Job Aid for Review Requests Transactions

Description

- This job aid is intended to guide you through the online process for searching and reviewing all PAF Transactions that have been initiated, approved, denied or are in a pending process. This can be done only by an approved Tufts submitter or approver.
- Marital Status, Life Events and Name Changes are reviewed under the menu of Monitor Approvals (see starting with step 5).
- Once an approval has been completed it can no longer be denied and another transaction would need to be processed to reverse or correct the transaction that was approved in error.

Key Steps/Activities to be performed

1. The Approved Submitter or Approver Logs into PeopleSoft and clicks on the review requests tile from their landing page.
Transactions can be searched by the Approval Process, Approver, Requester, Emplid, Name or within a specific date range.

The following fields are provided upon the search to which the administrator can view or access a transaction to inquiry or create additional tasks if necessary:

- **Employee ID** – Identifies the Employee ID
- **Employee Record #** - Identifies the employee record # to differentiate multiple jobs
- **Employee Last Name** – Employee Last Name
- **Employee First Name** - Employee First Name
- **Effective Date** – Effective Date of the request
- **Type of Transaction** – The Type of request
- **Date / Time Entered** – The Date the request was entered
- **Days Pending** – How many days the request has been pending
- **Submitters Name** – The name of the person who submitted the request
- **Submitter's Business Email Address** – Submitter’s Email Address
- **Workflow Status** – Status of the transaction (pending, approved etc...)
- **Pending With** – Where the request is currently with and a user can click the request to receive further details such as multiple approvers and who approved the request.
- **Notify Approvers** – Can be selected to notify approvers again if it’s still in a pending transaction and an email will be resent to the approvers.
- **MSS** – will take the user to the Monitor Approvals page if they have access in order to view Marital Status, Life Events and Name Changes.

In this example below we have searched by the last name of “Turner” and received a list back of all transactions with that last name with the following transaction fields:
3. Submitter/Approver can select a pending request still awaiting approval and trigger a reminder to the approvers if it hasn’t been processed.

4. Submitter/Approver can click on the pending approvals to review who the transaction is awaiting approval from along with other details surrounding the approval.
5. To review Name Changes / Marital Status Changes and Life Events requests Submitter/Approver will need to Navigate to the Monitor Approvals page under Enterprise Components

Navigation: Enterprise Components / Approvals / Approvals / Monitor Approvals.

In the Approval Process field after clicking the magnifying glass to the Search the Submitter/Approver can either choose the ‘Process ID’ type from the list or can type in the Process ID at the top of the Search page
6. In this example where we have selected Approval Process = “Name Change” a list of requests for Name Changes will be returned where the Submitter/Approver can check the approval status.

7. Select a transaction by using the hyperlink and the system will return additional data to review whether the request is in pending / denied or approved status and who approved the transaction or who it is awaiting approval from.
## Monitor Approvals

### Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny options below. This action will apply to all tasks pending for the approver selected within the context of the transaction.

- Approve
- Deny
- Rebsubmission
- Reassign

### Name Change Approval Chain

- Employee Name Change: Approved
- Name Change Approval Chain: Approved

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**Note:**

- This is a screenshot of the Monitor Approvals page from the review requests job aid. The page allows monitoring and managing approval processes, including administrative approvals and name change approvals. It provides options to approve, deny, rebsubmit, or reassign tasks pending for the approver selected within the context of the transaction.