

## **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 ([CSFPF](#) )
  
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 ([CSFPF](#) ) 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 ( [CSFPF Acct Info](#) )
  
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 [CSFPFAP@fullerton.edu](mailto:CSFPFAP@fullerton.edu)
  
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.
  - 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 ([CSFPF](#)) 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?

- 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 [CSFPFAP@fullerton.edu](mailto:CSFPFAP@fullerton.edu)