

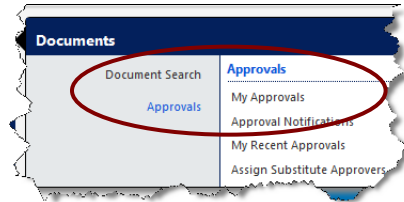
APPROVE A NON-PO PAYMENT REQUEST

Last updated March 27, 2018

Each Approver is assigned by their School/Center to an Approving ORG and a level in the 3-level Non-PO Payment Approval Hierarchy. **Level 1<\$5,000; Level 2<\$50,000; Level 3<\$250,000**

From the Penn Marketplace Homepage

- Under Supplier Requests, click on **Documents>Approvals>My Approvals**.



☞ *Approvers will receive an email indicating there is a Request(s) awaiting their approval.*

- The 'Shared Folder' lists Requests awaiting Action.
 - ☞ A 'Shared Folder' is one in which all Approvers assigned to an Approving Org have access to the Request(s) until an Approver assigns it to their own Folder, i.e. selects the 'Assign to Myself' Action.

Request Actions

Name of Preparer submitting Request

[Assign] moves Request to Approver folder

Assigned Approver is current location of Request. Not assigned = Request is in Shared Folder; Name = Assigned to that Approver

Requester	Assigned Approver	Request Date/Time	Folder Details	Action
PREPARER	Not Assigned	3/15/2018 7:36 PM	Folders: 6 Days in folder (Org Approval Level 1 - 4000)	Assign
PREPARER	Not Assigned	3/15/2018 8:45 PM	Folders: 6 Days in folder (Org Approval Level 1 - 4000)	Assign
PREPARER	Not Assigned	3/15/2018 10:02 AM	Folders: 6 Days in folder (Org Approval Level 1 - 4000)	Assign
PREPARER	Not Assigned	2/28/2018 10:00 AM	Folders: 6 Days in folder (Org Approval Level 1 - 4000)	Assign
PREPARER	Not Assigned	2/26/2018 9:40 AM	Folders: 6 Days in folder (Org Approval Level 1 - 4000)	Assign
PREPARER	Not Assigned	2/26/2018 9:20 AM	Folders: 6 Days in folder (Org Approval Level 1 - 4000)	Assign
PREPARER	Not Assigned	2/25/2018 5:54 PM	Folders: 24 Days in folder (Org Approval Level 1 - 4000)	Assign
APPROVER	ARLENE M. BROOME KAUFMAN	2/25/2018 5:40 PM	Folders: 24 Days in folder (Org Approval Level 1 - 4000)	Assign
PREPARER	Not Assigned	3/15/2018 4:11 PM	Folders: 28 Days in folder (Org Approval Level 1 - 4000)	Assign

Reviewing a Request – Level 1 Approver

- The Level 1 Approver reviews the five (5) sections of the Request before taking a Request Action:
 - Supplier
 - Questions
 - Codes
 - Additional Information
 - Review and Submit
- Once all sections are reviewed, click on **[Submit]**.

Guidelines for Reviewing

- Validate Invoice Details match supporting documentation.
- Review the 'Note to Approver'.
 - ☞ *The business purpose and program supporting this activity and any additional approval needed, i.e. Dean, Chair, PI, Program Director, etc.*
- Ensure the 'Chart of Accounts' (COA), i.e. 'Codes' is accurate
 - ☞ *The Request must be in the My Approvals Folder to Edit 'Codes' or return the Request to the Preparer.*

Approver Request Actions

Action	Approver Org Level 1 Folder (Shared Folder)	My Form Request Approvals Folder	Invoice (If Assigned to Me)
*Action Requires a Note to Preparer			
Add to Favorites	YES	N/A	YES
Approve/Complete	YES	YES	YES
Assign to Myself	YES	N/A	N/A
Forward to...*	N/A	YES	YES
Put Request on Hold	N/A	Not used at Penn	Not used at Penn
Reject*	N/A	N/A	YES
Return to Preparer*	N/A	YES	YES
Return to Shared Folder	N/A	YES	YES

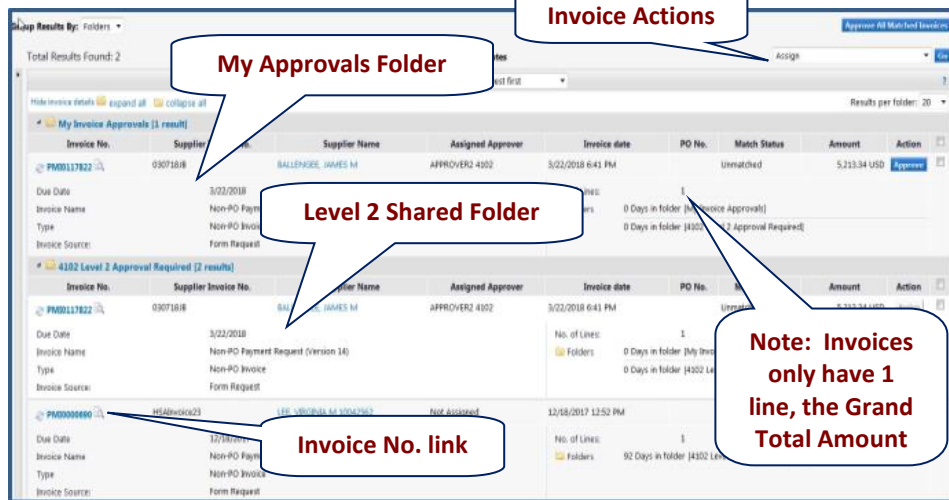
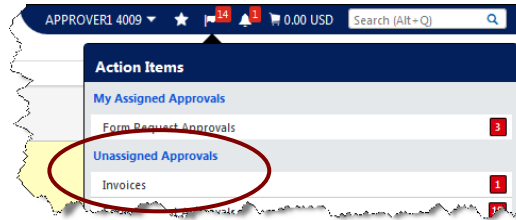
More Information for Approver

- Requests can be reviewed and acted upon from your Approving Org Folder or the My Approvals Folder.
- Assigning a Request to the My Approvals Folder 'checks' the Request out and prevents another Approver from working on it.

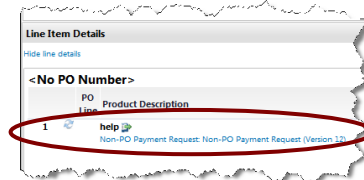
Reviewing an Invoice – Level 2 or 3 Approver or Individual Invoice was ‘Forwarded To’ for Supplemental Approval

From the Penn Marketplace Homepage

- Under Action Item, click on **My Unassigned Approvals>Invoices**.
 - Approvers will receive an email indicating there is a Request(s) awaiting their approval.



- Click on the **Invoice No. link**.
- An Invoice has many tabs available. The screen opens to the **Buyer Invoice>Summary Tab**.
- An ‘edit’ button is available in every section.
 - Only a few sections on an Invoice can be edited. **DO NOT EDIT Invoice and Payment Overviews, or the Address!**
- Approving Org, COA and Note to Approver can be ‘edited’.
- Scroll down and click on link to open initial Request to review supporting documentation.
- Able to ‘edit’ Grand Total of Requested Payment. Must also update COA to equal new amount and add a Note to History.



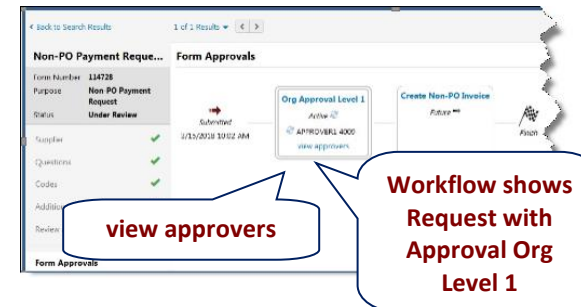
- Comments, Supplier Messages and History tabs are used to document notes as needed during the review of an Invoice.
 - Comments are internal to Penn users and can be emailed.
 - Supplier Messages are sent by the Supplier to Penn.
 - History notes are visible to both the Supplier and Penn users.
- After completing the Invoice review, take an Invoice Action to approve and authorize payment.

Approver Request Actions

Action	Approver Org Level 2/3 Folder (Shared Folder)	My Invoices Approvals Folder	Invoice (If Assigned to Me)
*Action Requires a Note to Preparer			
Add Comment*	N/A	N/A	YES
Assign to Myself	YES	N/A	N/A
Approve/complete step	YES	YES	YES
Approve/complete & show next	YES	N/A	YES
Add Notes to History*	YES	YES	YES
Forward to...*	YES	YES	YES
Reject/Cancel*	N/A	N/A	YES
Return to Shared Folder	YES	YES	YES

Forms Approvals – Level 1 Approver View the Workflow

- Form Approvals show where the Request is in the workflow process.
- Form Approvals shows past and future steps.
- ‘view approvers’ shows Approvers assigned to that Org Approver Level and their contact information.



Note: For **Level 2 or 3**, the Invoice workflow process is found in the Buyer Invoice>Approval tab

Additional Questions? Please Contact Us
Phone: BEN Helps (215-746-4357)
E-mail: DoFAPSupp@pobox.upenn.edu