

New Electronic Payment Voucher

Dynamic Form (DF)

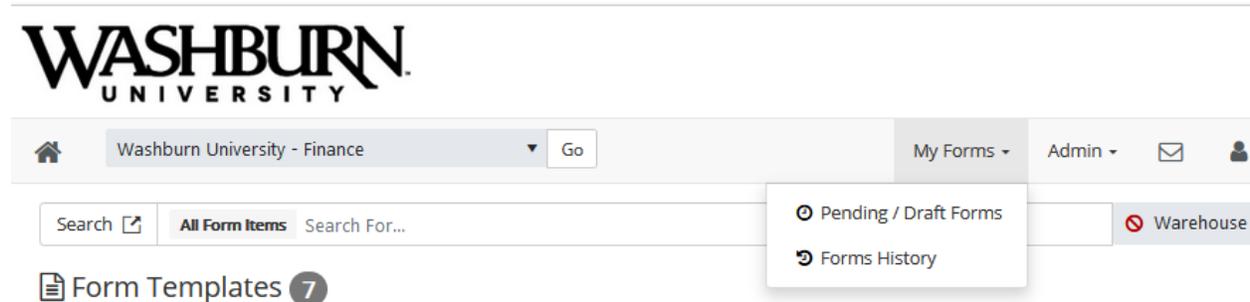
Approver Instructions

A new electronic Payment Voucher (PV) has been created in Dynamic Forms (DF) that can be used instead of the Excel Payment Voucher. This new electronic form does not require a digital signature on a PDF, nor will anyone need to manually send the PV to Accounts Payable (AP) for processing. Secure signatures are added by simply signing in with your Washburn University Single Sign On (SSO).

When someone prepares a PV using DF, they enter the email of the individual(s) who is required to approve the payment. That individual receives an email from “donotreply@washburn.edu”. The subject line of that email includes the name of the vendor being paid as well as the amount. The body of the email contains the following link, “Click here to complete your section of the form.” Click on that link to be directed to Dynamic Form and your SSO.

You can also access forms by clicking the Dynamic Forms link on the Employee tab of MyWashburn and logging in with your Washburn SSO Credentials.

To see previous forms, select the drop-down arrow next to My Forms in the top-right.



Pending / Draft Forms: This page allows you to view forms you currently need to sign, forms you’ve saved as a draft, or forms you’ve completed that still require another signature(s).

Forms History: This page shows forms that you have previously completed and do not require additional signatures. You are able to go back and view or print forms from this page.

*Both of these areas feature a search box that may help you find a specific form.

The new DF PV looks very similar to the one that has been used in the past. Under the “Accounting Information” section there will be one or more attachments with the invoice/documentation of the payment. Click on the blue hyperlink to open the payment details.

| Accounting Information (Include all applicable fields) | | | | | | | |
|--|--------|--------|-------|----------|----------|-----------|--------------------------|
| Campus: WU | | | | | | | |
| Fund | Orgn | Acct | Prog | Activity | Location | Amount | Add Funding Line |
| 100000 | 460000 | 700780 | 17004 | | CG | \$ 275.00 | <input type="checkbox"/> |
| TOTAL | | | | | | \$ 275.00 | |

Attachments

FileUpload1 [Cambridge.pdf](#)

FileUpload2

FileUpload3

As the approver, you must review the payment information to ensure accuracy, including the attachments and the FOAPAL(s) provided on the PV. Approving a payment indicates you’ve accessed the invoice and reviewed the FOAPAL for accuracy.

Upon completion of your review, you have three choices:

- Approve the payment
- Return the PV for revisions/questions
- Deny the payment

Important Note: If no action is taken within five days of receiving the email, you will receive another email every five days until you select one of the three options above to move the payment through the process.

Instructions to approve the payment

If the PV includes complete and accurate information, and you approve the payment, select approve, add any comments, sign, submit.

Approvals

Dept/Area Head/Sponsor/Student Org1 Decision:

Comments:

I certify I have reviewed the attached documentation as well as the accounting information provided on this Payment Voucher.

*

Department/Area Head/Sponsor/Student _____ Date _____
Org1 Signature _____

1. Click the down arrow, select “approve” from the drop-down list

Dept/Area Head/Sponsor/Student Org1 Decision:

2. Add comments, if needed

Comments:

3. Click the box certifying you reviewed the FOAPAL and attached documentation.

I certify I have reviewed the attached documentation as well as the accounting information provided on this Payment Voucher.

4. Select the (click to sign) box

5. Type your first and last name and click the “Sign Electronically” button. This does not submit the document. You must proceed to step 6 to ensure the PV is submitted.

Sign electronically

Please read the [Disclosure / Consent](#) before you sign your form electronically.

Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the [Disclosure/Consent](#) and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.

To continue with the electronic signature process, please enter your name and click the “Sign Electronically” button to save your information and submit your electronic signature.

If you would like to opt out of electronic signature, please click the “Opt out and print” link below to save your information and print a local copy for your signature.

[Opt out and print](#)

6. Scroll to the bottom of the form and click the “Submit Form” button

The form is automatically forwarded to the next individual in the process.

Instructions to deny the payment

Important Note: If the PV is denied instead of approved, it is no longer available for updates, a new PV must be created. The only time a PV should be denied is if the payment request is in error and will not be paid. If you have questions about the payment, or if the PV needs corrections, please refer to “Instructions to return the PV for revisions/questions” on the next page.

Approvals

Dept/Area Head/Sponsor/Student Org1 Decision: *

Comments:

I certify I have reviewed the attached documentation as well as the accounting information provided on this Payment Voucher.

Department/Area Head/Sponsor/Student Org1 Signature Date

1. Click the down arrow, select “deny” from the drop-down list

Dept/Area Head/Sponsor/Student Org1 Decision: *

2. Add comments, if needed

Comments:

3. Click the box certifying you reviewed the FOAPAL and attached documentation.

I certify I have reviewed the attached documentation as well as the accounting information provided on this Payment Voucher.

4. Select the (click to sign) box

(click to sign)

5. Type your first and last name and click the “Sign Electronically” button. This does not submit the document. You must proceed to step 6 to ensure the PV is submitted.

Sign electronically

Please read the [Disclosure / Consent](#) before you sign your form electronically.

Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.

To continue with the electronic signature process, please enter your name and click the “Sign Electronically” button to save your information and submit your electronic signature.

Name

Parsons

Sign Electronically

If you would like to opt out of electronic signature, please click the “Get out and print” link below to save your information and print a local copy for your signature.

[Get out and print](#)

6. Scroll to the bottom of the form and click the “Submit Form” button

Submit Form

The individual who prepared the PV receives an email that the payment was denied and includes comments that were added at the time it was denied.

Instructions to return the PV for revisions/questions

If you have questions or need additional information about a PV, you can send an email to the individual who initially prepared the PV, or anyone who has approved the payment prior to you. Only the individual who prepared the form has the ability to make changes to the form.

An email is sent to anyone who had previously approved the PV letting them know it has been returned for revisions. At this time the email does not contain specific information about which PV was returned. That is an enhancement DF is currently working on adding.

The email you send is not saved as part of the PV. If you would like the question(s)/request(s) saved as part of the document, there is a step you must complete prior to sending the email.

Important Note: if you choose to only send the email, and not to save the question(s)/request(s) on the PV, the individual receiving your email will see your comments in the email, however other individuals, such as other approvers, will not know why the PV is being re-routed for approvals.

How to save your notes on the PV for future reference

Enter your question(s)/request(s) in the comment section. Do not choose approve or deny and do not sign the document.

Approvals

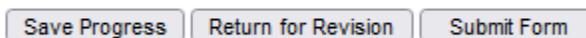
Dept/Area Head/Sponsor/Student Org1 Decision: *

Comments:

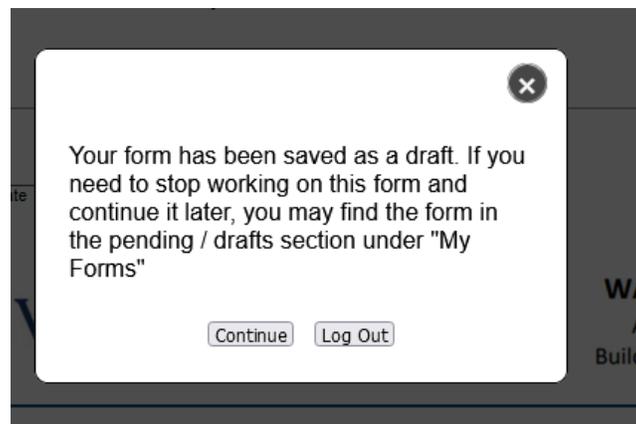
Department/Area Head/Sponsor/Student Org1 Signature

Date

Scroll to the bottom of the PV and select "Save Progress".

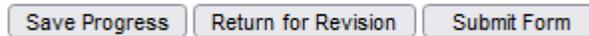


You will see a message confirming the form has been saved. Select "Continue" to return to the PV.

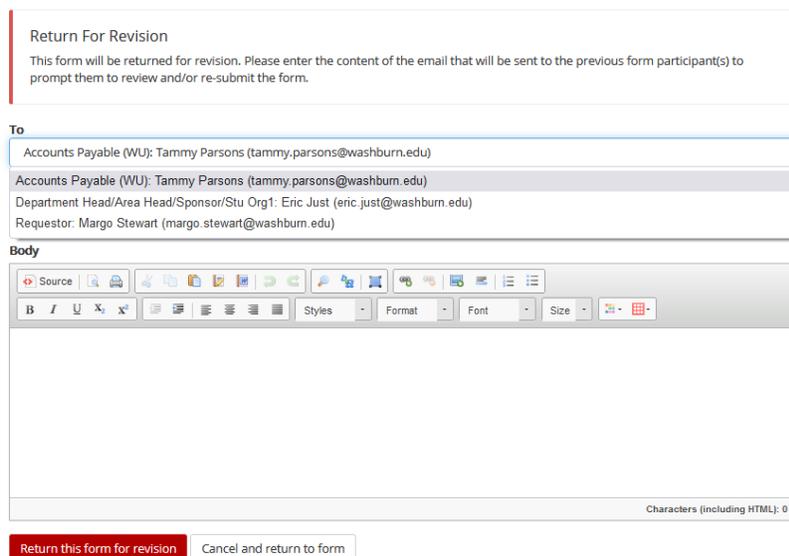


How to send the email with question(s)/request(s)

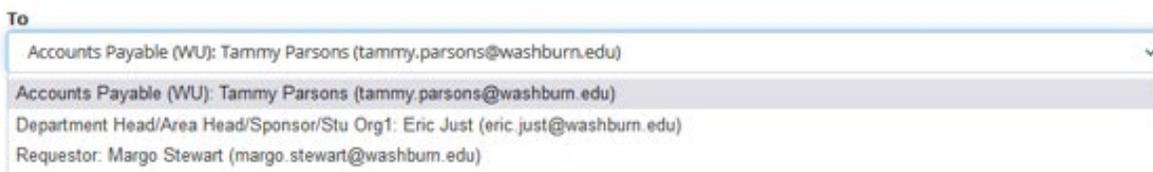
Scroll to the bottom of the form and select “Return for Revision”.



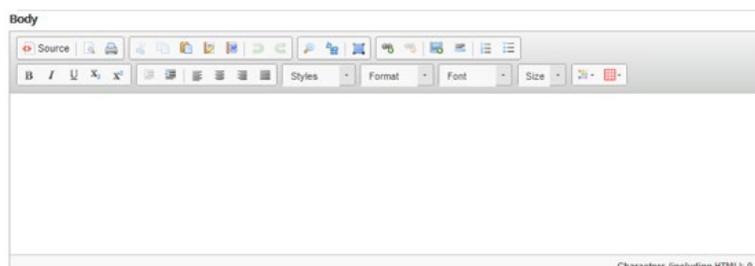
The email template is now available.

The screenshot shows a form titled "Return For Revision". Below the title is a paragraph: "This form will be returned for revision. Please enter the content of the email that will be sent to the previous form participant(s) to prompt them to review and/or re-submit the form." Below this is a "To" field with a dropdown menu showing "Accounts Payable (WU): Tammy Parsons (tammy.parsons@washburn.edu)". Below the dropdown is a list of email addresses: "Accounts Payable (WU): Tammy Parsons (tammy.parsons@washburn.edu)", "Department Head/Area Head/Sponsor/Stu Org1: Eric Just (eric.just@washburn.edu)", and "Requestor: Margo Stewart (margo.stewart@washburn.edu)". Below the "To" field is a "Body" field with a rich text editor toolbar. At the bottom of the form are two buttons: "Return this form for revision" (highlighted in red) and "Cancel and return to form".

Click the down arrow to obtain a list of individuals who have previously seen the PV. Select the individual to whom you want to send the email with your question(s)/request(s).

The screenshot shows the "To" field dropdown menu. The dropdown is open, showing a list of email addresses: "Accounts Payable (WU): Tammy Parsons (tammy.parsons@washburn.edu)", "Accounts Payable (WU): Tammy Parsons (tammy.parsons@washburn.edu)", "Department Head/Area Head/Sponsor/Stu Org1: Eric Just (eric.just@washburn.edu)", and "Requestor: Margo Stewart (margo.stewart@washburn.edu)".

Type your question(s)/request(s) in the body of the email.

The screenshot shows the "Body" field rich text editor. It features a toolbar with various icons for text formatting (bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, indent, outdent, decrease indent, increase indent, undo, redo) and a character count at the bottom right: "Characters (including HTML): 0".

Select "Return this form for revision"

[Return this form for revision](#) [Cancel and return to form](#)

You will see the following message and will have the option to view the form as a PDF.

This form has been returned and sent back to the previous participant.

[View Form PDF](#)

Anyone who previously approved the PV receives the following email:

From: donotreply@washburn.edu
<donotreply@washburn.edu>
Sent: Friday, May 28, 2021 9:23 AM
To: Mary Schumacher <mary.schumacher@washburn.edu>
Subject: Payment Voucher Form returned to previous participant

The Payment Voucher Form online form you recently signed is being sent back to another participant to revise their work. Once they resubmit the form, you will be required to sign again.

When the revisions are made, and the form is submitted again, it is routed to all required approvers again.