

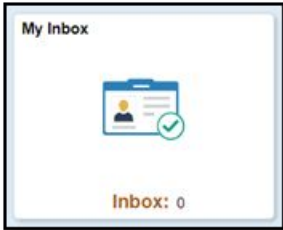
Approval Process



Approval Basics

- **ALL** RA, TA and UGF awards must have a minimum of 1 (one) approval, completed by someone other than the person who added/edited the award.
 - The system will not allow you to approve your own entries regardless of your PeopleSoft/GPortal “role”
- Award Approvals may only be done by persons with the “Acad Unit RA/TA/UGF Apprvl Mgr” PeopleSoft role **AND** whom are designated as a 1st Approver, 2nd Approver or Primary for the academic org that student is enrolled in
- Upon approval, awards “push” to the Financial Aid system
- Upon rejection, GPortal Financial will send an email notification to the person who entered the award; at that point, if the award is still desired, a new entry will be required.

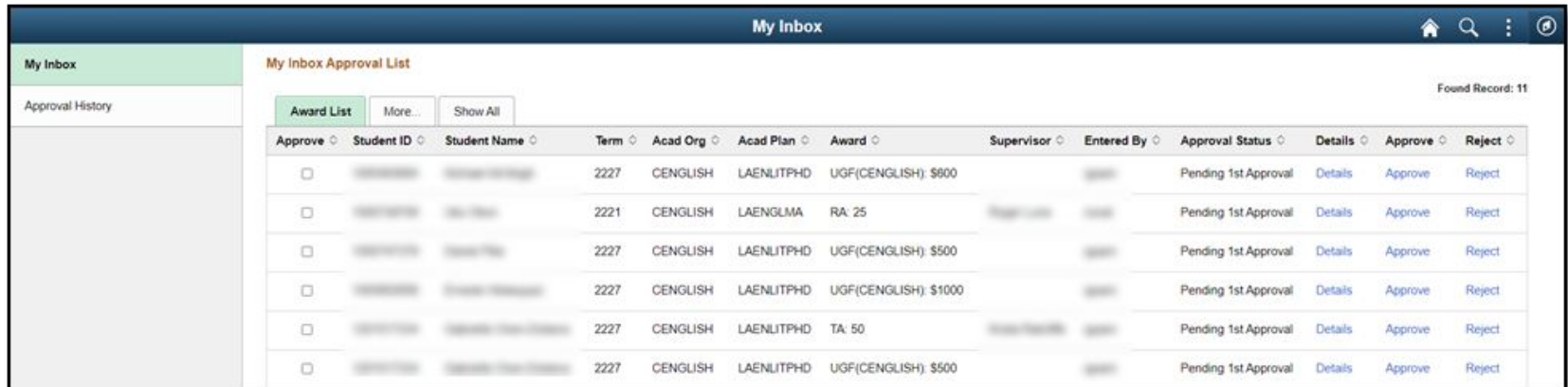
Approval Basics



Award approvals are done through the MyInbox feature

1. Select “My Inbox” from the GPortal Financial Homescreen.

Approvers (Primary, 1st or 2nd Approvers) will be able to see all awards waiting in their queue and act on them from here.



The screenshot shows the 'My Inbox' interface with a table of pending award approvals. The table has columns for 'Approve', 'Student ID', 'Student Name', 'Term', 'Acad Org', 'Acad Plan', 'Award', 'Supervisor', 'Entered By', 'Approval Status', 'Details', 'Approve', and 'Reject'. The 'Approval Status' for all entries is 'Pending 1st Approval'.

Approve	Student ID	Student Name	Term	Acad Org	Acad Plan	Award	Supervisor	Entered By	Approval Status	Details	Approve	Reject
<input type="checkbox"/>	222222	John Doe	2227	CENGLISH	LAENLITPHD	UGF(CENGLISH); \$600		John Doe	Pending 1st Approval	Details	Approve	Reject
<input type="checkbox"/>	222222	John Doe	2221	CENGLISH	LAENGLMA	RA 25		John Doe	Pending 1st Approval	Details	Approve	Reject
<input type="checkbox"/>	222222	John Doe	2227	CENGLISH	LAENLITPHD	UGF(CENGLISH); \$500		John Doe	Pending 1st Approval	Details	Approve	Reject
<input type="checkbox"/>	222222	John Doe	2227	CENGLISH	LAENLITPHD	UGF(CENGLISH); \$1000		John Doe	Pending 1st Approval	Details	Approve	Reject
<input type="checkbox"/>	222222	John Doe	2227	CENGLISH	LAENLITPHD	TA; 50		John Doe	Pending 1st Approval	Details	Approve	Reject
<input type="checkbox"/>	222222	John Doe	2227	CENGLISH	LAENLITPHD	UGF(CENGLISH); \$500		John Doe	Pending 1st Approval	Details	Approve	Reject

Approval Basics

Approvers have several choices on this page:

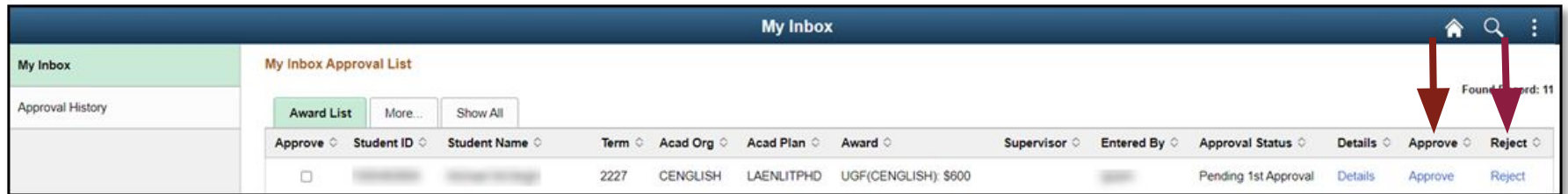
2. Select “Show All” to see additional fields



The screenshot shows the 'My Inbox Approval List' interface. The 'Show All' button is highlighted with a red arrow. The table below shows the columns available after clicking 'Show All':

Approve	Student ID	Student Name	Term	Acad Org	Acad Plan	Award	Supervisor	Entered By	Approval Status	Details	Approve	Reject	Hiring Dept	IPOS Status	Residency	Last Updated By	Last Action Date	Exception
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2a. “Approve” or “Reject” individual awards



The screenshot shows the 'My Inbox Approval List' interface with the 'Approve' and 'Reject' buttons highlighted with red arrows. The table below shows the data for one award:

Approve	Student ID	Student Name	Term	Acad Org	Acad Plan	Award	Supervisor	Entered By	Approval Status	Details	Approve	Reject
<input type="checkbox"/>			2227	CENGLISH	LAENLTPHD	UGF(CENGLISH): \$600			Pending 1st Approval	Details	Approve	Reject

Approval Basics

2b. Select several awards to “approve” at once (this is not an option for “rejecting”)

Check off each award approving and click “Approve Selected Awards” from bottom of list

The screenshot displays the 'My Inbox Approval List' interface. The table contains the following data:

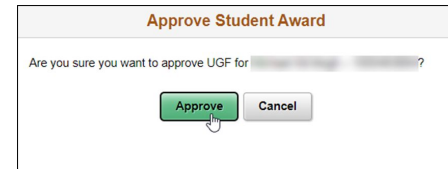
Approve	Student ID	Student Name	Term	Acad Org	Acad Plan	Award	Supervisor	Entered By	Approval Status	Details	Approve	Reject
<input type="checkbox"/>	[Redacted]	[Redacted]	2227	CENGLISH	LAENLITPHD	UGF(CENGLISH): \$600	[Redacted]	[Redacted]	Pending 1st Approval	Details	Approve	Reject
<input checked="" type="checkbox"/>	[Redacted]	[Redacted]	2221	CENGLISH	LAENGLMA	RA: 25	[Redacted]	[Redacted]	Pending 1st Approval	Details	Approve	Reject
<input checked="" type="checkbox"/>	[Redacted]	[Redacted]	2227	CENGLISH	LAENLITPHD	UGF(CENGLISH): \$500	[Redacted]	[Redacted]	Pending 1st Approval	Details	Approve	Reject
<input type="checkbox"/>	[Redacted]	[Redacted]	2227	CENGLISH	LAENLITPHD	UGF(CENGLISH): \$1000	[Redacted]	[Redacted]	Pending 1st Approval	Details	Approve	Reject
<input checked="" type="checkbox"/>	[Redacted]	[Redacted]	2227	CENGLISH	LAENLITPHD	TA: 50	[Redacted]	[Redacted]	Pending 1st Approval	Details	Approve	Reject
<input type="checkbox"/>	[Redacted]	[Redacted]	2227	CENGLISH	LAENLITPHD	UGF(CENGLISH): \$500	[Redacted]	[Redacted]	Pending 1st Approval	Details	Approve	Reject

A red arrow points to the 'Approve Selected Awards' button at the bottom of the list.

Approval Basics

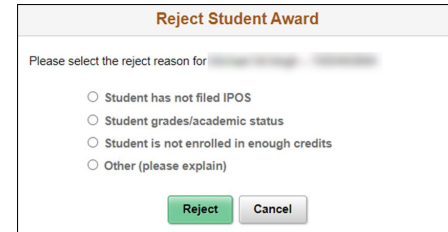
3. Confirm approval/rejection of award(s)

- Upon selecting to “**approve**”, you will get a confirmation “pop-up”
- Upon selecting “**reject**”, you will be asked to provide a reason from several choices
 - Selecting “**other**” which will require you to enter a reason
- The reason selected will be included in the email sent to the user who entered this award



Approve Student Award

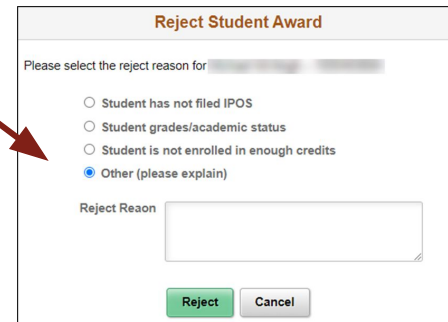
Are you sure you want to approve UGF for [redacted]?



Reject Student Award

Please select the reject reason for [redacted]

Student has not filed IPOS
 Student grades/academic status
 Student is not enrolled in enough credits
 Other (please explain)



Reject Student Award

Please select the reject reason for [redacted]

Student has not filed IPOS
 Student grades/academic status
 Student is not enrolled in enough credits
 Other (please explain)

Reject Reason