

Morehead State University

Self-Service Procurement – Payment Request



Step 1: Log into your My.MoreheadState.edu account and select the “Self-Service Link”



Step 2: Select the “Financial Management” tile



Financial Management

Here you can view the financial health of your cost centers and your projects.

Step 3: Select the “Procurement” tile



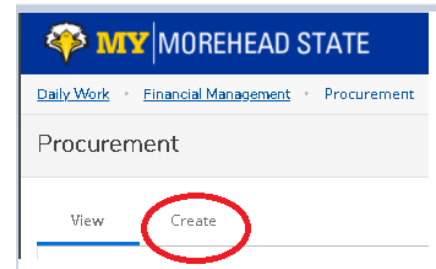
Procurement


Here you can create and maintain your procurement documents.


Previously created Payment Requests, Purchase Orders and Requisitions will be displayed (to modify existing documents – see step 8 below)

Step 4: Select “Create” for a new document

- **Document Type:** Payment Request
- **Request Date:** will auto populate with current date
- **Confirmation email address:** will auto populate with initiator’s email, additional email addresses can be added for status notifications
- **Next Approver:** leave blank, the system will auto populate
- **Internal Comment:** add notation if the individual receiving payment is an MSU employee
- **Reimbursement Information:** indicate if reimbursement is for initiator or enter Vendor ID: enter the vendor’s name and select correct vendor information from search menu. If the vendor is not available, please contact Procurement Services to have the vendor added to the vendor file.
- **Address:** will auto populate. If the address listed is not available, enter the correct address into the Internal Comment section and the payment request will be updated.
- **Invoice Number:** enter if known (optional)



- **Invoice Date:** enter date of invoice (optional)
- **AP Type:** select from drop down menu
 - VE – Vendors Employee Reimbursement – payments to employees
 - VP – Vendor Payables – payment to non-employee vendors
- **Tax Code Fields 1,2 &3** – leave blank
- **Items:** select “Add Item” 
 - **Description:** enter item description
 - **Quantity:** enter quantity of items to purchase
 - **Price:** enter price per unit
 - **Extended price:** will auto calculate
 - **GL account:** begin entering account number and select correct GL from auto populated account numbers
 - **Amount:** enter amount to charge GL account (extended price can be submitted on multiple GL accounts)

Step 5: Select “Add item”  to add additional line items

OR

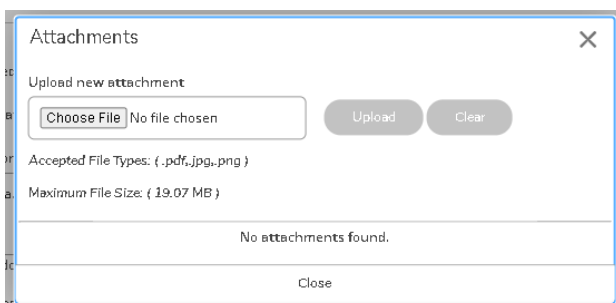
“Save and Attach” 

Supporting documentation must be attached (invoice, receipt, Travel Expense Voucher, etc.).



All Travel Expense Voucher documentation must contain a copy of an approved travel request or email approving the travel submitted with the payment request. In addition, international travel must include original authorization from the Office of the President approving the international travel

Step 6: To upload attachments:



Select “Choose File”

“Open” file from desktop

Select “Upload”

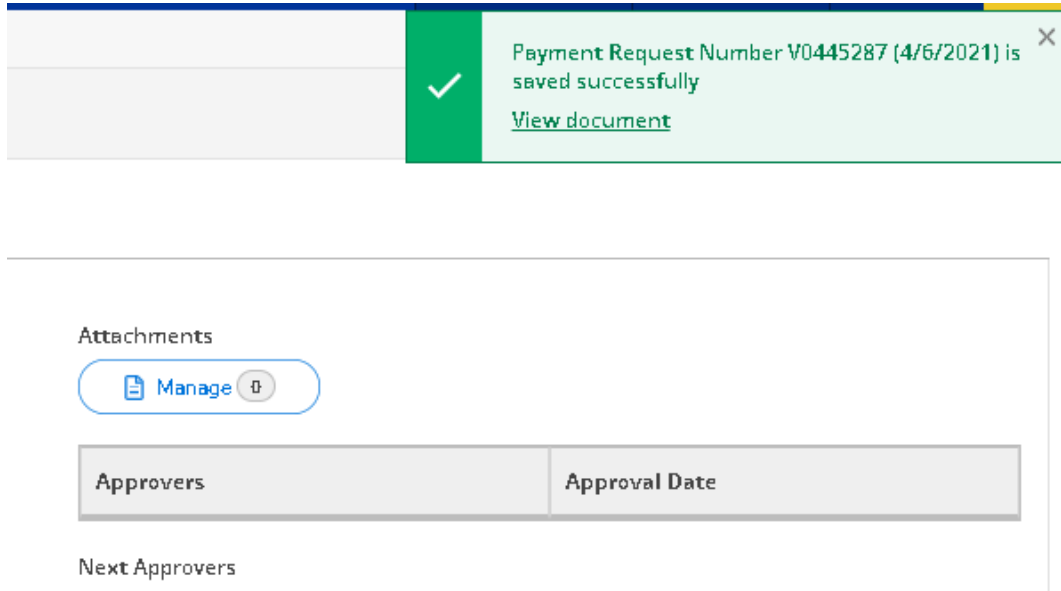
**Multiple documents may be attached

Step 7: Upon submittal of attachments:

A payment request number is assigned

The ability to manage attachments is available

Email notifications generate to initiator and approvers

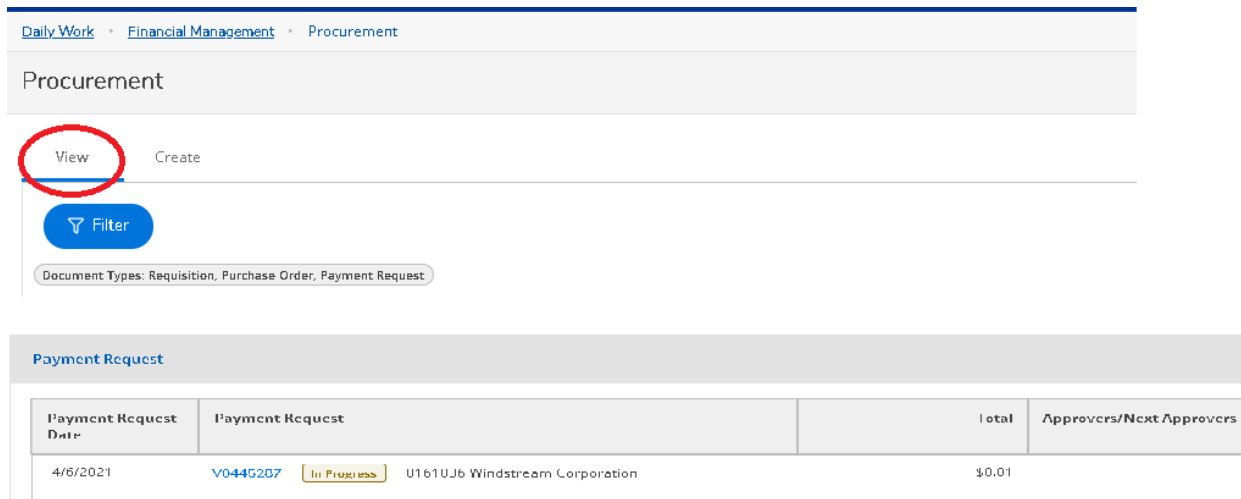


The screenshot shows a confirmation message at the top: "Payment Request Number V0445287 (4/6/2021) is saved successfully" with a green checkmark icon and a "View document" link. Below this, there is a "Manage" button with a document icon and a dropdown arrow. Underneath is a table header with "Approvers" and "Approval Date" columns. At the bottom, there is a "Next Approvers" label.

To modify payment request after submittal:

Step 8: Select the "View" tab

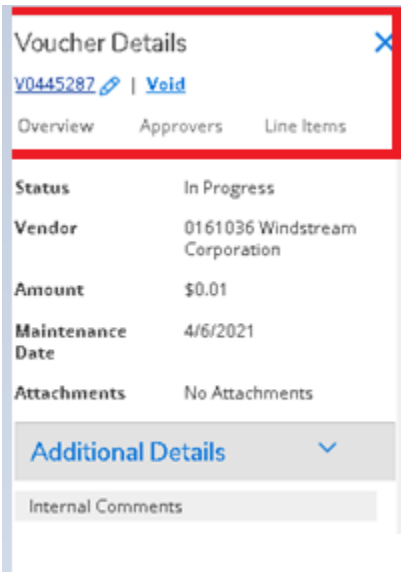
Step 9: Select the appropriate Payment Request to modify



The screenshot shows the "Procurement" section of a system. The "View" tab is circled in red. Below the tabs is a "Filter" button and a breadcrumb trail: "Document Types: Requisition, Purchase Order, Payment Request". A table titled "Payment Request" is displayed below, with columns for "Payment Request Date", "Payment Request", "Total", and "Approvers/Next Approvers".

Payment Request Date	Payment Request	Total	Approvers/Next Approvers
4/6/2021	V0445207 In Progress U161UJ6 Windstream Corporation	\$0.01	

A Voucher Details screen appears offering edit, void and tabs for overview of document information, approvers and line item review.

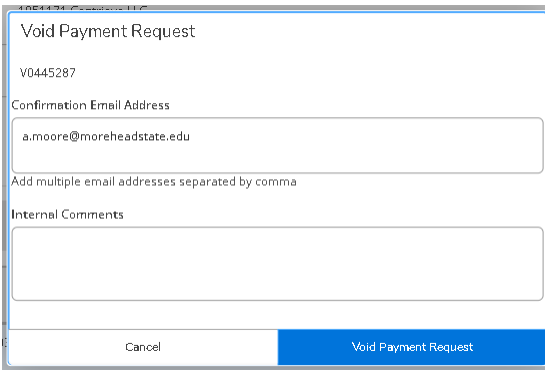


Status	In Progress
Vendor	0161036 Windstream Corporation
Amount	\$0.01
Maintenance Date	4/6/2021
Attachments	No Attachments

 Selecting the pencil icon  indicates editing ability.

NOTE – Editing Payment Requests after submittal will regenerate status email notifications to all parties.

If voiding a payment request, a pop up box will appear allowing the addition of internal comments.



Void Payment Request

V0445287

Confirmation Email Address

a.moore@moreheadstate.edu

Add multiple email addresses separated by comma

Internal Comments

Cancel Void Payment Request