

Dynamic Forms Payment Requests Questions and Answers

What should I do if I have a payment request that requires more than one approvers?

The form allows the Initiator/Originator to add up to 3 approvers. You can also utilize the multiple approvers if, for example, your approver wants you to send it to their executive admin before it goes to them, just make sure that the executive admin is the first approver and the actual Budget Approver is the last approver.

How do I attach multiple files?

The form will automatically combine files and convert them to a single pdf if you select all of the files at the same time. Simply click the attach file button. Select “Choose Files” on the box that pops up then select all the files you want to include. If you hold down the shift key you can select adjacent files in a list or you can hold down the control button and click on specific files in a list to choose them. You may attach pdf, jpeg, word and one page excel files.

How do I verify if a vendor is in Banner?

Use the “Who/What” function on your My Missouri State page. If you do not have access to that function, please contact Computer Services at informationsecurity@MissouriState.edu for access.

What should I do if we are paying a new vendor?

Have them complete a Vendor Registration Form or W-9 if they are a business, or an Independent Contractor Form or W-9 if they are an individual. Attach this information with any other backup and write “NEW” in the M# blank on the Payment Request Form.

Who can be the Initiator/Originator for a Payment Request form?

Only individuals with Originator Access in Banner to the specific Fund-Org for that specific payment request may be the Initiator/Originator. To request Originator Access from the “Finance - Forms” Experience Card on your My Missouri State please choose the “FOAPAL – Originator/View Access Request” link and follow the instructions on the page.

What should I do if I need more FOAP lines than provided on the form?

The newest version of the form allows you up to 8 lines of FOAP.

If you need more than 8 please attach a list with the FOAP line and the amount for each line. If you are including several invoices that go to various lines of FOAP, please indicate how much of each invoice goes to each FOAP line. Please attach this list with all the other backup.

If you are attaching a separate list please put “See” in the Fund Field and “ATTACHED” in the account field on the Payment Request form.

How do I handle the Payment Request Form if it is returned to me?

Use the link in the email to access the form, make the necessary corrections or add the necessary documentation then resubmit it as before. Please note that any returns to the Initiator/Originator will require the form to be approved by the Budget Approver.

What should I do if my Department Approver says they did not receive the email notification for the payment request?

If this is the first time the approver might be receiving a payment request check they need to check their junk email box. The approver will need to go to their Junk folder, locate the email, right click on it to select Junk → Never Block Sender. Then they will need to move this email back into the Inbox. Once this has been done future emails should always go to the Inbox and they should be able to follow the link to complete the payment request.

There might have had been an error while typing in the email for the approver. Please go to your Pending/Draft Forms to locate the payment request, then click Action → Manage Co-Signers. This will open a window where you can see the email addresses of everyone the payment request is being routed to. Click on the Action button for the individual that needs correction and choose Edit Cosigner to correct and resend the email.

If the email has been accidentally deleted, or cannot be found, the Initiator can click Action → Manage Cosigners and then select the Action button on the correct individual’s line then select the Action button and select “Re-send Notification” to send the individual another email.

How can I search for a payment request?

Begin as if you are going to submit a new payment request but do not click on the “Complete Form” button. From the “My Forms” dropdown box select “Pending/Draft” Forms. On the list page there at the top near the center of the page is a box labeled “Search For.” You can type anything entered into the form to search by including vendor name, M#, amount, even invoice numbers if you entered them in the detail section. When the search is complete you can click on the Action button to view either the PDF or HTML link of any forms the search found.

How do I find out the status of my payment request?

Forms can be in either Pending/Draft Forms or Forms history.

Begin as if you are going to submit a new payment request but do not click on the “Complete Form” button. Instead follow the drop down menu of the “My Forms” button in the upper right corner of the page.

If you are looking for a current form, select “Pending/Draft” Forms to bring up the list.

If the status of the form is “Incomplete” it is in your queue for processing. Click Action → Complete Form to complete your request.

If the status of the form is “Pending” it is in another’s person’s queue for processing. Click HTML or PDF to check to see who has signed it and who needs to sign it.

If the status of the form is “Draft” it has never left your queue. Please Click Action → Complete Form to complete the request. Often this is because it did not register the clicking of the “Submit” button.

If the item is not in the list that comes up in “Pending/Draft” Forms then it has been processed through Dynamic Forms and will be entered into Banner within a few days. This item should show in your Forms History.

Is there way to access the forms I need to sign other than following the email links?

Begin as if you are going to submit a new payment request but do not click on the “Complete Form” button. Instead follow the drop down menu of the “My Forms” button in the upper right corner of the page. Select “Pending/Draft” forms. You may click the Action button and select Complete Form. If you have many forms you need to sign you can right click on Complete Form and select “Open link in new tab.” This will open a new tab for the form you need to Complete. After you complete that form you can return to your original tab and refresh the list by clicking on My Forms and select Pending/Draft forms. This will change the status of the form you just completed from Incomplete to Pending. You may sort your My Forms list by clicking on the Status column once to group all your Incomplete forms at the top of the list.

If you have a question that you did not find above, please contact the accountant or budget officer for your cost center. Also, you can let them know if you think that question should be added to the list above. Our goal is to make this as user friendly as possible.