chair as an Ad Hoc Approver. The new approval flow looks like this:
   Department Approver > Department Chair > Purchasing Approver
   The *Department Approver* does the Ad Hoc step. The *Department Chair* must approve the Payment Request before it goes to *Purchasing*. Once Purchasing approves, the Payment Request is ready for voucher processing.
2. The Department Approver adds the Department Chair and the Dean as Ad Hoc Approvers. The new approval flow looks like this:
   Department Approver > Department Chair > Dean > Purchasing Approver
   The *Department Approver* does the Ad Hoc step. The *Department Chair*, then the *Dean* must approve the Payment Request before it goes to *Purchasing*. Once Purchasing approves, the Payment Request is ready for voucher processing.
3. The Department Approver adds the Department Chair, the Dean and the Chancellor as Ad Hoc Approvers. The new approval flow looks like this:
   Department Approver > Department Chair > Dean > Chancellor > Purchasing Approver.
   The *Department Approver* does the Ad Hoc step. The *Department Chair*, then the *Dean*, then the *Chancellor* must all approve the Payment Request before it goes to *Purchasing*. Once Purchasing approves, the Payment Request is ready for voucher processing.

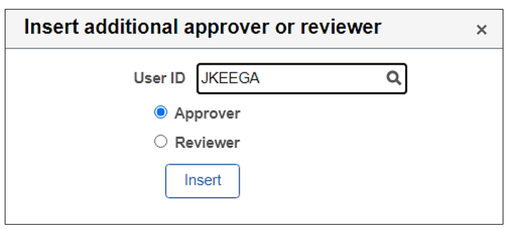
To add an *AD HOC Approver* click the Approval Chain on the ***Pending Approvals*** page for the desired Payment Request.



Click the + sign.



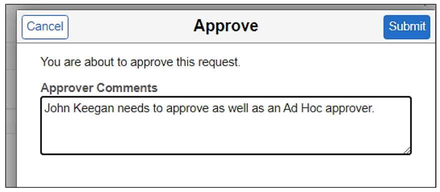
Enter the *User ID (**All CAPS**)*



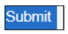
Click Insert

NOTE: *The Ad Hoc Approver must already have approval rights/security. If you assign a Payment Request to a user who does not have the appropriate security, that user will receive an email, but will not be able to approve. When they attempt to approve the Payment Request, they will receive a message similar to the one below.*

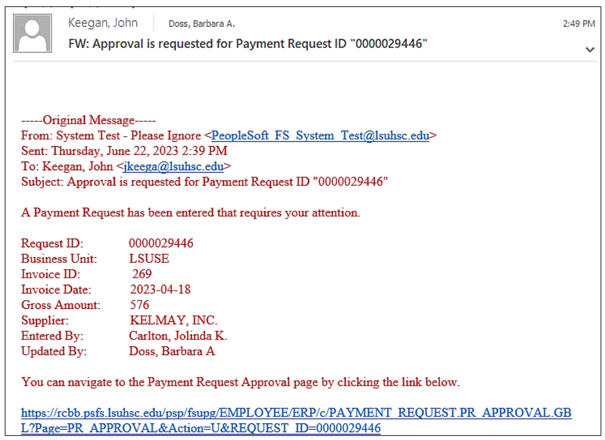
In this case, ADMIN will need to assist in either obtaining the correct security for this user or re-assigning the Payment Request to a different approver.



Add a comment.

Click 

The Ad-Hoc User will receive the below email.


Keegan, John | Doss, Barbara A.
2:49 PM
FW: Approval is requested for Payment Request ID "0000029446"

-----Original Message-----
From: System Test - Please Ignore <PeopleSoft_FS_System_Test@lsuhsc.edu>
Sent: Thursday, June 22, 2023 2:39 PM
To: Keegan, John <jkeega@lsuhsc.edu>
Subject: Approval is requested for Payment Request ID "0000029446"

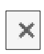
A Payment Request has been entered that requires your attention.

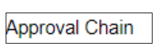
Request ID:	0000029446
Business Unit:	LSUSE
Invoice ID:	269
Invoice Date:	2023-04-18
Gross Amount:	576
Supplier:	KELMAY, INC.
Entered By:	Carlton, Jolinda K.
Updated By:	Doss, Barbara A

You can navigate to the Payment Request Approval page by clicking the link below.

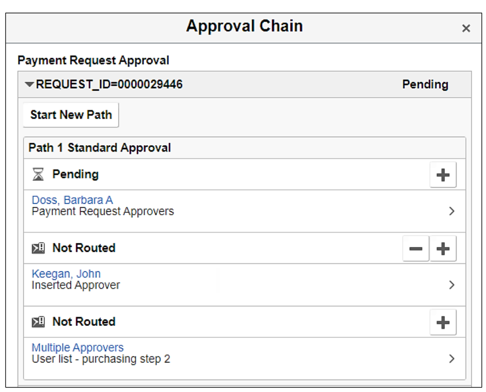
https://rcbb.psfs.lsuhsc.edu/psp/fsupg/EMPLOYEE/ERP/c/PAYMENT_REQUEST.PR_APPROVAL.GBL?Page=PR_APPROVAL&Action=U&REQUEST_ID=0000029446

Navigating back to Payment Request Approval page will show that the Payment Request is no longer in your list of Payment Requests to approve.

Click the  to close the page.

Click the 

link again to review the new approval routing.



The Ad Hoc Approver is inserted.

NOTE: *This <u>Ad-Hoc</u> step* ***does not*** *approve the Payment Request; rather it approves the new workflow to route to the Ad Hoc Approver.*

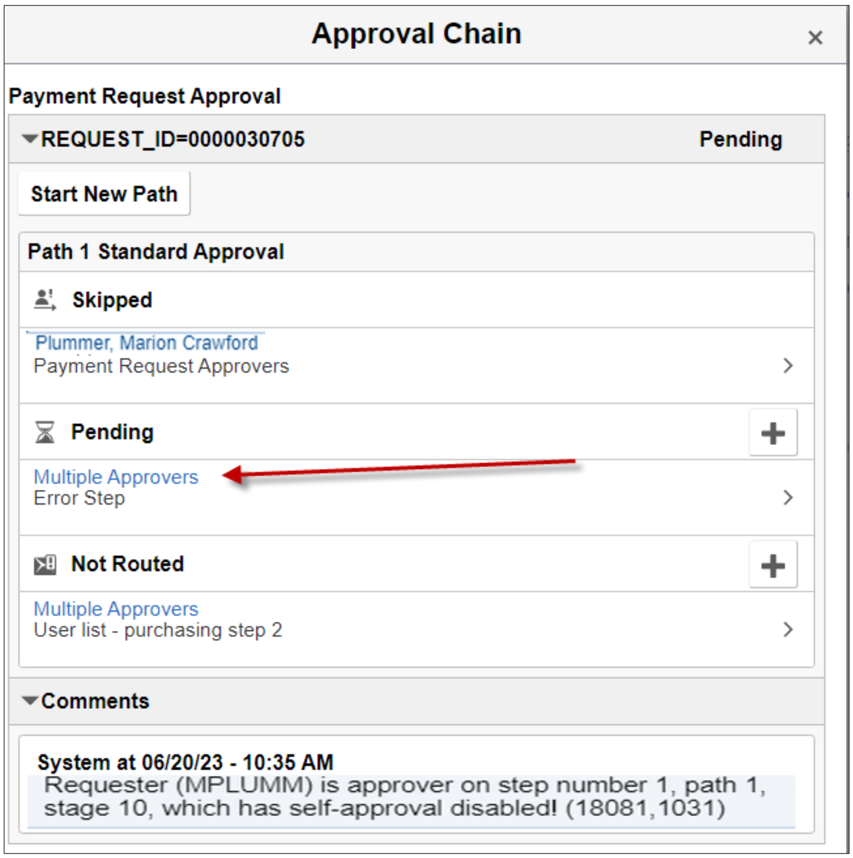
Purchasing Approvers adding Ad Hoc Approvers

If the *Purchasing Approver* adds an *Ad Hoc Approver*, *Purchasing* must first add the *Ad Hoc Approver* then approve the Payment Request. Since *Purchasing* has already approved, once the *Ad Hoc Approver* approves, the Payment Request is ready for voucher processing.

As the *Purchasing Approver*, to add the appropriate person as an *Ad Hoc Approver,* complete the same steps detailed above for the ***Department Approver adding Ad Hoc Approvers*** section.

Self Approvals

Payment Requests that are entered by an approver will have an approval status of "***Skipped***" and "***Pending***". Approvals for Payment Requests with this scenario will be "***Skipped***" as a Requester cannot self approve. If a second approver is set up for the department, they must approve. If no other approver exist for the department, the Payment Request will be routed to ADMIN. ADMIN will get the correct approver set up and re-submit the request for approval.



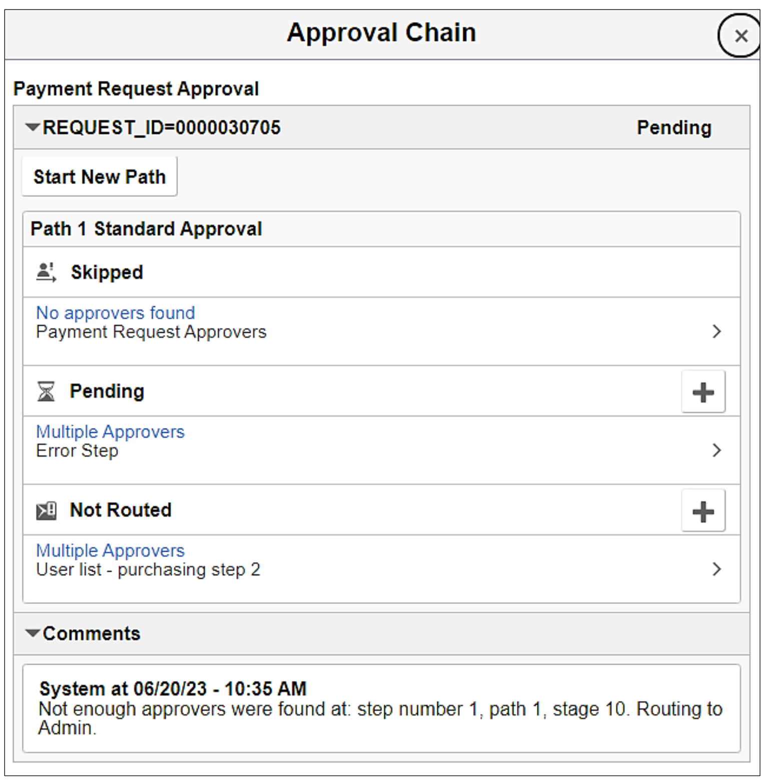
MISSING DEPARTMENT APPROVERS – (ADMIN APPROVERS ONLY)

There may be instances where a department is missing an approver. These Payment Requests are identified with an approval status of at *Path 1 – Standard Approve - Skipped*.

This indicates that when workflow was initiated, there was no *Department Approver* found for that department.

In this instance, workflow pushes the Payment Request to the next approval level, which is the **ADMIN** group to review.

ADMIN Action: Admin will need to identify the correct user as the *Department Approver*, gain approval to add the new approver to PeopleSoft (if applicable) and add the correct role to the users' security profile. Once the *Department Approver* is added, ADMIN will "*RESUBMIT*" the Payment Request into workflow. The new approver will approve.



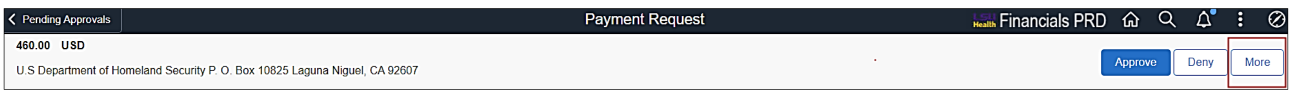
Pushback

There may be some instances where the Payment Request is not necessarily wrong, but requires additional information before it can be approved.

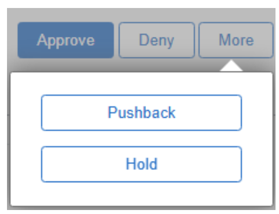
For this situation, the Pushback functionality can be used. This functionality is only available for ***Ad Hoc Approvers*** and ***Purchasing Approvers***.

NOTE: AFTER *clicking the Pushback link, be sure to* ***add a comment*** *detailing why the transaction is being pushed back.*

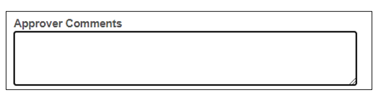
Whether you are the Ad-Hoc approver OR the Purchasing Approver, the process is the same.



Click the More link.



Select the Pushback option.

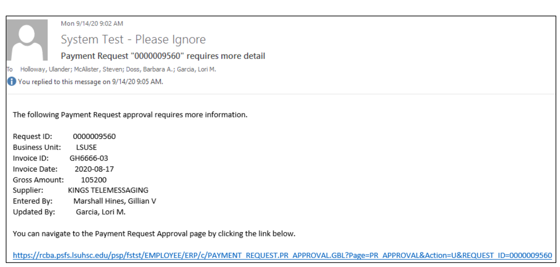


Enter necessary comments.

Click Submit

The previous "***Approved***" status reverts to "***Pending***." If the previous approver is an Ad Hoc Approver, he or she can either Deny with comments, Approve again or do a *Pushback* to the *Department Approver* with comments.

The *Department Approver* will receive the email below.



Mon 9/14/20 9:02 AM

System Test - Please Ignore

Payment Request "0000009560" requires more detail

To Holloway, Ulander; McAlister, Steven; Doss, Barbara A.; Garcia, Lori M.

You replied to this message on 9/14/20 9:05 AM.

The following Payment Request approval requires more information.

Request ID: 0000009560
Business Unit: LSUSE
Invoice ID: GH6666-03
Invoice Date: 2020-08-17
Gross Amount: 105200
Supplier: KINGS TELEMESSAGING
Entered By: Marshall Hines, Gillian V
Updated By: Garcia, Lori M.

You can navigate to the Payment Request Approval page by clicking the link below.

https://rcba.psfs.lsuhsc.edu/psp/fstst/EMPLOYEE/ERP/c/PAYMENT_REQUEST.PR_APPROVAL.GBL?Page=PR_APPROVAL&Action=U&REQUEST_ID=0000009560

APPROVAL TIMEOUTS

Notification Escalation Process

Notifications are dependent on ***NEM_VAF_ESCALATION*** job that runs each day at 5:10 am. This job detects when a record has become 'overdue', it will notify the Requesters at that time.

Timeout Schedule

The TIMEOUT notifications are set for ALL paths at 7, 14, 21 and 28 days intervals.

Payment Requests that are not approved, denied, or placed on hold will be subject to email reminders on a 7, 14, and 21-day schedule.

An email reminder, similar to the one shown below, will be sent to the assigned approver(s) based on the above timeline.

On the 28th day, an email is sent to the PR Administrators.

From: PeopleSoft_FS_Accounts_Payable@lsuhsc.edu <PeopleSoft_FS_Accounts_Payable@lsuhsc.edu>
Sent: Tuesday, September 27, 2022 5:10 AM
To: Powell, Bridget <bridget.powell@lsuhs.edu>; Chambers, Jacob <jacob.chambers@lsuhs.edu>; Rodriguez, Jeanie <jeanie.rodriguez@lsuhs.edu>; Simpson, Stacey <stacey.simpson@lsuhs.edu>; Samhan, Tisha <tisha.samhan@lsuhs.edu>
Subject: A payment request 0000025097 has been timed out by the escalation process.

A Payment Request is overdue and requires your attention.

Request ID: 0000025097
Business Unit: LSUSE
Invoice ID: 7-848-09934
Invoice Date: 2022-08-17
Gross Amount: 14.87
Supplier: FEDEX
Entered By: Lyle,Mary A.
Updated By: Marshall Hines, Gillian V

You can navigate to the Payment Request Approval page by clicking the link below.

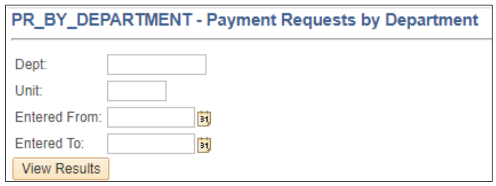
https://prd.psfs.lsuhsc.edu/psp/fsprd/EMPLOYEE/ERP/c/PAYMENT_REQUEST.PR_APPROVAL.GBL?Page=PR_APPROVAL&Action=U&REQUEST_ID=0000025097

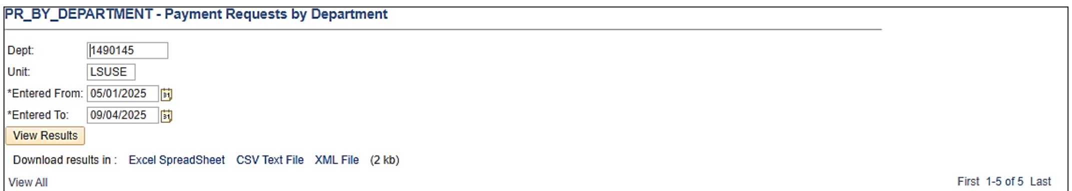
DO NOT REPLY
This is an automated system message.
For assistance please contact helpdesk@lsuhsc.edu

PAYMENT REQUEST QUERIES

PR_BY_DEPARTMENT – Payment Requests by Department

- List all Payment Requests for a given Department by date range regardless of status.





Row	Request ID	Unit	Line	Distribution Li	Merchandise Amt	Account	Dept	Product	Fund	Class	Program	Project	Entered	Supplier	Name	Request Status	Voucher
1	0000043719	LSUSE	1	1	320.000	565300	1490145		111	10105	40001		05/21/2025	0000057557	TRAINING SUPPLIER1	Pending	
2	0000043723	LSUSE	1	1	675.000	110000	1490145		111	10105	40001		06/26/2025	0000016925	MIXON PHOTOGRAPHY	Vouchered	00312947
3	0000043724	LSUSE	1	1	50.000	535000	1490145		111	10105	40006		08/01/2025	9999999999	LSUSE DEFAULT VENDOR (Payment Request)	Submitted	
4	0000043727	LSUSE	1	1	50.000	535400	1490145		111	10105	40001		08/11/2025	9999999999	LSUSE DEFAULT VENDOR (Payment Request)	Pending	
5	0000043732	LSUSE	1	1	100.000	110000	1490145		111	10105	40001		08/12/2025	0000017126	ULANDER HOLLOWAY	Vouchered	00312949

FAQ – FREQUENTLY ASKED QUESTIONS

Scanning

1. What if scanner does not have the correct driver?
   - Contact your local campus IT Support department.

2. When more than one document needs to be attached, can they be scanned as one document?
   - No.
     i. W-9s must be scanned and attached separately. All other documents may be combined into a single file.

3. Does the Payment Request have a template you can save?
   - No.

4. Are attachments required?
   - Yes.

Creating Payment Requests

1. Who can create the Payment Request?
   - Anyone with the correct security role and route control.

2. What if the PR Requester doesn't know which account code to use?
   - See the ***Policy – Types of Purchases Not Allowed*** section found at the beginning of this document.
   - If you require additional assistance, contact Travel & Direct Pay at shvmstraveldirectpay@lsuhs.edu.

3. Can I create a credit Payment Request?
   - No. The system is working as designed. Payment Requests are not designed to work like a Regular Invoice. Currently only payments with positive amounts can be created from the Payment Request Review Center. Credits can be entered as regular vouchers.

Reviewing Payment Requests

1. If DP needs more documentation in order to pay a Payment Request, how is the department notified?
   - DP will create a Payment Message within the Payment Request record, which will trigger an email to the PR Requester.

Approving Payment Requests

2. Why is workflow setup like that? Shouldn't DP be at the end?

- Workflow is set up to flow from PR Requester > Direct Pay PR Reviewer > Department Approver > Purchasing Approver.
  Since Payment Requests produce a fiduciary responsibility, the DP staff are not allowed to act on behalf of another person to approve payments of any kind. That responsibility falls to the Department Approvers and Purchasing Approvers.

3. Can the PR Requester approve his/her own Payment Request?
   - No.

4. Can the PR Requester also be an approver?
   - Yes, but not for Payment Requests they create.

5. If a Coordinator creates the Payment Request, is there a way for the Business Manager to electronically sign it showing they approve the Payment Request?
   - Yes, via Payment Request workflow, if the Business Manager has been assigned Approval authorization for that department.

6. Will the Payment Request be sent to Purchasing for their approval before it goes to Direct Pay?
   - No. The Payment Request must first go to the Direct Pay PR Reviewer for review, then to the Department Approver for approval. Once approved by the Department Approver, Purchasing will do a final approval.

7. What happens if a Payment Request is denied?
   - Payment Requests can only be denied by either the Department Approver or the Purchasing Approver. If an Approver denies the request, an email will be sent to the PR Requester and the PR Administrators for follow-up.

8. When a PR Requester clicks on the look-up icon for approvers, who will show in the drop-down approver list?
   - All authorized approvers for the Department ID will appear in the drop-down list and Purchasing Approvers.
   - If the individual submitting a Payment Request (PR Requester) also has authorization to approve Payment Requests, they will only see Payment Request's drop-down list as an Approver. This upholds institutional policy for "separation of duties", where Payment Request Requesters are not permitted to approve Payment Requests they create.

9. What if the listed approvers are incorrect?
   - To add/delete or change approvers for a department, the Department Head must send, via email, authorization to Travel & Direct Pay at shvmstraveldirectpay@lsuhs.edu.

Payment Request Vouchers

1. Once the PR Reviewer reviews a Payment Request, will a voucher number be created and sit there until the next check run?
   - No. Once the Payment Request is reviewed, workflow is triggered and the Payment Request is sent to the Department Approver. Once the Department Approver approves the Payment Request, workflow is triggered again and the Payment Request is sent to the Purchasing Approver. Once Purchasing approves the Payment Request, it becomes available for the Voucher Build process, which is scheduled to run daily, to create the actual voucher. At this point, the voucher is available for the payment processing steps.

2. A Payment Request shows vouchered in the PR Center; however, it is not viewable in the AP lookup screens and has not been paid.
   - When the Voucher Build process was run there was an error with either Supplier ID, location, etc. The error was never corrected via Voucher Build Error Detail page. The PR Reviewer must correct the problem. The voucher will then show correctly in the Payment Request Center.

Payment Request Payment Confirmation

1. What will be sent back to the department as supporting documentation?
   - A copy of the Payment Request Detail page summarizing the Payment Request information will be attached to the check.

END OF PROCESS