ACADEMIC AFFAIRS
FISCAL SHARED SERVICE CENTER

Smartsheet: FSS PRF Process

Requestors

1. To make a new purchase/processing request from Fiscal Shared Services, **complete the PRF Smartsheet form**, located here (please bookmark this link for future use):
    a. https://app.smartsheet.com/b/form/ef79fbd1d45e45f1918b52ce613e980f
    b. The PRF categories cover our most frequent request types. If you don't see exactly what you are looking for, select the closest sounding category, or select Other and explain your request in the following sections.

2. The completed form **routes to your approver** as established by your department.
    a. If no approvals are required for your unit, the request routes directly to the FSSC for processing.

3. Once approved, the **request moves to the FSSC** task queue for review.

4. You will receive an **email confirmation** that your request has been approved and will be processed shortly.
    a. New requests are generally processed in the order they were received.
    b. If your request is denied, the request is eliminated from the workflow.

5. If you checked the box "Notify me when Complete" on the PRF, you will receive an automatic message from Smartsheet once our team has marked the task as complete.
    a. **IMPORTANT**: When FSS marks a task as Complete, this does not necessarily mean that the payment has been processed. This simply means that FSS has finished working on this task. Depending on the request type, there may still be additional steps performed by other departments before the payment is processed.

Summary

1. Go to and fill out PRF.
2. Request is automatically routed to department approver (if any).
3. Once approved, request is routed to the FSSC for review.
4. You receive email confirmation that your request is approved and in progress.
5. [If you checked "Notify me when Complete"] You receive email confirmation that task is completed by FSS.

Purchase Request Form Fields

Below is a list of all of the fields in the PRF. The PRF is dynamic; some of these fields will only appear based on other selections on the form. Depending on which category you select, you will see relevant information for that request type.

1. **Request Name**
    a. Enter a short description of the request. For example: "Bobby Silva's travel to ABC Conference" or "New printer for reception". This just identify and distinguish this request on our long list of ongoing tasks.
2. **Your Name**
    a. If you are submitting the PRF on behalf of someone else, you can enter their name and email address. You will have an opportunity to receive a copy of the form you filled out by checking the last box at the bottom of the form.
3. **Your Email**
    a. This email address is used for notifications regarding approval or denial of the request.
4. **Unit**
    a. Select or type in your unit's name. Note that some units are listed first by their college/school (e.g. ASM: Accounting). Selecting the correct unit will ensure your request is routed to the appropriate approvers and Fiscal Agent. If you don't see your unit listed, please reach out to your Fiscal Agent.
5. **Category**
    a. The most common types of requests are listed here. If your request doesn't fall under one of these categories, select **Other** and describe your request in the boxes below.
6. **Does the Vendor Accept Credit Card Payment?**
    a. This field only appears if you select "Purchase goods/services" and will make sure your request gets routed appropriately to a PCard Payment or a Purchase Order.
7. **Vendor/Payee Name**
    a. Enter the full name of the person or business being paid. If we cannot find them in UNM's systems, we will need to add them as a new vendor.
8. **Vendor/Payee Email**
    a. If the vendor is a large online retailer (e.g. Amazon, Walmart, etc.) you can enter N/A in this field. Otherwise, please provide the email in case we need to set up a new vendor in UNM's systems.
9. **Business Purpose**
    a. Your business purpose **must** explain what the expense is, who it's for, when and where any relevant events took place, and, most importantly, the "why" (i.e. why does this benefit UNM). An external party with no knowledge of your department/processes should be able to read your business purpose and fully understand the nature of the expense and the benefit to the University.
10. **Total Amount of Request**
    a. Enter a number only. If your department has a conditional approver, this will route to them if it exceeds the threshold set by your department.
11. **Index**
    a. If you don't know the exact index number, please provide a description of the index. For example, "My RAC index".
12. **Other Additional Information**
    a. If there are any special instructions for the payment, such as "wire transfer" or "pay on 10/01/24", enter that information here.
13. **File Upload**
    a. The description in this section lists the typical documents we need for different types of common requests. Every circumstance is different though, so we may reach out if additional documents are needed.

14. **Notify me when Complete**
    a. Check this box to receive a notification when FSS marks the task as Completed.
    b. When FSS marks a task as Completed, this only means that FSS has finished working on the task. There may still be other steps required by other departments before the payment is processed.
15. **Confirmation of Available Funds**
    a. This field only appears for certain units.
    b. Type in any statement confirming that the index you provided has sufficient funds for the request.
16. **Send me a copy of my responses**
    a. If you check this box, a text field will appear and allow you to send a copy of the responses to the email you indicate.