SWIFT STATEWIDE INTEGRATED
FINANCIAL TOOLS

QUICK REFERENCE GUIDE
November 1, 2019

Credit Bill Approval Process

Approvals are required for all credit bills. Staff who create credit bills (requesters) will submit the credits for approval. The request for approval will be routed to agency staff with the approval role.

- Approvers will receive a **Notification** (**Action)** when bills have been routed for their approval. The request will also display in the **Approvals** tile.

- Requesters will receive a **Notification** (**Alert)** and an email notifying them when a request has been approved or denied.

Staff	Route for Approval	Final Approval	Deny
Requester		Notification () Email	Notification () Email
Approver(s)	Approval Tile () Notification ()		

- Approvers and Requesters can check the **My Work** section of the **Billing WorkCenter** to view approval information. Inquiries include:

    o Invoices Pending My Approval

    o Invoices Not Submitted for Approval

    o Invoices Pending Approval for a selected Business Unit

When a bill is approved, the bill's Approval Status changes from "Pending" to "Approved".

Step 1: View and Approve or Deny the Credit Bill

After a credit bill has been submitted for approval, the request will display in the **Approvals** tile for staff who have the approval role.

1. Select the **Approvals** tile on your homepage. The *Pending Approvals* page appears displaying a list of items waiting for review and approval.

2. Select "Credit Invoice" from the left-menu. Credit Invoices (Bills) waiting for approval display on the right side of page.

Note: All of the transactions pending your approval are listed on the right side of the page by default, and the transactions are organized by Type. You can change the display by:

- Selecting a category on the left menu.

- Clicking on the **View By** drop-down and selecting a different option including: Date Routed, From, Priority, and Requester.

- Selecting the **Filter** (▼) icon to limit the transactions displayed in the listing by Type, Requester, From, Date Period, or Priority. After you have made your selections on the *Filter* page, click on the **Filter** button to apply the filter.

3. Select a credit bill to approve in the listing on the right.
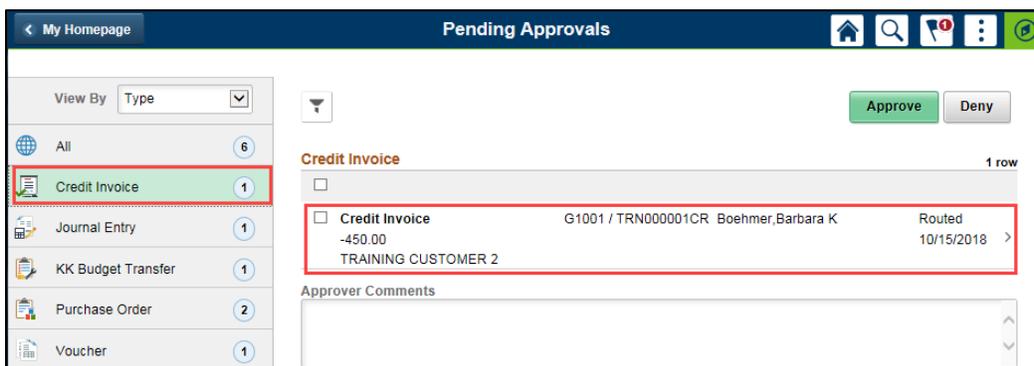
4. View the *Credit Invoice Approval Detail* page. High level information about the credit bill is displayed, including the Business Unit, Invoice Number, Amount, Customer and Customer Name, Bill Status, and Approval Status.
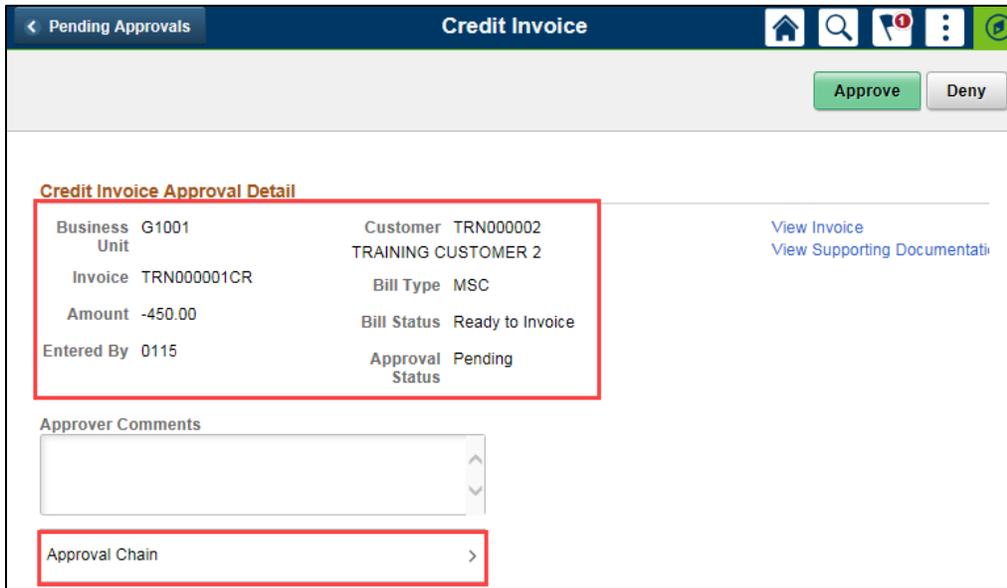
5. Click on **Approval Chain** to view any comments entered by the requester. You can also click on the **Multiple Approvers** link to view staff who can approve the credit bill.
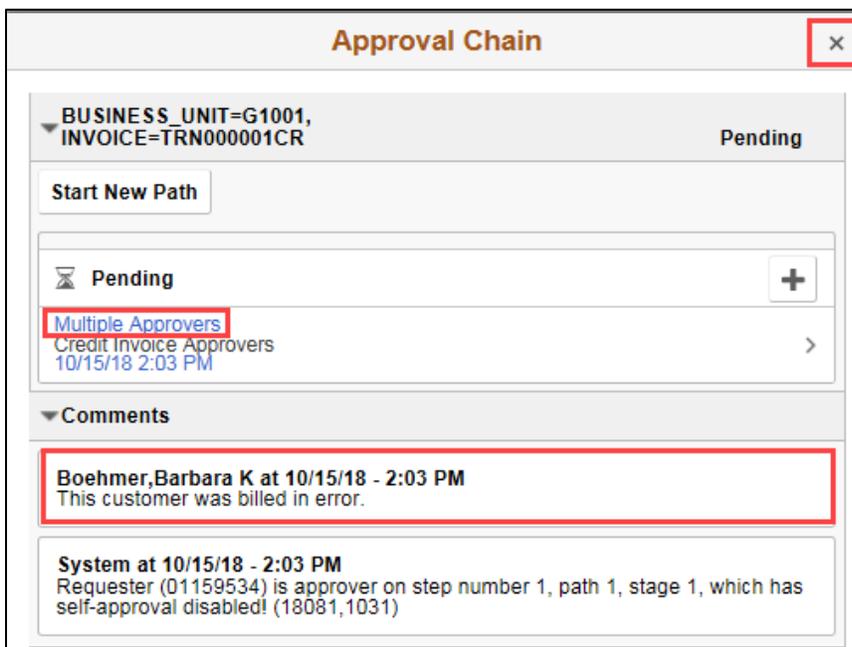
6. Close (X) the *Approval Chain* page to return to the *Credit Invoice Approval Detail* page.

7. Click on the *View Invoice* link in the upper right side of page and review the credit bill pages.

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8. Click on the **Approval** back button to return to the *Credit Invoice Approval Detail* page.

9. Enter a comment in the Approver Comments box, if applicable. If you are denying the credit bill, a comment is required.

10. Click on the **Approve** or the **Deny** button.

11. A message displays verifying your selection. Click **Submit** to finish the approval. The transaction will drop-off your *Pending Approvals* page.

- If you have several credits pending approval, you can review the credit detail and then return to the *Pending Approvals* page, select the credits you want to approve, and click on the Approve (or Deny) button. The *Mass Approve/Deny* page will display where you can add a comment and **Submit**. Any comment that you enter will apply to each selected invoice.

- If the bill is approved, the approval status on the *Billing Summary Info 2* page changes from "Pending" to "Approved" and the bill can now be processed by the Single Action Invoice process.
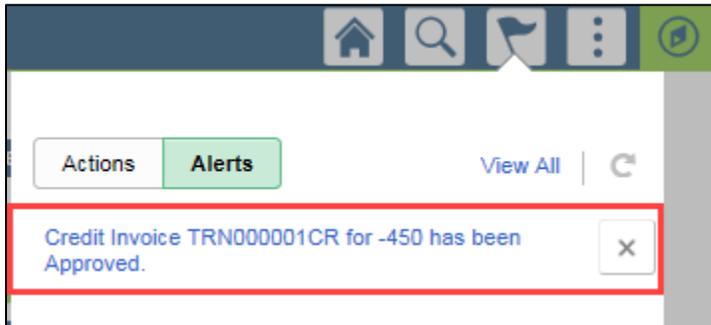
- The Requester will receive a Notification () and an email indicating that the Credit Invoice was approved or denied. A link to the Credit Bill is provided. Below is an example Notification that the Requester will receive. The notification link includes the credit bill number and indicates whether the credit bill was approved or denied.

- Below is an example email that will be sent to the Requester. The subject line of the email displays the credit invoice number, business unit, amount, and indicates whether the credit was approved or denied. A link to the credit bill is included in the body of the email, along with the credit bill information.

- The link will take the requester to the bill or the login page, depending on whether the requester is logged into the system at the time the link is selected.