SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

February 20, 2024

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:
  - Invoices Pending My Approval
  - Invoices Not Submitted for Approval
  - Invoices Pending Approval for a selected Business Unit

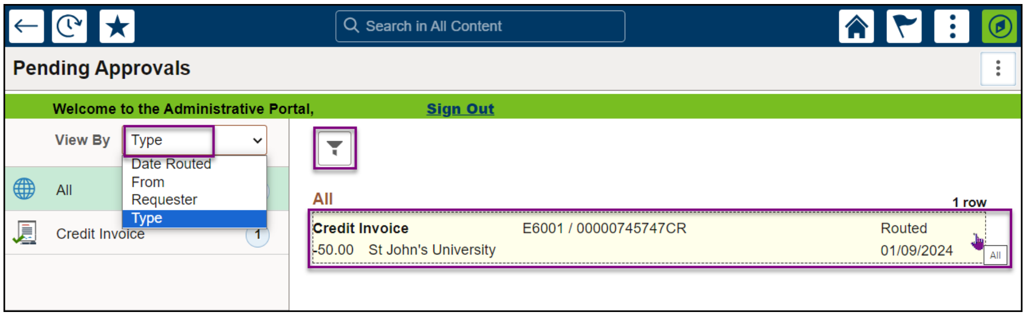
When a bill is approved, the bill's Approval Status changes from "Pending" to "Approved".

Approve or Deny a Single Credit Bill

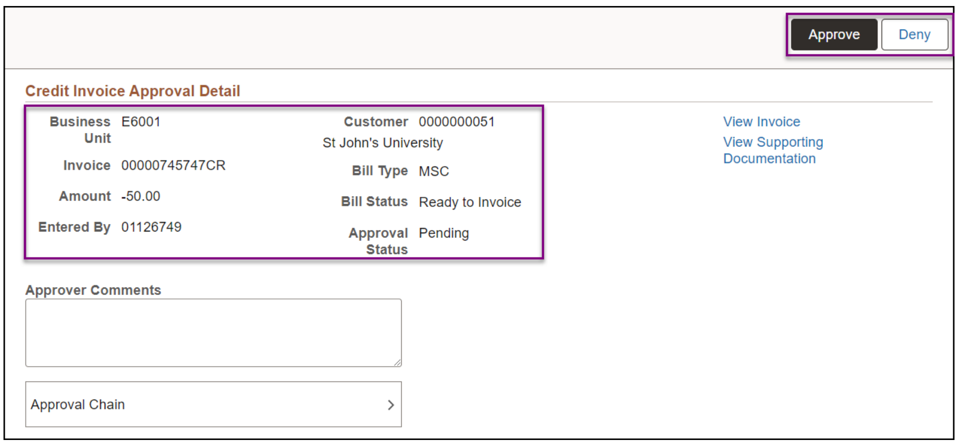
After a credit bill has been submitted for approval, the request will display in the Approvals tile for staff who have the approval role.

1. Select the Approvals tile on your homepage. The Pending Approvals page appears displaying a list of items waiting for review and approval. All transactions pending your approval are listed on the right side of the page by default, and the transactions are organized by Type.
   a. You can change your view by selecting the **Type** dropdown and selecting a different option including Date Routed, From, Priority, and Requester.
   b. Select the **Filter** icon to limit the transactions displayed in the listing by Type, Requester, From, Date Period, or Priority. After making selections on the Filter page, select the **Filter** button to apply the filter.

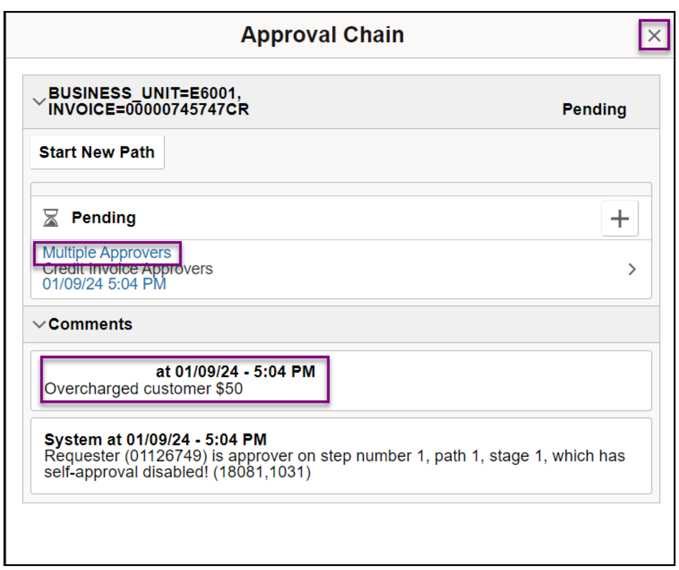
2. Select a **Credit Invoice** transaction to review the approval request.



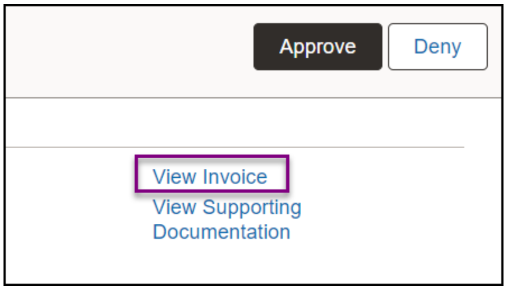
3. The Credit Invoice Approval Detail page displays. You can view high level information from here, including the Business Unit, Invoice Number, Amount, Customer and Customer Name, Bill Status, and Approval Status. You can select the **Approve** or **Deny** buttons directly from here. Below we'll demonstrate how to look for more detailed information.



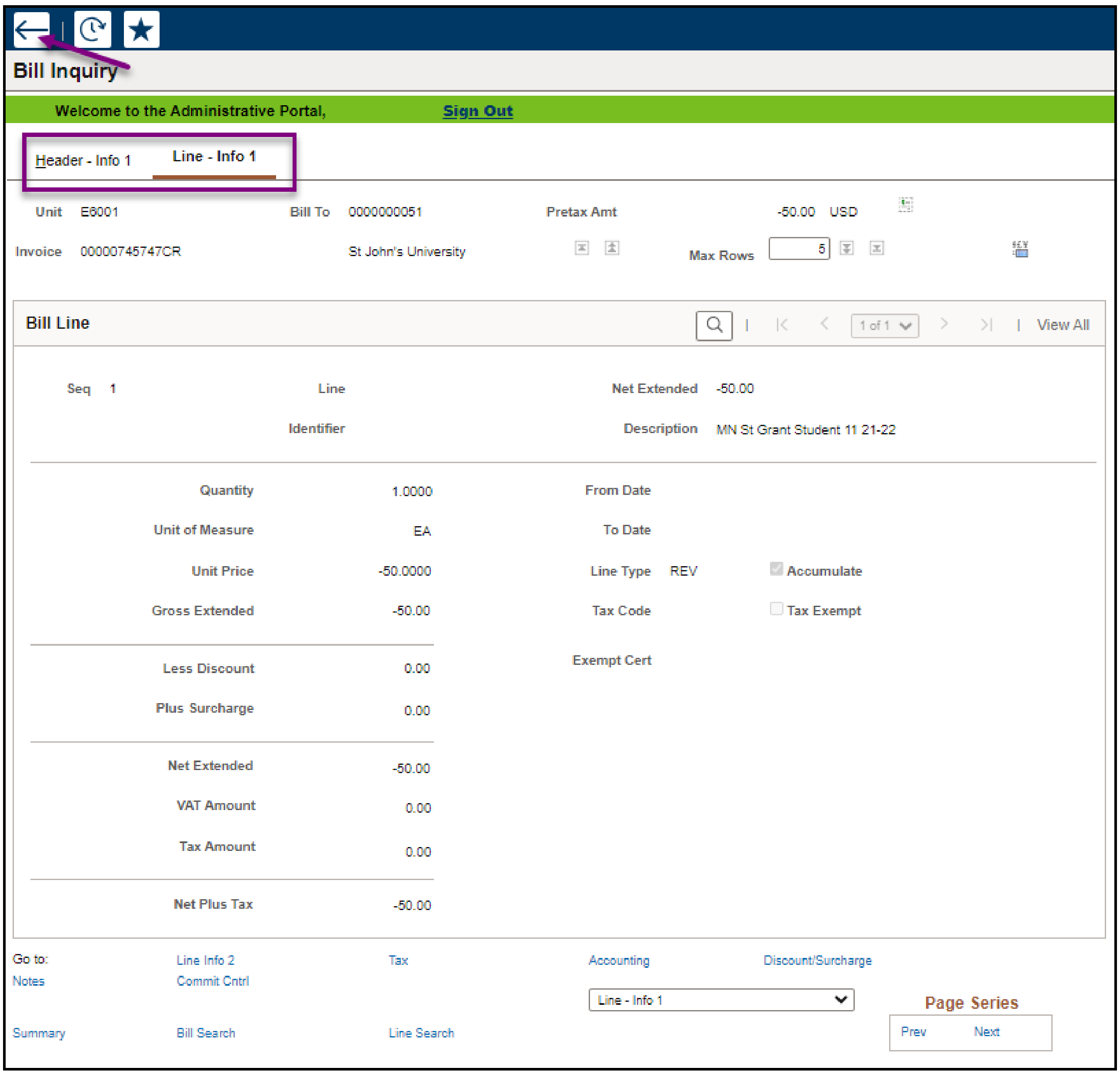
4. To review comments and information about who else can approve the transaction, select the Approval Chain box. The Approval Chain window displays. You can select the **Multiple Approvers** link to view a list of individuals who can approve the credit transaction. Comments entered by the requester display in the Comments section. Select the **X** icon to close the Approval Chain window.



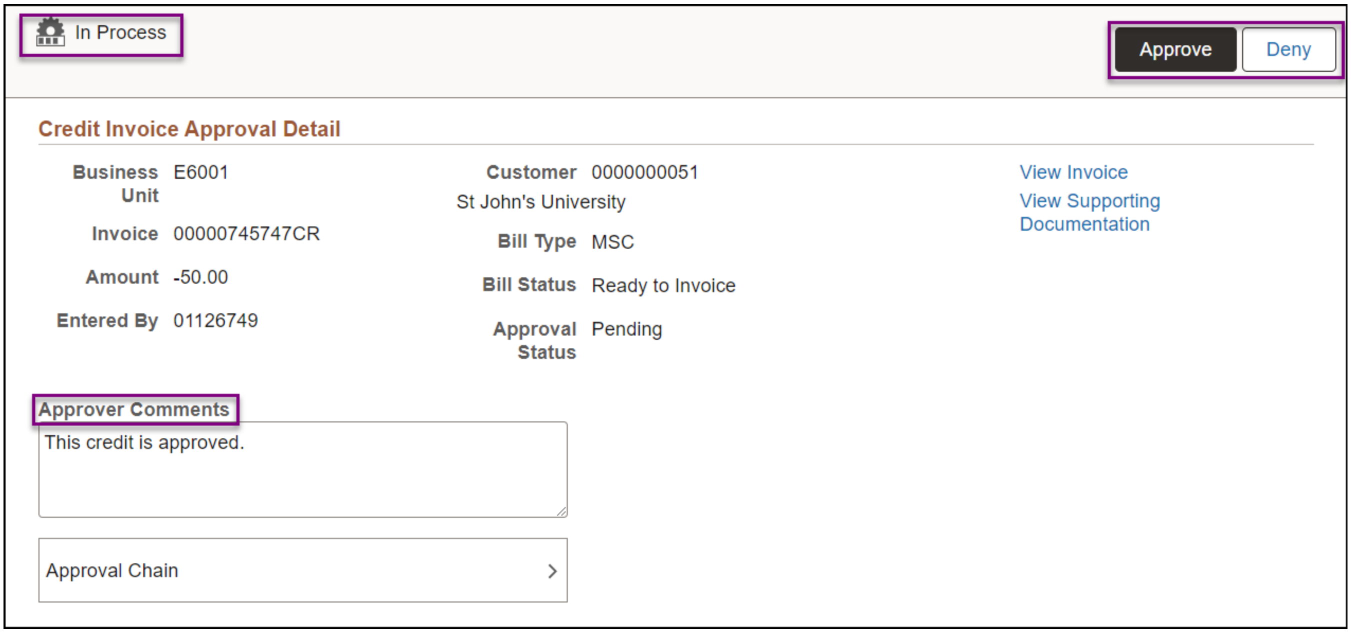
5. Select the **View Invoice** link in the upper right corner under the Approval buttons.



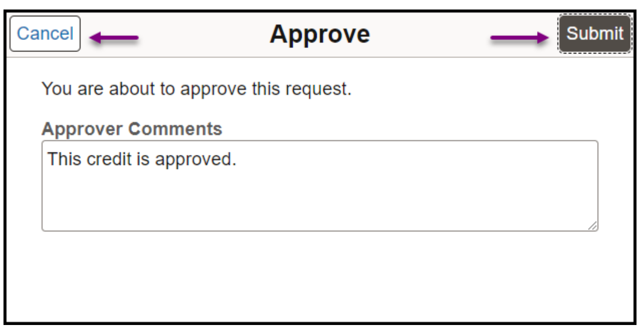
6. The invoice displays in the same browser window. Select the tabs at the top to toggle between the Header – Info 1 and Line – Info 1 pages. Select the **Back Arrow** icon in the upper left corner to return to the Approval Detail page.



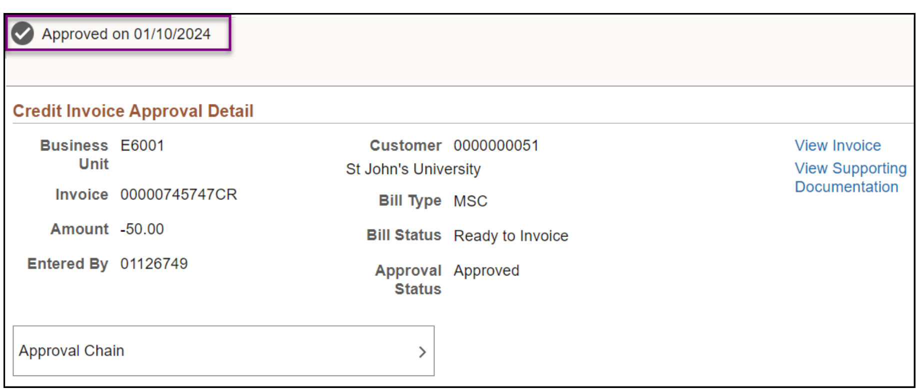
7. Notice the "In Process" status of the request. If applicable, enter a comment in the Approver Comments box. If you are denying the credit bill, a comment is required.
8. Select the **Approve** or the **Deny** button.



9. The Approve window displays verifying your selection. Select **Submit** button to finish the approval. Selecting Cancel will take you back to the Credit Invoice Approval Detail page.

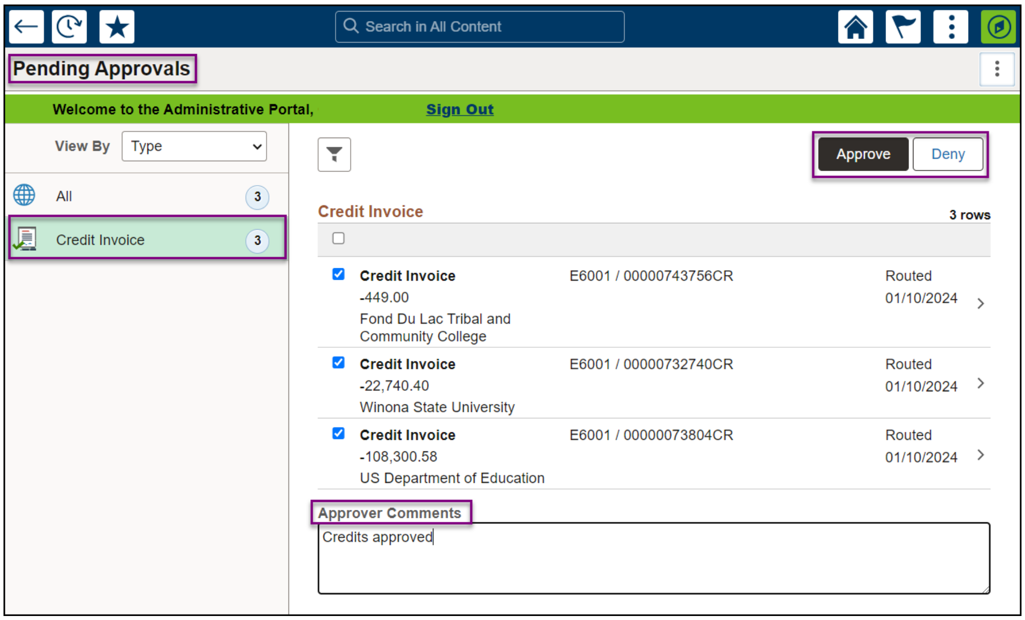


10. Notice the approved status with date and time in the upper left corner.

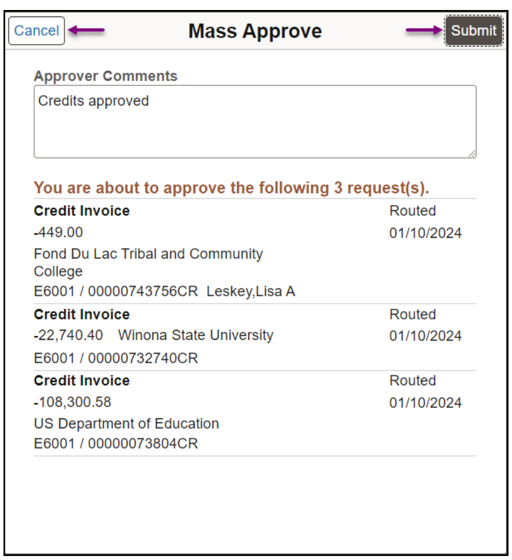


Mass Approve or Deny Credit Bills

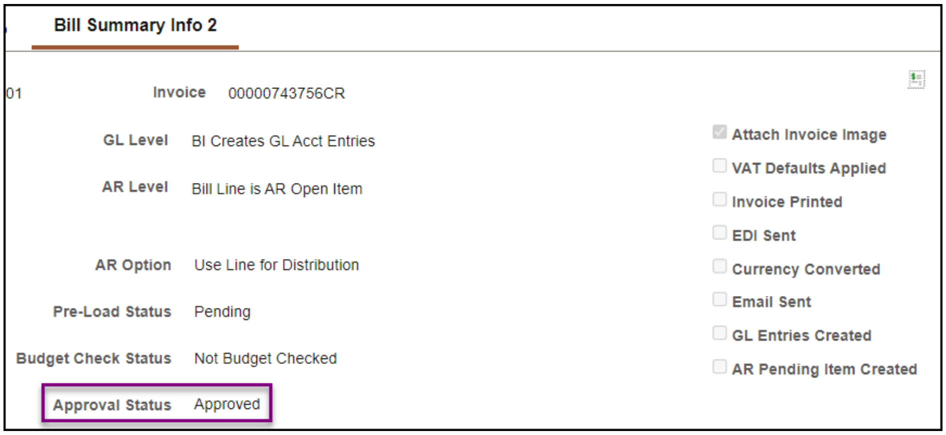
1. If you have several credits pending approval, you can review the credit detail and then return to the **Pending Approvals** page. Select “Credit Invoice” category and checkboxes appear in front of all the credit invoices. Select the credits you want to approve, add comments (you can also add comments on the next screen), and select the **Approve** (or **Deny**) button.



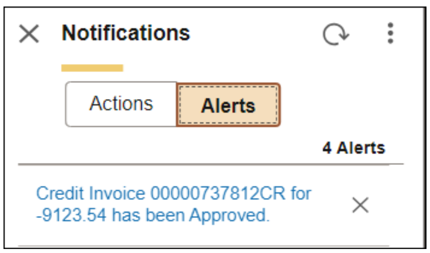
2. The Mass Approve/Deny window will display. If you haven’t done so already, you can enter comments here. Comments will be applied to each selected invoice. Select the **Submit** button. Selecting Cancel will take you back to the Pending Approvals page.



3. 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.



4. 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.



5. A notification email is also 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.