

Philanthropic Foundation

CSFPF ServiceNow Requisition & PO Payment Requests FAQs

- 1. How to access the CSFPF ServiceNow Requisition and PO Payment Requests?
 - Beginning Monday, November 27, the new CSFPF ServiceNow requisition and PO payment requests will be active.
 - Link to requests and other documentation will be available on the requisition request section of the Foundation website (<u>CSFPF</u>)
- 2. How to complete the requests?
 - The format of the ServiceNow requisition request workflow is the same as the previous PDF form.
 - Instructions available on the Foundation website (<u>CSFPF</u>) for both of the new ServiceNow workflows
- 3. Who should be selected as the authorized approver(s)?
 - The primary account signer should be selected and if the amount is greater than \$3,000 then one of the other approved signers should also be selected.
 - Signers for a specific Foundation account can be found on the Account Info report on the Foundation website (<u>CSFPF Acct Info</u>)
- 4. 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 <u>CSFPFAP@fullerton.edu</u>
- 5. How does a manager approve or reject a request?
 - Upon submission of the requisition request or PO payment request, an email will be sent to the selected approver(s) with a link to approve 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?
 - All requests will be assigned a unique RITM number.
 - \circ 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 request was submitted.
 - Open the user interface link on the Foundation website (<u>CSFPF</u>) to view the workflow status for all submitted requests.
- 7. How does an authorized approver view a request and attached documents?
 - The approver will receive an email with a link to the request
 - 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 request after it was rejected?
 - Requesters will receive an email specifying which request was rejected, reason for the rejection and by whom.
 - Rejected requests will require a new form to be submitted.
- 9. How does a requester update a request returned by the Foundation?
 - 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 requisition request forms still be accepted?
 - Yes. In-progress requisition request forms with wet or electronic signatures will be accepted through December 15, 2023
 - The approved PDF form must be submitted using the CSFPF ServiceNow requisition request
 - Complete the required information on the requisition request and select the "Override Department Approvals" box before submission.
- 11. Will the Foundation continue to accept invoices emailed to CSFPFAP?
 - Invoices submitted to the CSFPFAP email after November 26 will be returned and require the requester to use the new PO payment request.

- 12. How do I know if the request has been approved?
 - If the request is approved, the requester and approver(s) will receive an email indicating approval
 - In the case of a requisition request, the email will include the authorized purchase order (PO) number.
- 13. How to submit a change order against an approved purchase order?
 - On the requisition request under type, select change and enter a valid PO number in the dialog box.
 - Vendor information will automatically populate on the request
 - All PO numbers begin with "P"
- 14. What if I need a contract signed by the Foundation?
 - o Submit unsigned contract and indicate in the special instructions that it needs to be signed
 - Foundation will get contract signed by CFO and email a copy to the requester
 - Signed contract will be attached to the request
- 15. What if I need a deposit paid to the vendor?
 - Check the deposit required box and enter the amount in the dialog box.
 - If the field is blank and a deposit is required, then an invoice will need to be submitted after the PO has been issued.
- 16. What if the vendor is new?
 - If the vendor is new, they will need to be registered with PaymentWorks. When the Foundation receives the request, they will email the vendor an invitation to register.
- 17. Need additional information?
 - For additional information, please refer to the requisition request section on the Foundation website or email <u>CSFPFAP@fullerton.edu</u>