

## Instructions for SOA eForm for External Hosting ShortCode greater than \$75

### Need help?

Contact Reconciliations  
734-615-2000 press 3, press 1  
soareconciliation@umich.edu  
M-F, 8:00AM-5:00PM

### Step 1: Select the type of support

- \* Select type of support ?
- PO Voucher - Between \$1,500 and \$10,000
- External Hosting ShortCode - greater than \$75

1. Select the **External Hosting ShortCode - greater than \$75** radio button under **Select type of support**. Additional required and optional fields will display after selecting the button.

### Step 2: Complete the eForm fields

\* ShortCode ?  
123456

\* Dollar amount ?  
123.45

Supplier  
Panera

City, State  
Ann Arbor, MI

Event Date  
2019-07-09

\* Approver (the individual that approved the hosting expense) ?  
Kate Barker

\* Business purpose ?  
All day supervisor's training

\* Attendees including affiliation ?  
▶ More information  
see attached

Comments

2. Enter the U-M ShortCode (required).
3. Enter the total dollar amount (required).
4. Enter the name of the Supplier (optional).
5. Enter the Supplier City and State (optional).
6. Click on the drop down menu to enter the event date (optional).
7. Enter or search for the name or Uniqname of the authorized approver (required).
8. Enter the Business purpose (required).
9. Enter or attach the list of attendees (required)
10. Enter a comment (optional).

### Step 3: Attach Supporting Documents (if applicable, such as a receipt and/or attendee list)

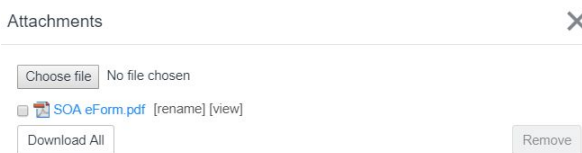


1. Click the paperclip icon located in the upper right section of the SOA eForm. The **Attachments** pop up window will then display for your use.



2. Click **Choose file** to locate the document file(s) on your computer. Select the file from your computer to attach and click **Open**. Click on **OK** when you get the confirmation (not shown).

**Note:** to attach additional documents, repeat step 2 above.



3. The filename displays in the Current file attachments section.

4. Click on **OK** when you get the confirmation. (not shown)

**Note:** If you selected the incorrect file to attach, check the box next to the filename and click **Remove**.

### Step 4 Submit the eForm



To send the SOA eForm information and any attachments to the SSC, click the Submit button located at the bottom right of the SOA eForm.



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