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:
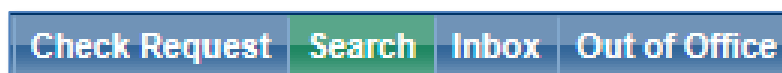
- Check Request
- Search
- Inbox
- Out of Office

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.

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4. Below are the results for a search for a specific vendor number.

		COR360 Voucher Number	Amount	Check Date	Check Description	Check Number	Paid Status	Payment Check Number	Payment Status	Vendor Name	Vendor Number	
		10609995	79.00		D502212		N			Aramark Corporation	0000008033	☐
		10609991	209.93		D502174		N			Aramark Corporation	0000008033	☐
		10609988	99.42		D501963		N			Aramark Corporation	0000008033	☐
		10609605	206.00		D502217		N			Aramark Corporation	0000008033	☐
		10609230	53.91		D502109		N			Aramark Corporation	0000008033	☐
		10609226	1,340.70		D502192		N			Aramark Corporation	0000008033	☐
		10608850	25.47				N			Aramark Corporation	0000008033	☐
		10608849	53.90				N			Aramark Corporation	0000008033	☐
		10608838	129.42				N			Aramark Corporation	0000008033	☐
		10608837	77.64				N			Aramark Corporation	0000008033	☐
		10608835	139.00				N			Aramark Corporation	0000008033	☐
		10608834	297.43				N			Aramark Corporation	0000008033	☐
		10608830	111.96				N			Aramark Corporation	0000008033	☐
		10608829	297.43				N			Aramark Corporation	0000008033	☐
		10608827	357.59				N			Aramark Corporation	0000008033	☐

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.

Check Request | Search | Inbox | Out of Office

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.

Check Request | Search | Inbox | **Out of Office**

Here is an example of a completed Out of Office row.

From User	To User	Setup By	From Date	To Date	
Pearson, Dianna	Brook Elizabeth	Pearson, Dianna	9/1/2016 12:00:00 AM	9/15/2016 12:00:00 AM	Edit

- 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