Overview of myUF Payment Solutions

This guide is designed for reviews and approvers in myUF Payment Solutions. To complete the process described below, you must have the UF_SY_BUSUNIT_UFLOR role and either the UF_AP_Reviewer or UF_AP_Approver security role in myUFL. For a complete coverage of content and skills related to myUF Payment Solutions, please see the appropriate online course for your role in the system: PST967 myUF Payments for Reviewers or PST970 myUF Payments for Approvers.

To access myUF Payment Solutions, use the following steps:

- Visit http://my.ufl.edu
- Click the Access myUFL button
- Enter your GatorLink username and password
- Click the Login button
- Click Main Menu > My Self Service > myUF Payment Solutions

In this guide, you will receive a quick tour of myUF Payment Solutions:

- Main Menu
- Search
- Inbox
- Check Request
- Out of Office

1. The main menu in myUF Payment Solutions is at the top on the right and includes the following:

   - Check Request
   - Search
   - Inbox
   - Out of Office

2. The **Inbox** page contains various folders:

   - New Documents
   - Pended
   - CC’d
   - Unassigned

3. The **Search** page allows you to find invoices you have submitted as approved and check their workflow status. You may use filters and save views for future reports.
4. Below are the results for a search for a specific vendor number.

5. To create a Check Request for payments with no invoice or a transfer of Foundation Funds, click Check Request then click OK to continue.

6. To create an invoice for an unencumbered payment that does not have an invoice, you need to enter the following within the check request:
   - Amount
   - Vendor
   - Invoice Number (departments should have relevant sequential invoice numbers)
   - ChartField Allocations
   - Invoice date

7. You may also add Special Instructions:
   - Request Same Day Payment by AP
   - Send Check with Attached Form
   - Call for Pickup
   - Mail to Alternate Address

   For example, you could enter a payment for an Artist's Fee at University of Florida Performing Arts, wireless device allowances and/or Publix pink receipts.

   Use this form to transfer funds from the Foundation to your department. The box for UF Foundation Request for Transfer of Funds must be checked.

   - Invoices must be routed to the FA for the [F source].

8. Use the Out of Office page to add a substitute. This will move all current invoices and new invoices (that arrive between those dates) to that user.
Here is an example of a completed Out of Office row.

<table>
<thead>
<tr>
<th>From User</th>
<th>To User</th>
<th>Setup By</th>
<th>From Date</th>
<th>To Date</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pearson, Dianna</td>
<td>Brook Elizabeth</td>
<td>Pearson, Dianna</td>
<td>9/1/2016 12:00:00 AM</td>
<td>9/15/2016 12:00:00 AM</td>
<td></td>
</tr>
</tbody>
</table>

- Invoices will not be routed back to you automatically after the Out-of-Office period has ended. The voucher(s) will have to be manually routed back to you.

9. At any time, click the Help link at the top of the main menu to view page-related help documentation.

If you need help with...

- Technical issues, contact the UF Help Desk:
  o 392-HELP(4357)
  o helpdesk@ufl.edu

- Procedures, Policies and Directives, contact University Disbursements:
  o 392-1241
  o Disbursements@ufl.edu