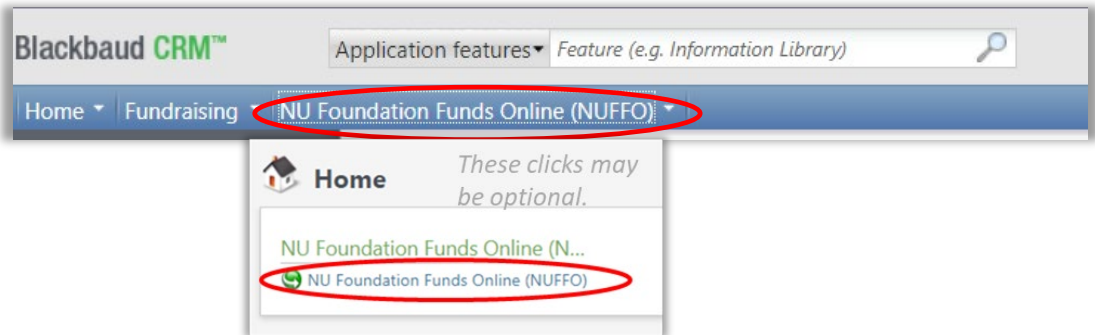
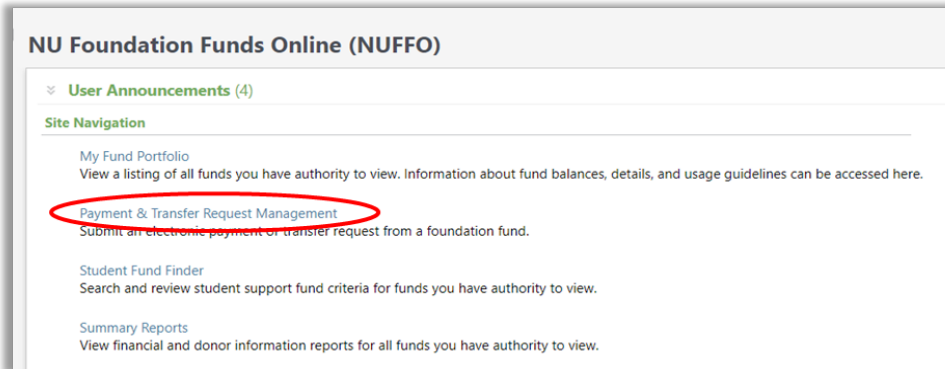


APPROVER JOB AID TRANSFER AND PAYMENT REQUESTS

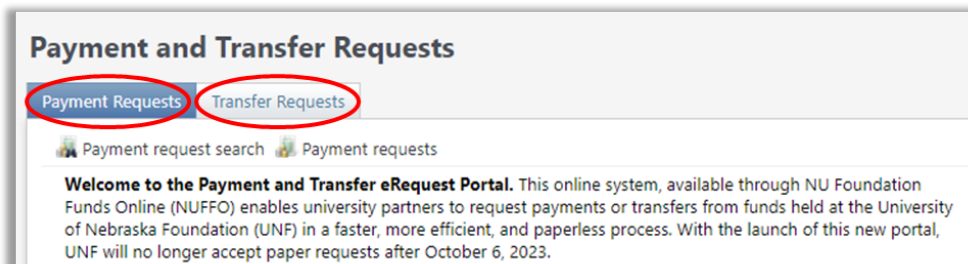
1. Decide how it will be easiest for you to work your list of pending review items. Two options:
 - A. Work from links provided within the *most recent email* daily digest update(s) sent from the University of Nebraska Foundation. Click each link to address every pending review item. *Jump to step 8. –or–*
 - B. Work the pending queue in the **Payment Request** area in NUFFO. Then work **Transfer Requests**.
2. Log in to Ali+NUFFO – <https://ali.nufoundation.org>. Navigate to the NUFFO home page.



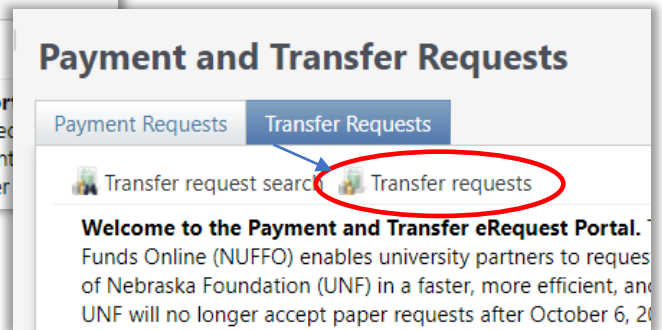
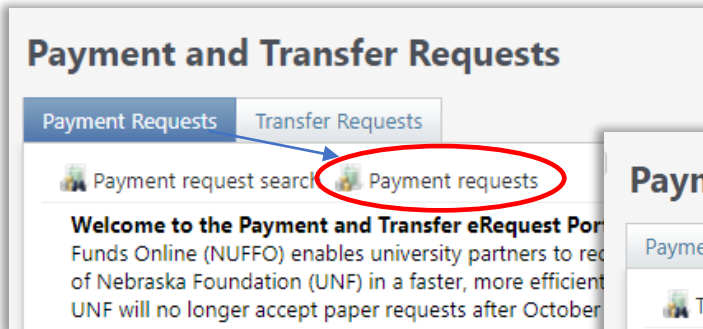
3. On the NUFFO home page, click **Payment and Transfer Request Management**.



4. Click **Payment requests** (or **Transfer requests**).

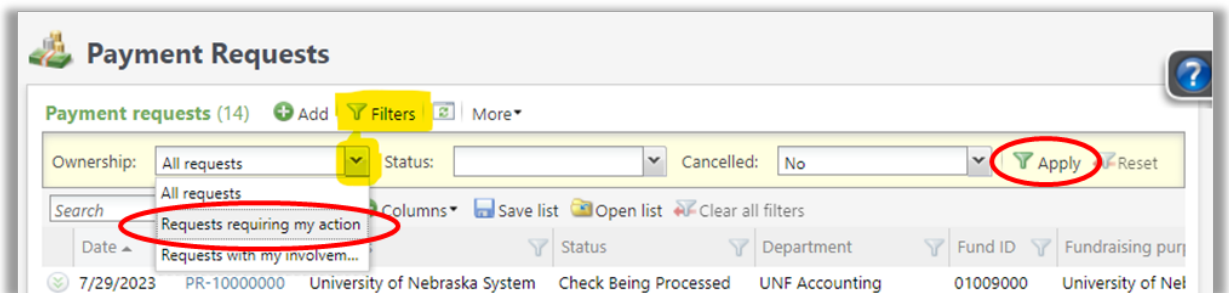


5. Click **Payment requests** (or **Transfer requests**).

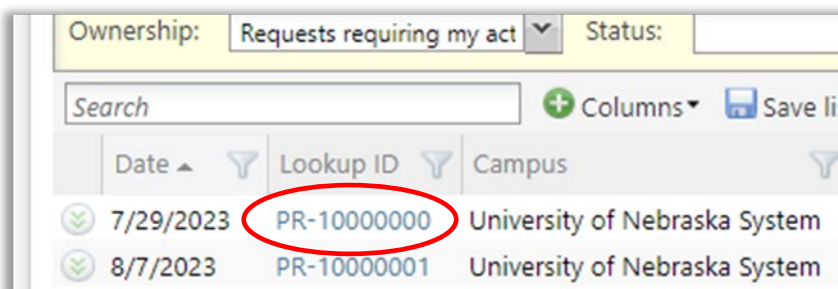


6. If you do not see the yellow filters bar, click the **Filters** button.

- **Ownership:** Requests requiring my action.
- **Status:** Leave blank to include all.
- **Cancelled:** No.
- Click **Apply**.



7. Click the blue **PR-** or **TR-** hyperlink to open the request record.



8. Review the request record.

- The **top half** of the record displays details entered by the request creator on the original request intake form.
- The **bottom half** of the record provides additional details:
 - **Attachments** tab: View supporting documentation. May be one or multiple pages uploaded as one or multiple files. Click a blue hyperlink to open the document(s).
 - **Spending Authorities** tab: View the spending authority(-ies) of the foundation fund to which this request is being charged. (OPTIONAL)
 - **Status History** tab: View a history of status changes for this request.
 - If the request is rejected, the Approver *must* provide a note as to why the request was rejected so the request creator can see why. The request creator may edit/resubmit or cancel the request. (OPTIONAL)

Payment Requests
Payment Request PR-10000000

Request information	Department and contact information	Payee information
Date: 7/29/2023	Department: UNF Accounting	Invoice number: 12345
Lookup ID: PR-10000000	Campus address: 1010 Lincoln Mall Ste 300	Vendor ID: 1394
Campus: University of Nebraska System	ZIP code: 68508	Vendor name: HYVEE
Net amount: \$30.00	Contact name: Aaron Rouse	Address: 5010 O ST
Sales tax: \$2.18	Contact phone: 4024691676	City: LINCOLN
Gross amount: \$32.18	Contact email: aaron.rouse@nufoundation.org	ZIP code: 68510
Student payment: No		State: Nebraska
Check number:		W-9 on file: No
Status	Foundation fund	
Status: Check Being Processed	Fund ID: 01009000	
Updated by: Aaron S. Rouse on 08/08/2023	Fundraising purpose: University of Nebraska Foundation Development Fund	
Comments:	Dual signature required: No	
Created by: Aaron S. Rouse on 07/29/2023		
Purpose		
Test		

Review Details

Review Supporting Documentation

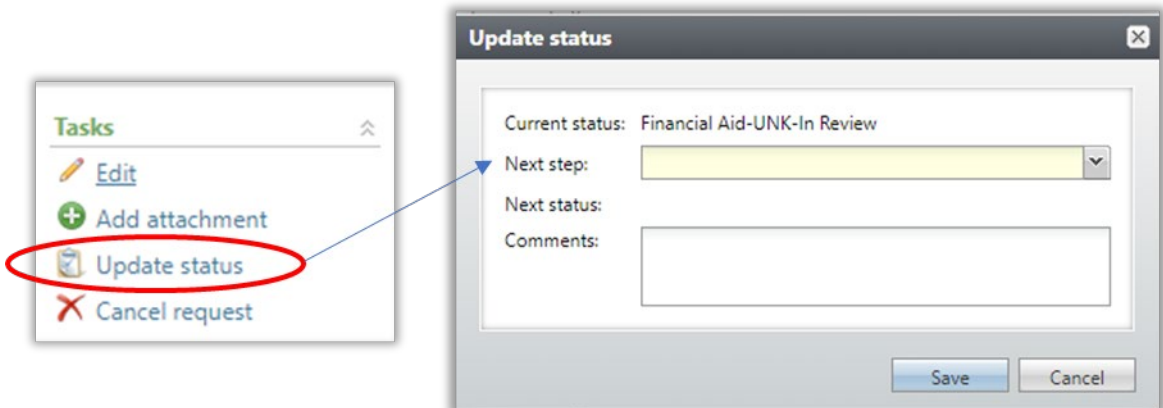
Attachments Spending Authorities Status History

Attachments (5) [Add attachment](#) [More*](#)

File	URL	Size	Status	Status message	Date added
Invoice.pdf		195.5 KB	Deleted		8/15/2023 9:01:51 AM
01163960.pdf	https://108391test.app.cloud.pape...	622.6 KB	Uploaded	Completed	8/15/2023 9:29:43 AM
01163980.pdf	https://108391test.app.cloud.pape...	215.4 KB	Uploaded	Completed	8/15/2023 9:59:46 AM
01163980-1.pdf	https://108391test.app.cloud.pape...	234.1 KB	Uploaded	Completed	8/15/2023 10:48:02 AM
PaperSave Test Documentation.pdf	https://108391test.app.cloud.pape...	12.2 KB	Uploaded	Completed	8/15/2023 5:08:46 PM

The document will open in a new Chrome tab, in a PaperSave window which offers navigation between pages (top center via thumbnail, or lower left corner via page count), and zoom and rotate tools (lower right corner).

9. Take action. As approver, your options appear in the upper-left corner of the request record, in the **Tasks** list.
 - Click **Update status**. Usually only two options will appear: approve or deny.
 - *However*, if this request is no longer needed, note the available **Cancel request** option.
 - The request creator, the current approver or UNF finance can cancel requests.
 - Cancelled requests can be restored by the person in whose queue the request currently appears or by a non-step owner by emailing a request to fundmanagement@nufoundation.org. Reference the PR- or TR- number and include a hyperlink (the URL) to the request record.
 - To approve or deny, select the appropriate **Next step**.
 - **Comments** are required only if the request is being rejected.
 - Click **Save**.



- NUFFO’s **automated electronic workflow** moves each request to the next-level reviewer and sends the reviewer an email alert.
- If a **student benefit** is provided as part of the fund request, the system will route the request to the campus financial aid office for approval.
 - Funds for **student financial aid** (scholarships, fellowships and student awards) are *not* part of the new automated process.
- If the request includes an **award to a staff member**, the system will send an email to campus payroll when the request is ready to be reviewed.

NEED-TO-KNOWS

- **Google Chrome** is the preferred browser for Ali+NUFFO.
- A **request creator** completes an online intake form, attaches supporting documentation and saves the record to create the request.
 - Request creators can see the fund balance and **pending request fund balance** during the request draft creation process.
- When a request is ready to move forward in the approval process, the request creator changes the status of the request, and an email notification is received by the initial approver, the **spending authority(-ies)**.
 - This includes any **designated** spending authority(-ies).
 - If a fund requires **dual** signature authority, both spending authorities will receive notification of pending action.
 - View the [overview graphic of the request process](#) for more information.
- **Surrogate approvers**
 - Request creators, spending authorities and designated spending authorities cannot set up temporary surrogate users.
 - Individuals responsible for approving steps in the university financial aid process, in the payroll process and at the foundation can assign a surrogate user.
 - Download [this pdf](#) to learn more about fund authorities and request roles.
- **Whatfix** is Ali+NUFFO's built-in companion support tool when using Google Chrome. Visit UNF's [Whatfix information page](#) for more information. To request a link to the one-time secure Chrome extension installation page, email training@nufoundation.org.
- Need help? Visit the Ali Community's [Payment and Transfer request page](#) for additional resources, instructional videos, FAQs and more information.