University of Puget Sound Training Guides
Approve or Deny Transfer Request

Steps to Approve or Deny a Transfer Request when money has or has not been spent:

1. Find the transaction to approve or deny by one of three methods:
    a. Click the **hyperlink** in the approval email, or
    b. Click within the "**My Worklist**" page in the Financials & Annual Budget tile in myPugetSound, or
    c. Click the **Approve** button in the Transfer Request page
    d. If one does not seem to work, please try all three before contacting Office of Finance
2. Click the **Journal Lines** expand arrow on the GL Journal Approval page
3. Review the Journal Line **Chartfields**
4. Click the **Currency Details** Tab and review the Journal Line **Amounts**
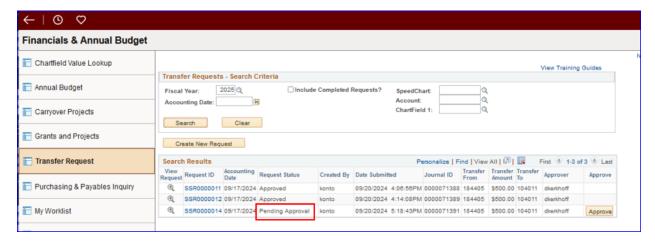5. Click the **Approve** button or **Add a Comment** and click the **Deny** button

Note: Approvals for Transfer Requests when money was spent via an Accounts Payable voucher will be handled manually.

Read further for more detailed information about each step.

Prerequisite

A Transfer Request must be Submitted to invoke the Approval Process for Self-Service Journals, i.e. the Transfer Request status is Pending Approval.

Find Transaction to Approve or Deny

If one of these three methods does not seem to work, please try all of them before contacting Office of Finance for assistance.

Method 1 - The Approver will receive an email with Subject line: *Approval is Requested for Journal ID "00000xxxxx"*
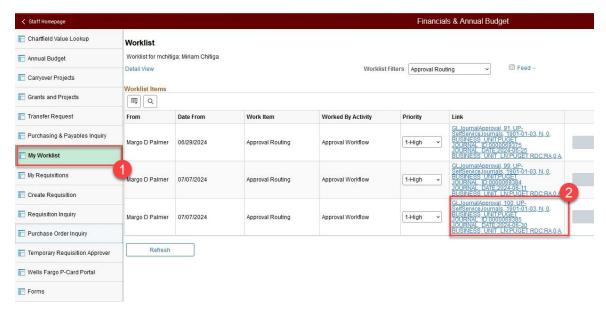
Open the email and click the link provided to navigate directly to the journal entry page to review and approve or deny the Self-Service Journal for the Transfer Request.

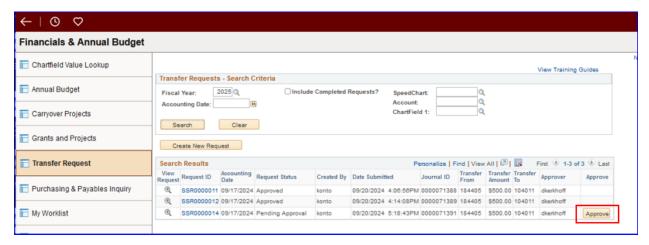**Method 2 -** The Approver monitors the worklist for Self-Service Journals

Navigate to the My Worklist page via the Financials & Annual Budget tile in myPugetSound

1. Click the **Financials & Annual Budget Tile** then click on **My Worklist**
2. Click the **Link** to open, review, and Approve or Deny the Self-Service Journal

Method 3 - The Approver can search the Transfer Request page for lines Pending Approval

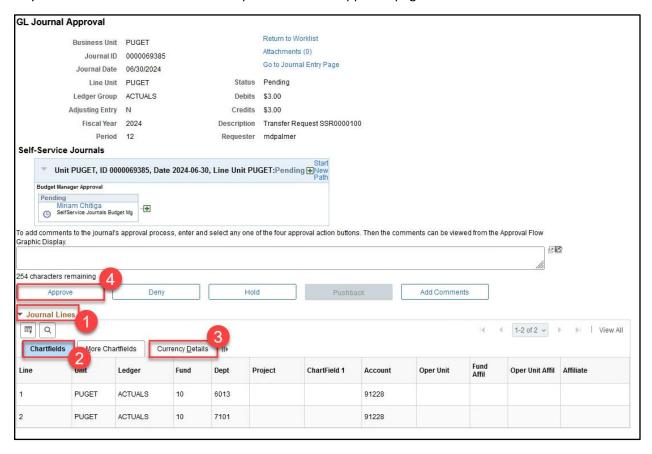Search the Transfer Request page via the Financials & Annual Budget tile in myPugetSound

1. Click the **Approve** button to open, review, and Approve or Deny the Self-Service Journal

Approve the Self-Service Journal

Any of the above three methods will open the Journal Approval page:

1. Click the **Journal Lines** expand arrow
2. Review the Journal Line **Chartfields**
3. Click the **Currency Details** Tab and review the Journal Line **Amounts**
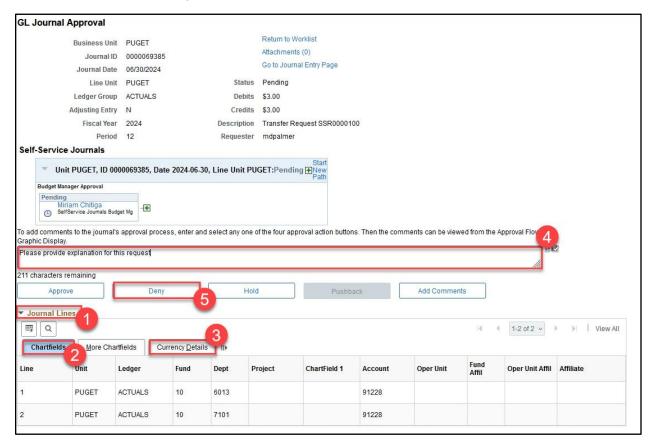4. Click the **Approve** button

1. Verify the **Status** has updated to **Approved**
2. Click the **Return to Worklist** List

The Requester will receive an email with the Subject: *Journal ID "00000xxxxx" Has Been "Approved"*

Deny the Self-Service Journal

Note: When a Journal is Denied it is no longer a viable transaction; **a new Transfer Request must be created and submitted to replace it with corrected information.**
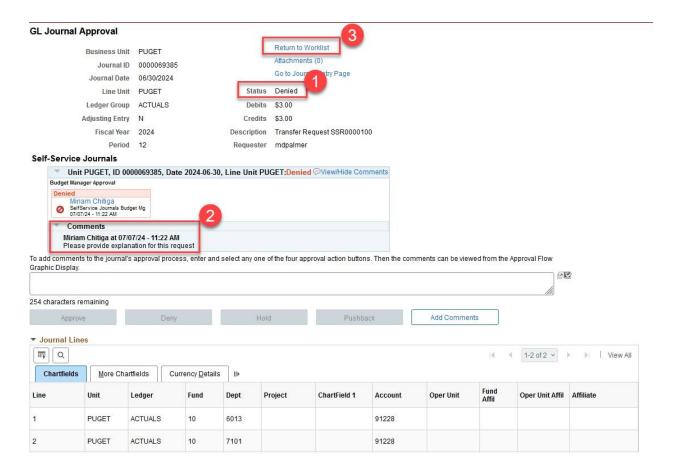

1. Click the **Journal Lines** expand arrow
2. Review the Journal Line **Chartfields**
3. Click the **Currency Details** Tab and review the Journal Line **Amounts**
4. Add a **Comment** to explain why the Journal is denied
5. Click the **Deny** button

1. Verify the **Status** has updated to **Denied**
2. Verify the added **Comment**
3. Click the **Return to Worklist** List

The Requester will receive an email with the Subject: *Journal ID "00000xxxxx" Has Been "Denied"*

Again, edits are not allowed to existing requests when going through the approval process. You will need to make sure the requester knows a new transfer request is required.

Tips and Tricks:

Request Statuses:
1. Pending Submission - can only be deleted by the Created By user
2. Submitted
3. Pending Approval
4. Approved
5. Denied
6. Completed
7. Canceled