CALIFORNIA STATE UNIVERSITY
FULLERTON
Philanthropic Foundation

CSFPF ServiceNow Check Request FAQs

1. How to access the CSFPF ServiceNow Check Request?

   ○ Beginning Monday, July 10, 2023, the new CSFPF ServiceNow Check Request form will be active.

   ○ Link to Check Request and other documentation will be available on the check request section of the Foundation website (CSFPF)

2. How to complete the Check Request?

   ○ The format of the online check request workflow is the same as the previous PDF form.

   ○ Instructions available on the Foundation website (CSFPF)

3. What if my authorized approver is missing from dropdown list?

   ○ If an approver is missing and they are authorized to sign, please email the Foundation at CSFPFAP@fullerton.edu

4. What if a check request is for an item not found on the qualifying item list?

   ○ Submit a Foundation requisition request for items not covered by a check request.

   ○ If services were already rendered, then submit a check request and select no to the compliance review question "is this a qualifying item for a check request" and upload an approved UPAR form.

   ○ For questions, email CSFPFAP@fullerton.edu

5. How does a manager approve or reject a check request?

   ○ Upon submission of the check request, an email will be sent to the selected approver(s) with a link to approv or reject.

   ○ The system will automatically send reminder emails if the request has not been approved within 72 hours.

6. How does a requester review the status?

   o All check requests will be assigned a unique RITM number.

   o The requester will have two ways to view the workflow status:

     ▪ They will receive an email with a link to ServiceNow for the specific RITM listed in the email when the check request has been submitted.

     ▪ Open the user interface link on the Foundation website (CSFPF) to view the workflow status for all submitted check requests.

7. How does an authorized approver view a request and attached documents?

   o The approver will receive an email with a link to the request

   o The email will list the supporting documents or the approver can click the request link to view them.

8. How does a Requester resubmit a workflow check request after it is rejected?

   o Requesters will receive an email specifying which check request has been rejected, reason for the rejection and by whom. A rejected request will require a new form to be submitted.

9. How does a requester update a check request returned by the Foundation?

   o Requesters will receive an email indicating the reason why a request has been returned and include a link to make the corrections.

10. Will in-progress check request forms still be accepted?

   o Yes. In-progress check request forms with wet or electronic signatures will be accepted through August 31, 2023

   o The approved PDF form must be submitted using the CSFPF ServiceNow check request

     • Complete the required information on the check request and select the "Override Department Approvals" box before submission.

11. Need additional information?

   o For additional information, please refer to the check request section on the Foundation website or email CSFPFAP@fullerton.edu