

# Request for Payment Form

***This documentation is for the Request for Payment Form – located at***

<https://newforms.vsc.edu/RequestforPayment>

***There are 6 main pages to this form:***

***AP – Requester Info*** (For information about you and your supervisors for approval)

***Payment Details*** (Includes several sections – Payment Type, Payment Details, Grants Expense, Faculty Professional Development Expense, Vendor Information, and GL codes)

***Review Totals Charged*** (table with the amount and each GL code assigned an expense)

***Error Page*** (Conditional - if total amount billed to GL codes does not match invoice)

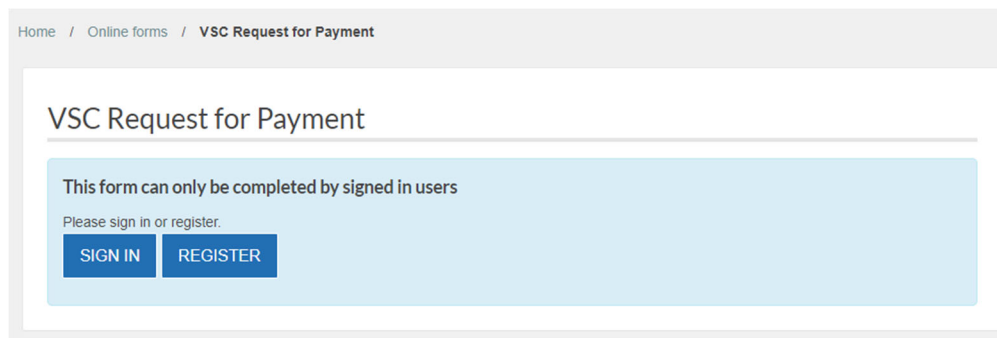
***File Uploads*** (attach invoice and W-9 if applicable)

***AP – Requester Signature*** (digital signature acknowledgement that funds were for business purposes)

***The form has built-in error checking to verify if you are filling it out properly such as required fields are complete. Each page will show an error if you do not fill out required information or if you enter something incorrectly. The Review Totals Page will also total the amount billed to each GL code and give an error if it does not match the invoice total.***

## Filling out the Request for Payment Form

Following the link to the form should bring you to this page:

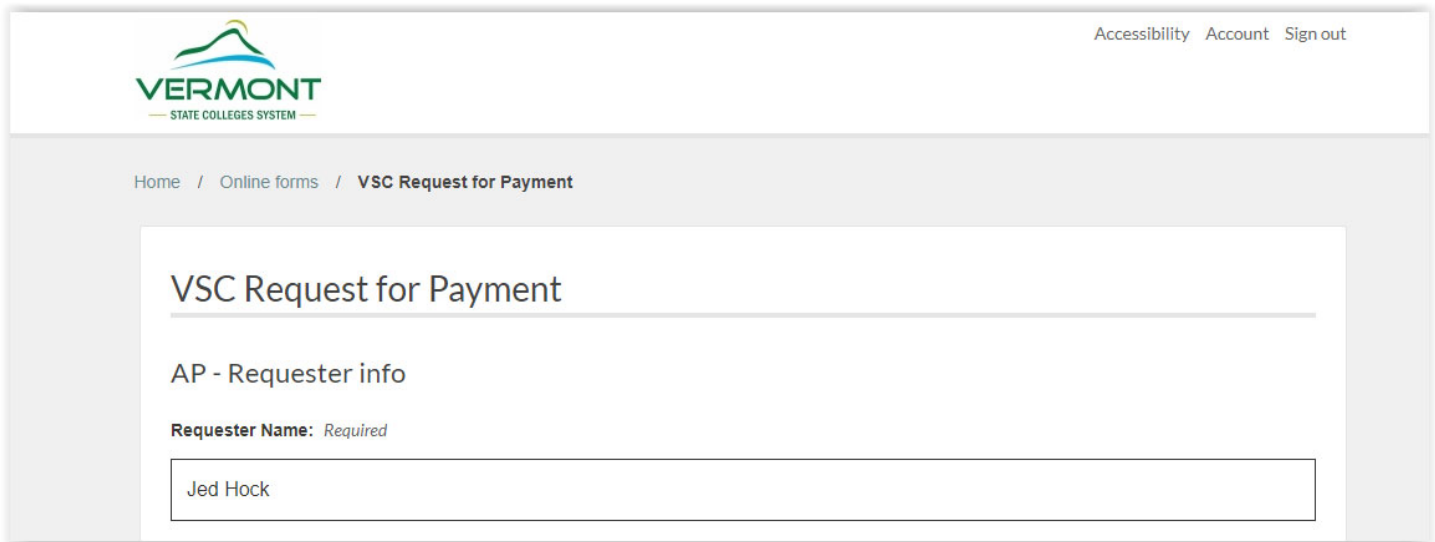


The screenshot shows a web browser window with the following content:

- Breadcrumb: Home / Online forms / VSC Request for Payment
- Page Title: VSC Request for Payment
- Message: This form can only be completed by signed in users
- Text: Please sign in or register.
- Buttons: SIGN IN and REGISTER

From here please click “Sign In” which will bring you to our organization’s sign in page and then sign in using the same credentials you use for access the portal and most other VSC resources.

## Form Page 1 – AP – Request Info



VERMONT  
STATE COLLEGES SYSTEM

Accessibility Account Sign out

Home / Online forms / VSC Request for Payment

### VSC Request for Payment

AP - Requester info

**Requester Name:** *Required*

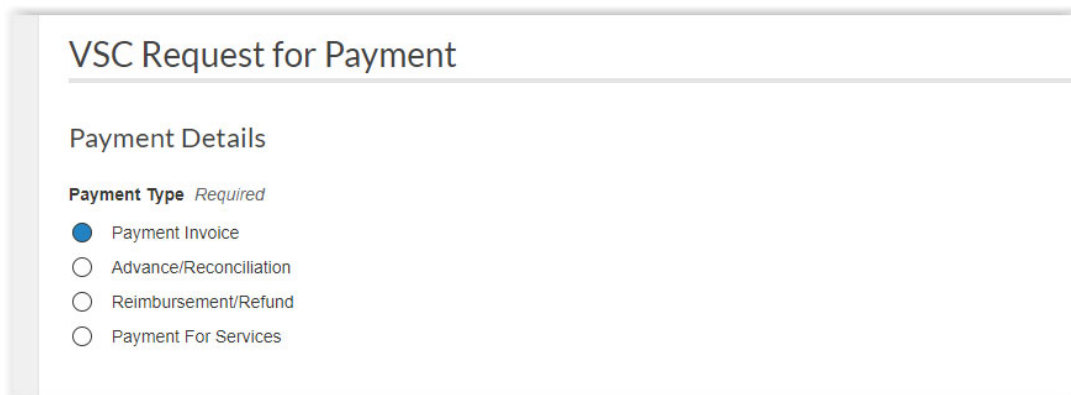
Jed Hock

The system should auto populate your full name, Colleague ID#, User ID, Email Address. You are required to enter a phone number that is best to reach you at. Please enter which Department you work for. From the VSC Organization drop down please choose which is your organization. If your org has more than one campus, please make sure to choose which one from the new question presented. **Please enter your Supervisor's info (please spell name correctly)**, then choose the Divisional Dean from the drop-down list. The divisional dean, Dean of Admin, and President will change based upon what organization you have chosen.

Once you have filled out that page you can click "Next".

## Form Page 2 – Payment Details

This brings us to the Payment Details page. The first question is Payment Type –



### VSC Request for Payment

Payment Details

**Payment Type:** *Required*

Payment Invoice

Advance/Reconciliation

Reimbursement/Refund

Payment For Services

Please choose the applicable payment type – some of these will spawn a follow-up section (such as Payment for Services).

After selecting payment type, please enter the Payment Details. Invoice Number, Invoice Date (a calendar view should pop-up and you can select a date), Due Date (same behavior as Invoice Date), and the Invoice Amount. The Invoice dollar amount **REQUIRES** dollars and cents even if it's .00

**Payment Details**

**Invoice Number** *Required*

**Invoice Date** *Required*

**Due Date** *Required*

**Invoice Amount** *Required*

If this is a Grants Expenditure please click “Yes” – which will then create a new section to complete related to your grant, if not then leave it set to “No”. See last page for guidance on “Yes” on Grant Expenditure.

**Grants**

**Is this a Grant Expenditure?** *Required*

Yes

No

If this is a Faculty Professional Development Expense please click “Yes” – which requires uploading a file approving this expense, if not then leave it set to “No.”

**Faculty Professional Development**

**Is this a Faculty Professional Development Expense?** *Required*

Yes

No

The following section is then the vendor information. This is where you include the Vendor Name or Vendor ID (preferable if known), Payable To, Account or Customer Number, Address for Payment, Exceptions Only (Physical Checks), and Comments or Description of Purchase.

Vendor Information

**Vendor/ID#** *Required*

45678

**Payable To** *Required*

Jed's Test

**Account/Customer #**

456789

Optional, please include if available. ie - Phone or Power Bill

**Address**

575 Stonecutters Way

Checks will be mailed to the address on file unless there's an exception -

**Exceptions Only**

Physical Check

If you require a check in hand, please mark this box and the check will be sent directly to your college to the attention of the Mailroom

**Comments/Description** *Required*

bought things

Provide a detailed description of the BUSINESS purpose of the goods or services purchased or reimbursed on this request for payment form (supporting documentation must be attached)

Once you have completed that section you will then be asked to enter GL Codes / Project Codes / Amounts.

This is where you enter the GL code(s) you want the expense billed to. Please enter a GL code, Project code (only if you have one) and the Amount. If you need a Second GL code to bill to please choose "Yes" from the drop down. A new GL code area will be created called Second GL. This action is repeatable for up to 15 GL codes. Dollar amounts here will also need you to enter dollars and cents (1.00).

GL Codes / Project Codes / Amounts

First GL

**GL Code** *Required*

060-60000-60000-60000-000

e.g. 060-60000-60000-60000-000 you must include the dashes and full GL code

**Project Code**

**Amount** *Required*

900.00

**Do you require a Second GL Code to bill to?** *Required*

No

Once you've completed the GL Codes and Amounts you can click "Next".

### **Form Page 3 – Review Totals Charged**

This brings us to the Review Totals Charged page. At the top you will immediately see the amount you put in as the invoice amount for your form. In the chart below you will see a break down of how much you charged to each GL code. **This form checks the invoice total against your GL total, and if they do not match, it will tell you the difference beneath the chart.** If you over-billed the GL codes then the difference will be a negative amount, if you under-billed the GL codes then the difference will be a positive amount.

The next two examples show how to overcome errors if your amounts (invoice amount versus GL coding amount) do not match.



**Form Page 4 – Error Page (CONDITIONAL)**

If you did not go back and fix your mistakes as noted on the Review Totals Charged, after clicking “NEXT” you will get the Payment Request Error page.

Payment Request Error

You have made a mistake inputting values on this form.

Invoice Amount - 1000.00

Total GL Amount Charged - \$900.00

There is a Difference of - \$100.00

PREVIOUS

It will again tell you that you did not fill the form out properly and therefore cannot finish the form. You can now only use “Previous” to move back pages. Please return to the Review Totals Charged page, check for your mistake, then use “Previous” to return to the Payment Details page and either fix your GL code amount or total invoice amount.

Once you have resolved your mistake(s) the Payment Request Error page will not appear again.

**Form Page 5 – File Uploads**

This is the page where you will upload a copy of your invoice, receipt, or other required documentation. To upload you can either drag and drop your file in the window or click the button to Upload and select the file from the File Explorer.

File Uploads

Please attach corresponding invoice *Required*

DROP FILES HERE OR CLICK TO UPLOAD.

Please perform the same action for a W-9 if applicable.

Click “Next”

## **Form Page 6 – Requester Signature**

This is our digital signature page where your submission of this form acknowledges that the funds spent are for business purposes, and in the case of an advance, all documentation is due within 10 days.

The fields on this page should auto populate for you, click “Next”

## **REVIEW SUPPLIED DETAILS**

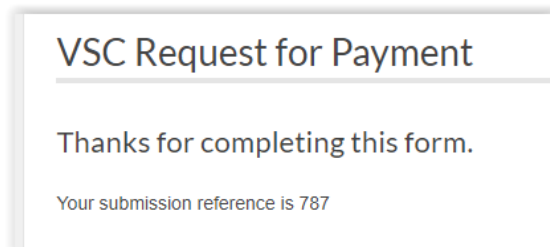
This is a standard page on all forms. You can ignore this page as the earlier Error Checking and Review Pages replace it.

Please scroll to the bottom and click “SUBMIT FORM”. This will then send your form in to Perceptive Content for approval by your supervisor. You will receive a copy of your submitted form in your [Outlook](#) inbox with all the details from the “Review Supplied Details” page and a copy of the form that submitted to Perceptive Content.

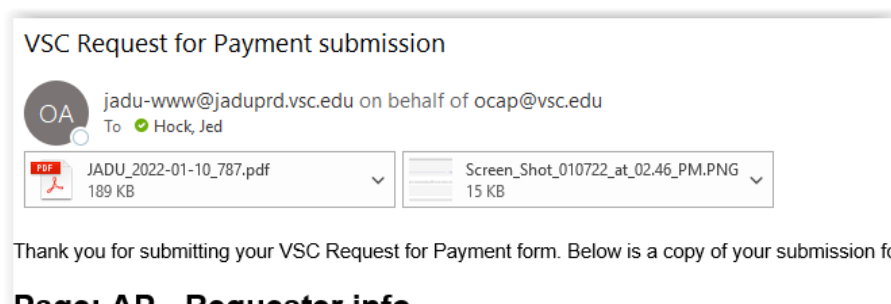
Your submission is complete.

## **Additional Information**

The system will give you your reference number for that form submission.



You will also receive that on the email you submitted. You can find it on the attachment that is titled “JADU\_(today’s date)\_(form reference #)”.



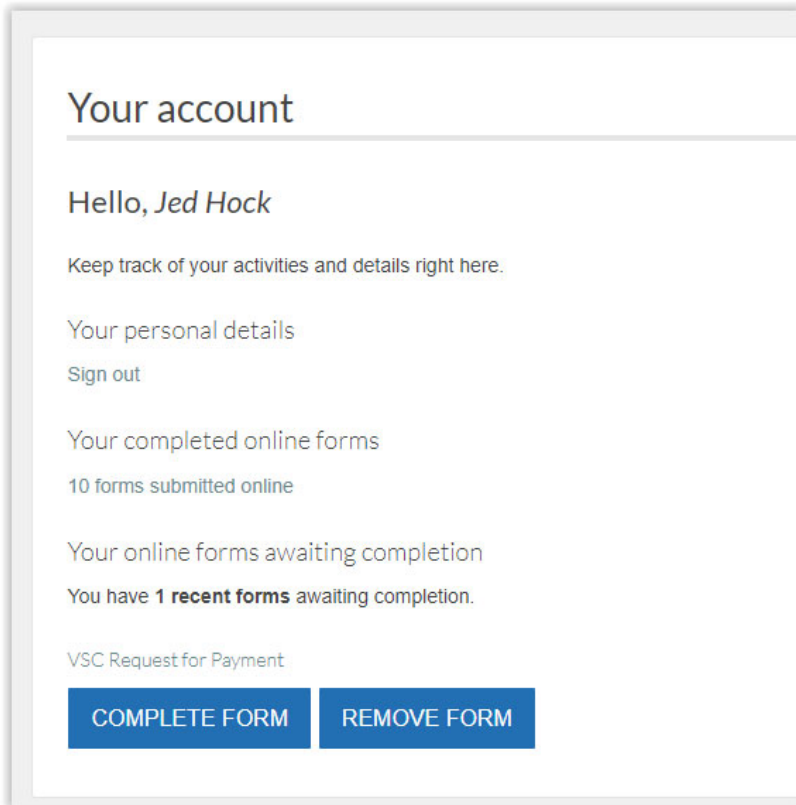
This number can also be used to help track a Request for Payment.

JADU also provides the ability to view your submitted forms as well as any forms that you started that you didn’t complete. You can see the last 10 submitted forms. From the Account menu at the top after you’ve signed in – Click on Account

[Accessibility](#) [Account](#) [Sign out](#)



You will then be at this page –



**Your account**

Hello, *Jed Hock*

Keep track of your activities and details right here.

Your personal details  
Sign out

Your completed online forms  
10 forms submitted online

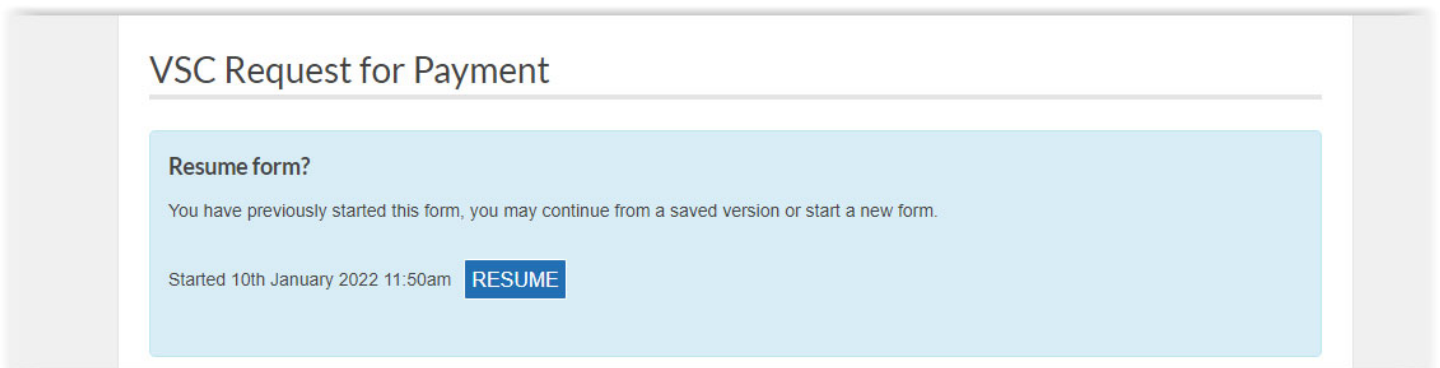
Your online forms awaiting completion  
You have **1 recent forms** awaiting completion.

VSC Request for Payment

[COMPLETE FORM](#) [REMOVE FORM](#)

Here you can see your last 10 forms submitted online. I can also see that I have a partially completed Request for Payment form. From here I could either click Complete to return to this form or Remove it to delete it.

It will also present this partially completed form to you and ask if you want to resume it if you time out or for some reason didn't complete the form. It would look like this:



**VSC Request for Payment**

**Resume form?**

You have previously started this form, you may continue from a saved version or start a new form.

Started 10th January 2022 11:50am [RESUME](#)

From here you could click Resume and return to your incomplete form.

Below are the questions if your payment request is a Grant Expenditure.

## Grants

**Is this a Grant Expenditure?** *Required*

- Yes  
 No

NOTE: To determine whether this is a grant, look at the third number in the GL code: xx2-xxxxx-xxxxx-xxxxx-xxx. If this number is a 2, these are restricted funds and most likely a grant.

**Grant Name** *Required*

**Grant Dollar Amount** *Required*

**Is this an allowable expenditure to charge to this grant?** *Required*

- Yes  
 No

**Is this a Federal Grant purchase of \$25,000 or more?** *Required*

- Yes  
 No

If "Yes," please upload a completed copy of the Competitive Bid Form (found on the portal under VSC Forms). If a competitive bidding process was not followed, upload an approved copy of the Non-Competitive Bid Request Form (found on the portal under VSC Forms.)

The last question is new to the form. If your grant expenditure amount is \$25,000.00 or more, you will have an extra and separate step, where you need to submit the Procurement Form.