

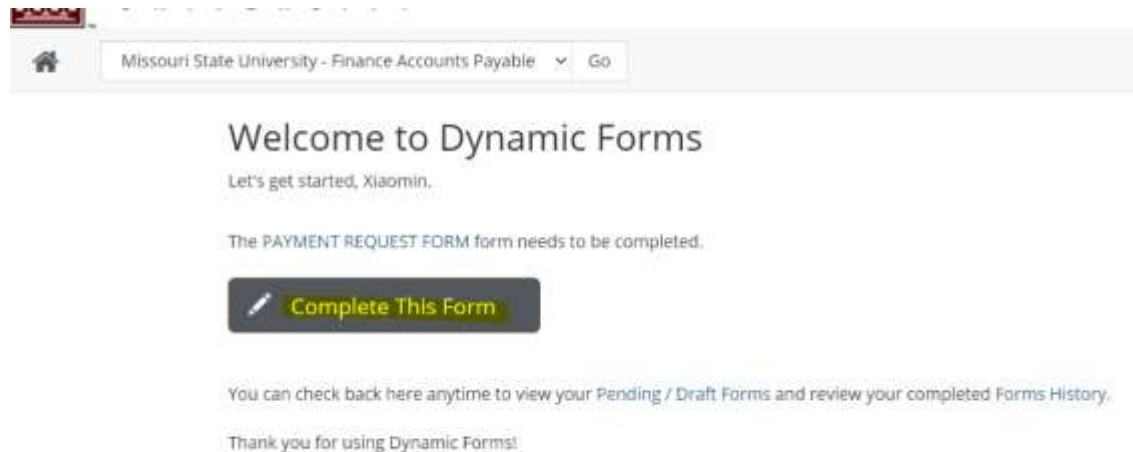
PAYMENT REQUEST FORM via Dynamic Forms

Instruction on How to fill out and approve the form

1. Link to Payment Request Form

<https://dynamicforms.ngwebsolutions.com/casAuthentication.ashx?InstID=d36cd053-4b68-4de5-983e-13080da05558&targetURL=https%3A%2F%2Fdynamicforms.ngwebsolutions.com/Submit/Form/Start/e71a1527-b76f-40d7-9c5d-b695a076261a>

User is required to use mymissouristate login and password to access the form. After logging in successfully, it opens a welcome page and click **Complete this form** button to start.



Form will prefill with **Initiator's** name and email.

First Name	Last Name	Email
* Xiaomin	* Zhou	* XiaominZhou@MissouriState.edu

2. Payment Request Form Signature Flow:

Form Participants
Participant Name
Payment Request Initiator
Department Approver
Form is back to Initiator
Accountant & Budget Officer Review
Grants/Foundation/AP Review
FS AP Reviewer

If form has University FOAP only:

Initiator (Fill out the form and sign) => **Department Approver** (sign) => **Initiator** (Form is automatically returned back to initiator after Department Approver sign off on it.

Initiator forwards the form onto correct person in FS to approve) => **Accountant & Budget Officer** (Review and approve) => **AP** (Review and Process Invoice)

If form has mixed FOAPs (University FOAP + Grant FOAP; University FOAP + Foundation FOAP)

Example:

A02000-052000 + I02875-PI0016

A02000-052000 + FN3450-102001

Initiator (Fill out the form and sign) => **Department Approver** (sign) => **Initiator** (Form is automatically returned back to initiator after Department Approver sign off on it. Initiator forwards the form onto correct person in FS to approve) => **Accountant & Budget**

Officer (Review and approve for **University FOAP**) => **Grants/Foundation Accountant** (Review and approve for **Grant or Foundation** FOAP) => **AP** (Review and Process Invoice)

Notes:

Use separate Payment Request form if the approver for each Fund-Org (FOAPAL) is different person.

3. Filling out the form by Initiator

Initiator fills out the form and signs off on it. Signature must be the exact name in Banner and user cannot sign with any other name.

Notes:

Your signature name is the name in MSU active directory, if you notice your name is incorrect, please contact us at BannerFinance@MissouriState.edu and we will have IT to check on that.

The screenshot shows the top portion of a web form. It features two horizontal lines for signatures and dates. The first line has a handwritten signature 'Xiaomin Zhou' and the date '09/02/2020'. Below the signature line is the text '(SIGNATURE OF PERSON MAKING REQUISITION)' and below the date line is 'Date'. The second line is for the 'APPROVING SIGNATURE OF BUDGET APPROVER' and 'Date'. At the bottom, there are two buttons: 'Save Progress' and 'Submit Form'.

Once the form is completed, initiator signs the form and click the "Submit Form" button to forward payment request over to **Department Approver** for signature. **INITIATOR MUST TYPE IN DEPARTMENT APPROVER'S NAME AND EMAIL.** (If the email is typed incorrectly, please contact accountant or budget officer in Financial Services and they can help correct the email, it is highly recommended that you copy the email from outlook to void mistake.)

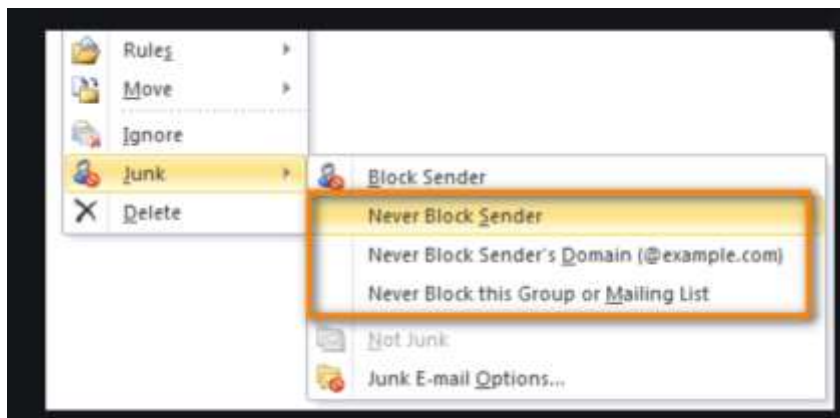
The screenshot shows a form titled 'Department Approver'. It contains three input fields: 'First Name' with the value 'jon', 'Last Name' with the value 'Smith', and 'Email' with the value 'jonSmith@MissouriState.edu'.

Once the form is sent to department approver, he or she will receive an email notification below with a link for them to log into Dynamic Forms to approve the payment request.

(The first email notification will go to user's Junk box, so user will have to do some setup so that future emails will not go to Junk.)



Go to Junk folder and locate the email, and right click the email, select **Junk => Never Block Sender**. Then move this email to your Inbox. Once this is done, all future emails from will go to user's Inbox.



4. Department Approver Acting (approver or return) on the form:

PAYMENT REQUEST FORM has been submitted by Xiaomin Zhou. Please **Click here to complete your section of the form.**



Department approver clicks the link from his/her email and logs in with MyMissouriState user name and password. Once logged in, Department approver will click “Complete This form” to take action on Payment Request.

Welcome to Dynamic Forms

Let's get started, Xiaomin.

The PFR DEMO form needs to be completed.

 **Complete This Form**

You can check back here anytime to view your Pending / Draft Forms and review your completed F

Thank you for using Dynamic Forms!

★
(click to sign)

(APPROVING SIGNATURE OF BUDGET APPROVER) Date _____

Save Progress **Return for Revision** Submit Form

- a. **Approving the form:** To approve the form, Department Approver just needs to sign their name and click “**Submit Form**” button.

★
.....3036323636
Xiaomin Zhou

(APPROVING SIGNATURE OF BUDGET APPROVER) 02/05/2021
Date _____

Save Progress Return for Revision **Submit Form**

Once the form is signed and submitted by department approver, system sends this form back over to **initiator** automatically. (The design of having the form going back to Initiator is to allow initiator finding the correct accountant from Financial Services to approve this payment request. For example, grant FOAPs should go to grant accountant for approval, foundation FOAPs should go to foundation accountant.)

- b. **Return for Revision:** Department Approver could use Return for Revision function to reject the form if they do not approve such expense or would like the initiator to correct the information on the form. By clicking Return for Revision, it will open an email window for approver to type the message in the subject and Body for rejection email.

and click **SUBMIT FORM** button.

Payment Request Initiator: Xiaomin Zhou (XiaominZhou@MissouriState.edu)

Subject

Body

Characters (including HTML): 0

Attention
If you prefer, Next Gen will create a link for the form user to access the returned form. If you do not wish for us to create the link (for example, if you prefer the user to log into dynamic forms on their own and access the form from their returned list) you may indicate that below.
☒ Add a link to the returned form at the bottom of this email?

Return form for revision

Returned form will go back to Initiator, which he/she can make the correction and re-submit back to Department Approver for approval.

If it is decided that such payment request should not be initiated in the first place, then Initiator does not have to do anything, such form will stay in Returned queue.

5. Form is back to Initiator to route to Financial Services Staff.

Once the approver has approved the request, form will be automatically routed back to initiator where they can forward the form over to Financial Services accountant for final approval. Initiator will get an email notification below once the department approver approves and submits the form.

Please forward PAYMENT REQUEST FORM over to Fina...

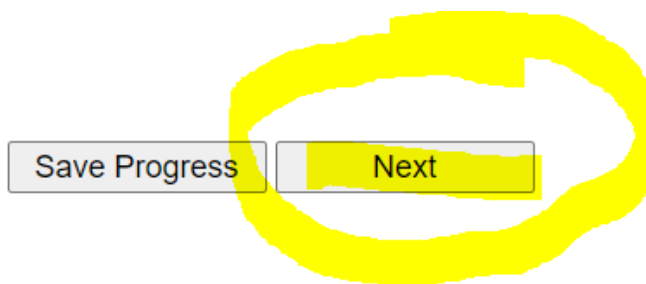


CAUTION: External Sender

PAYMENT REQUEST FORM has been signed (approved). Please forward to Financial Services to process. Please [Click here to complete your section of the form.](#)



Initiator will just need to click the link above and it will take them to the form, and all they need to do is to Click Next button.



Once they click Next, it will take them to the page below to **SELECT** an Accountant or Budget Officer **from DROP DOWN list** to approve/review the payment request. Depending on the FOAPL on the form, initiator has option to send the form to University staff (Amy, Jing, Julie or others,) or Grant staff Teresa, or Foundation Accountant Debbie.

Please specify the next form participant:

Accountant & Budget Officer Review

Accountant: Daniels, Amy

Contact information is in the format Description: Last Name, First Name

Previous: Continue

Once the form is reviewed and approved by Financial Services accountant or budget officer. it will be forwarded over to Accounts Payable to issue the invoice to pay.