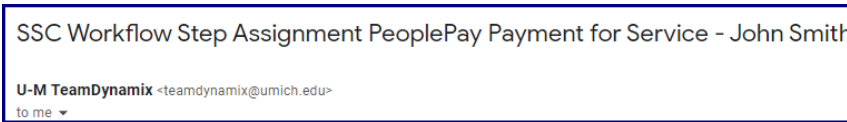




## How To Approve a PeoplePay Payment in TeamDynamix

1. When a PeoplePay payment is ready for your approval, you will receive an email from U-M TeamDynamix with the subject line: **“SSC Workflow Step Assignment PeoplePay Payment for [type of payment] - [Payee Name]”**

**Note:** The email will include all payment information in the ticket details, for your review. Any attachments and conversations are also visible within the ticket.



Workflow Step Assignment	
You are assigned to the "I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions." Approval workflow step.	
To act on this Approval step, click the link below: <a href="#">I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions. Workflow Step</a>	
Ticket Details	
ID	387791
Title	I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions.
Description	
Created By	Malorie Lauzon
Date Created	Tue 11/17/20 12:45 PM Eastern Standard Time
Requestor	Malorie Lauzon
Responsible Group	SSC-PaymenttoIndividualsProcessing
This individual is a	Non-U-M Affiliated
The name of the individual I would like to pay is (Note: If individual has multiple names, please use the format Last name/surname, First name, Middle name)	John Smith
Payee address	123 Main Street, Ann Arbor, MI 48104
The individual's email address is	<a href="mailto:johnsmith@gmail.com">johnsmith@gmail.com</a>
I would like to pay them for	working
The amount I would like to pay is	1000
The shortcode(s) I would like to charge this to is	123456
The date(s) of service are (Please list each date)	11/1/2020
Will you be paying this individual multiple times?	No
Where was the individual when services were performed? (ex: Michigan, California, Germany)	Michigan
Is this payment associated with a Procurement contract or agreement?	No
Citizen status	US citizen, Permanent resident, or Resident alien
The individual wants to be paid by	Check

2. To review and approve the payment, click the link **I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions**. This will take you to the ticket in TeamDynamix.

**Note:** You may also view your outstanding approval requests via [TeamDynamix Client Portal - Approvals](#). Click the ticket you wish to review and approve. Then, proceed to the next step.

**Workflow Step Assignment**

You are assigned to the "I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions." Approval workflow step.

To act on this Approval step, click the link below:

[I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions. Workflow Step](#)

- You are now on the approval page. From here, you can approve or reject the ticket, or view more information. If you already have enough information to approve or reject the payment, skip ahead to Step 6 in this procedure. Otherwise, continue to Step 4 to view more information about this payment.

### Current Workflow Step

#### Service Request Details

Service Request  
387791: [PeoplePay Payment for Service - John Smith](#)

#### Approval Step Details

Step  
I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions.


Assigned To  
- [Malorie Lauzon](#)

The workflow will move forward once all approvers approve this step.

At present, this step is at 0 of 1 approval vote.

Description  
Approval step 1

Requestor



**Malorie Lauzon**  
[mchalf@umich.edu](mailto:mchalf@umich.edu)

- Click the **PeoplePay Payment for [type of payment] - Payee Name** link to view more information from the ticket.

### Current Workflow Step

#### Service Request Details

Service Request  
387791: [PeoplePay Payment for Service - John Smith](#)

**Note:** From the ticket, you can view all payment information, including attachments (upper-right corner) and any conversations in the feed (at the bottom) that may have taken place regarding this payment.

Workflow  
PeoplePay Payment Approval

Current Workflow Steps  
I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions.  
48 Hour wait

Created Tue 11/17/20 12:45 PM by Malorie Lauzon Last Modified Tue 11/17/20 1:18 PM by Malorie Lauzon

This individual is a Non-U-M Affiliated

The name of the individual I would like to pay is (Note: If individual has multiple names, please use the format Last name/surname, First name, Middle name)  
John Smith

Payee address  
123 Main Street, Ann Arbor, MI 48104

The individual's email address is  
johnsmith@gmail.com

I would like to pay them for working

The amount I would like to pay is  
1000

The shortcode(s) I would like to charge this to is  
123456

The date(s) of service are (Please list each date)  
11/1/2020

Will you be paying this individual multiple times?  
No

Where was the individual when services were performed? (ex: Michigan, California, Germany)  
Michigan

Is this payment associated with a Procurement contract or agreement?  
No

Citizen status  
US citizen, Permanent resident, or Resident alien

The individual wants to be paid by  
Check

Attachments (1) Sort By: Name Date

TEST John Smith.pdf  
Tue 11/17/20 1:19 PM Malorie Lauzon  
View Delete

Drag and drop attachments here to upload.  
A maximum of 4 MB can be uploaded at once.

Read By (1)  
Malorie Lauzon Tue 11/17/20 1:18 PM

Feed (1)

Comment Update

ML Malorie Lauzon  
This is where any notes/conversations would take place.  
Tue 11/17/20 1:18 PM  
Comment Like

5. To approve the document, you can click I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions to open the approval page.

Current Workflow Step

Service Request Details  
Service Request 387791: PeoplePay Payment for Service - John Smith

Approval Step Details  
Step I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions.

Assigned To Malorie Lauzon  
The workflow will move forward once all approvers approve this step.  
At present, this step is at 0 of 1 approval vote.

Description Approval step 1

Approve Service Request  
Reject Service Request  
Re-send Notification

Requestor  
ML Malorie Lauzon malhall@umich.edu

6. From the approval page, approve or reject the payment. After you click **Approve Service Request** or **Reject Service Request**, you will be taken to a page to enter a comment.

Current Workflow Step

Approve Service Request

Comments

Save Cancel

**Note:** You do not need to enter a comment, unless you are rejecting the payment.

7. You should now be on a confirmation page that indicates that you have approved or denied this payment.

**Note:** If you denied payment, the SSC PeoplePay Team will update the request and re-send the ticket for your approval.

### Current Workflow Step

#### Service Request Details

Service Request  
387791: [PeoplePay Payment for Service - John Smith](#)

#### Approval Step Details

Step  
I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions.

Status  
✔ Approved Service Request on Tue 11/17/20 1:44 PM

Assigned To  
Custom Attribute - PeoplePay - Payment Approver 1

Description  
Approval step 1

#### History

**ML** [Malorie Lauzon](#)  
✔ Approved Service Request  
Approved this service request on the "I certify that this payment meets all required terms and qualifications and is in compliance with funding source conditions." step in the "PeoplePay Payment Approval" workflow.  
Tue 11/17/20 1:44 PM