OFFICE OF THE CONTROLLER

Tips and Tricks:
Accessing Approvals and Understanding Workflow

September 2025

UNIVERSITY OF
South Carolina

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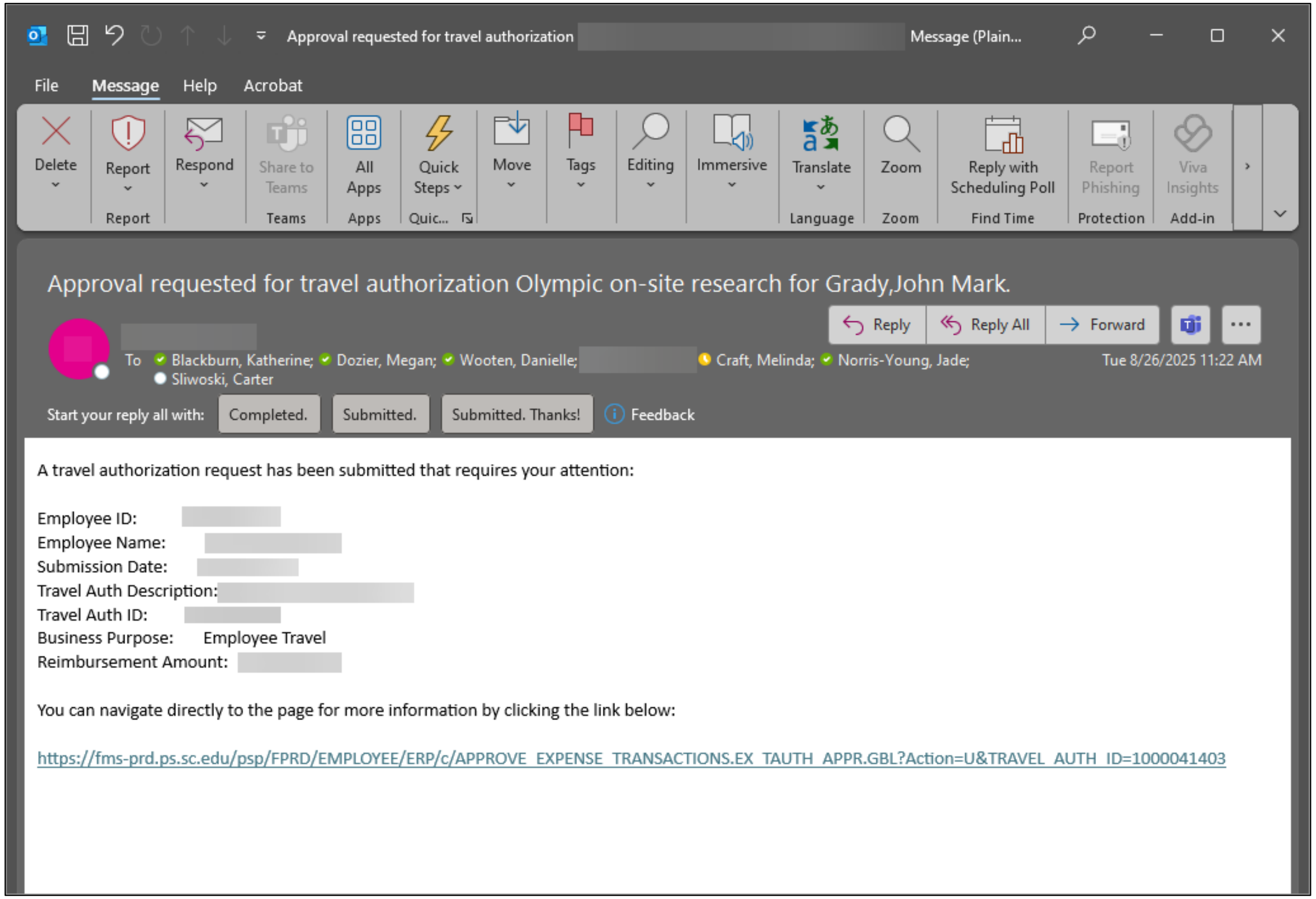

There are two ways to access approvals:

- Access Approvals via the **Email Notification**
- Access Approvals via the **Worklist** or **Notifications** in PeopleSoft Finance.

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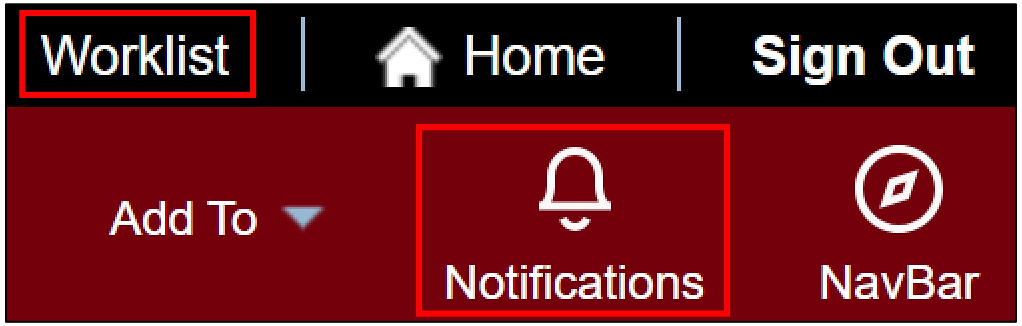
Accessing Approvals in PeopleSoft

After logging in to PeopleSoft Finance:



1. Click the **Notification Bell or Worklist** link in the top right corner.
    - In the Notifications, Look for **“Your Approval is required”** or **“Certify Expense”**
    - In the Worklist, click the link.

2. Use the navigation:
    - **Main Menu > USC Finance eForms > Approvals**

Pro-Tip: Always double-check which eForm/Report you’re opening!

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Travel Authorizations and TRVs
Student and Non-Employee

- Once the correct eForm approval page is accessed, review and verify the documentation attached to the eForm.

Travel Authorizations (TAs)	Travel Reimbursement Vouchers (TRVs)
• Default Account • Destination • Dates • Name/Names • Estimated Expenses • Review chart field in the accounting details is correct. • Attachment	• Name • Address • Dates of Travel and Expenses Correspond. • Meal Matrix Reference – Time of Departure/Return for per diem. • Travel Checklist – Attach paid receipts. • Review chart field in the accounting details is correct.

- If the information is correct, click the Approve button.

- If the eForm needs to be corrected, add a comment and click the Recycle button.

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Expense Report

- If there are multiple expense reports pending your approval, please note the expense report number after the Certify Expense.

- Review and verify the documentation attached the expense report.
  - Meal Matrix Reference – Time of Departure/Return for per diem.
  - Travel Checklist – Attach paid receipts.
  - Review chart field in the accounting details is correct.

- If the Expense Report is Correct, click Approve.

- If the Expense Report needs Correction, add a Comment and click the Send Back button.

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Expense Report Status

Status	Status Description
Pending Status	not submitted for approval. The expense report can be modified and deleted.
Submitted for Approval	the expense report is submitted, waiting for approval.
In Process	the expense report is in approval workflow.
Approved	approval for the expense report is complete and waiting on processing.
Paid	the expense report is processed and complete.

Note: Once in a "Paid" status, the transaction is posted to the General Ledger overnight. Expenses are posted to your budget when the expense report is paid.**

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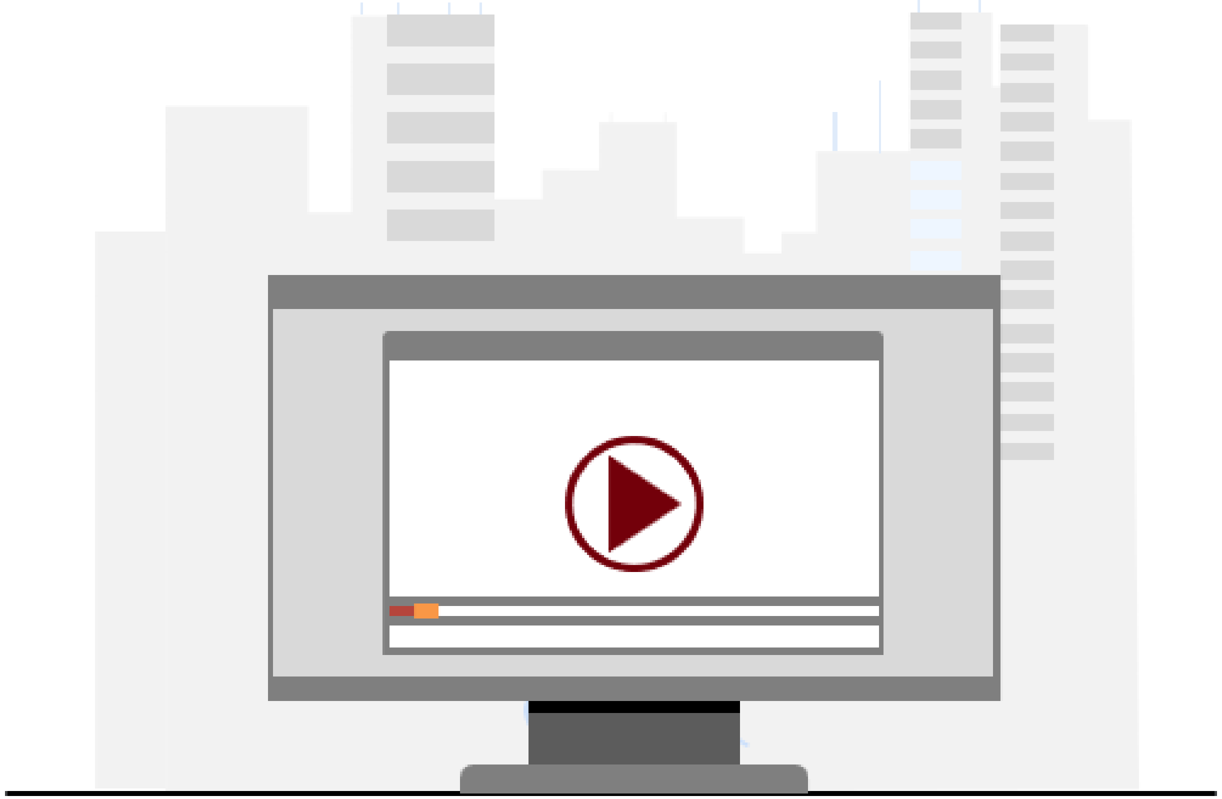

Demonstration

- How to approve a TA/TRV and Expense Report

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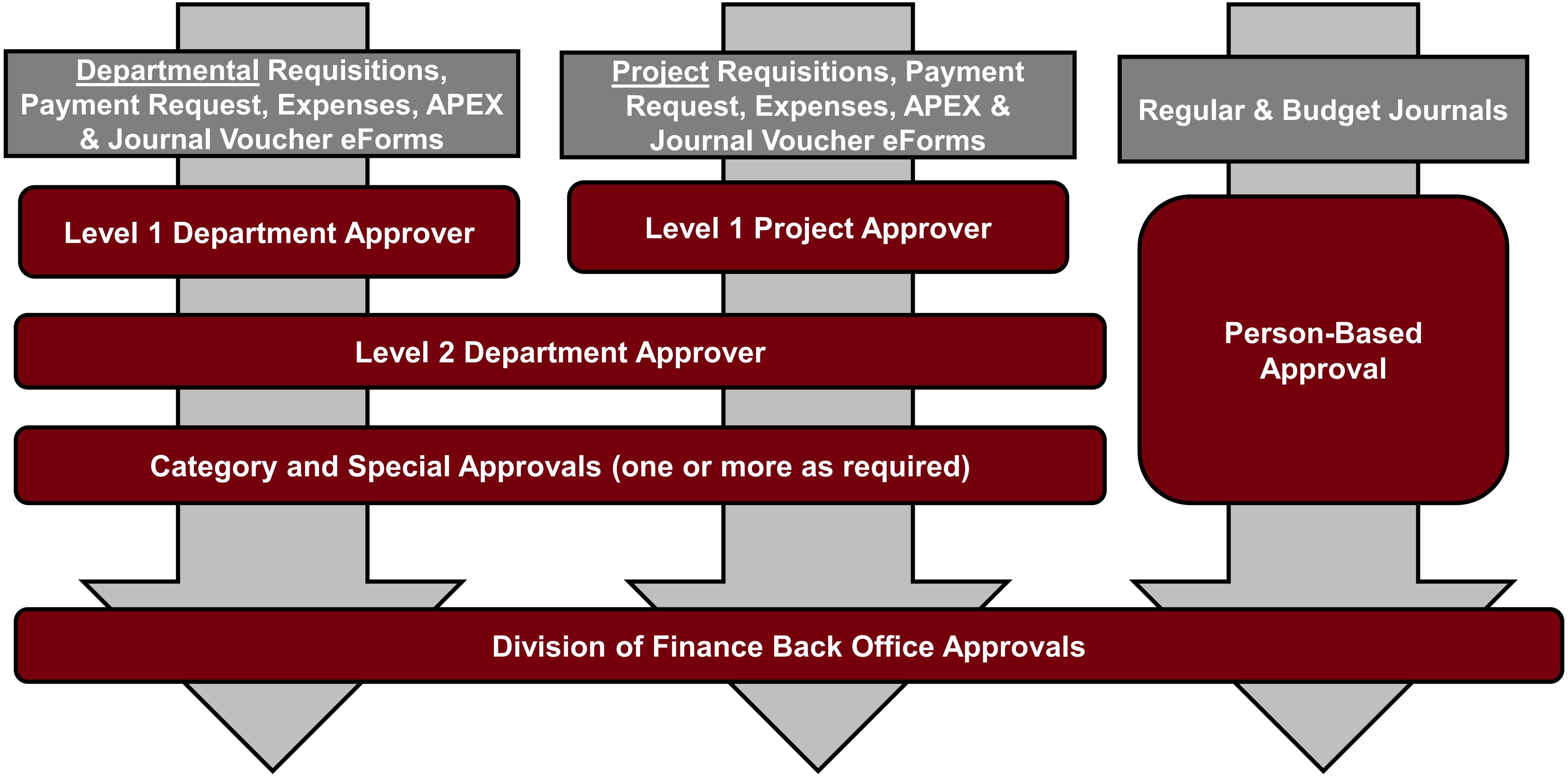
Transaction Corrections

PeopleSoft Finance Approval Workflow Levels

***Note:** Employee expense reimbursements require employee approval prior to the levels shown below



JE Approval Status

JEs follow a different approval workflow than all other PeopleSoft transactions.

JE approvers are assigned at the specific user ID level, unlike all other transactions which are assigned based on the department/project that is being used for the entry.

Each JE will contain a department level approver and a Controller's Office level approver.

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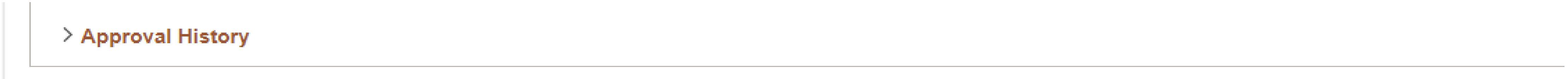
JE Approval Statuses

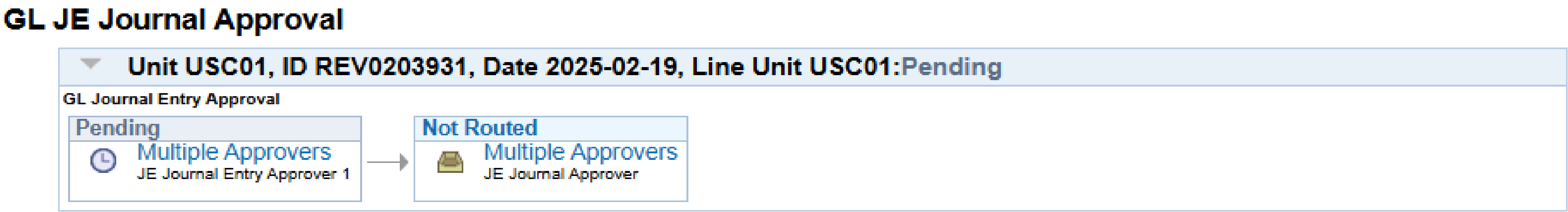
No Status

The JE has not yet been submitted for approval. Be sure both the Journal Status and Budget Status are both “V” and select the Submit button on the approval tab of the entry to start the workflow.



Pending for Level 1

The JE is complete and has been submitted but not yet approved at the departmental level. Click on “Multiple Approvers” hyperlink under the word Pending and reach out to those users listed to approve step one of the entry. Entries in this status can still be changed if needed but will need to be resubmitted after the changes are made.

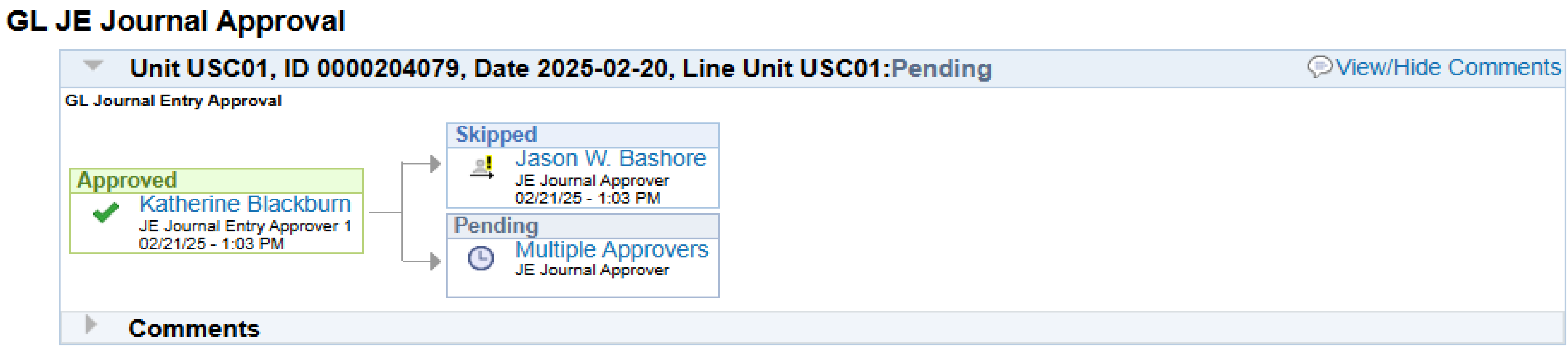


JE Approval Statuses

Pending for Level 2

The JE has been submitted and approved at the departmental level and is awaiting approval from the Controller's Office. Due to the volume of JEs being submitted in the system, please wait at least seven to ten days before reaching out on the approval status.

Notice this entry contains a "Skipped" section. This shows that the JE creator is also listed as an approver but is being skipped due to them submitting the JE. Entries in this status can still be changed if needed but will need to be resubmitted after the changes are made.

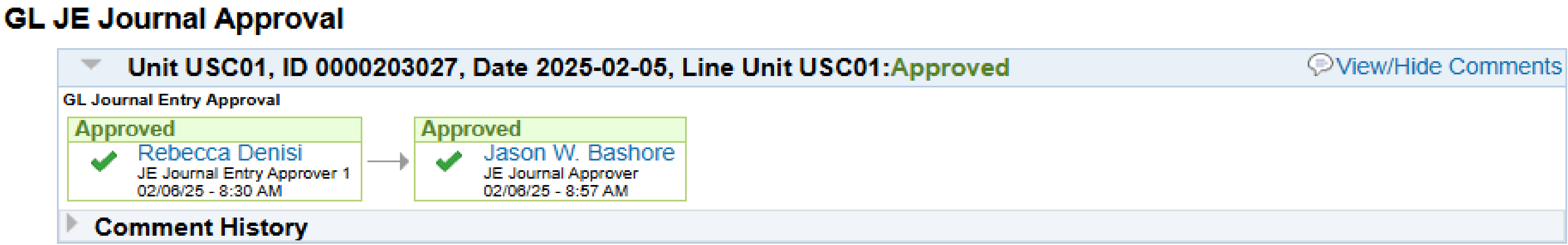


JE Approval Statuses

<u>**Approved at Both Level 1 and 2**</u>

JEs approved at both levels have completely made it through the workflow process and are posted to the General Ledger. No changes can be made to these entries. You should be able to see them and their balances in Peoplesoft when running queries and inquiries.

Remember, the entries will not show up in the Finance Intranet until the day following the last approval.



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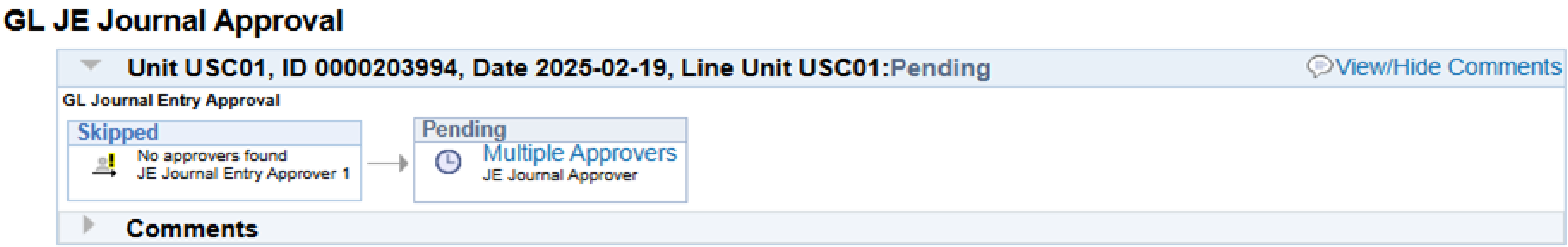
JE Approval Statuses

<u>Skipped at Level 1</u>

If you notice a “Skipped” message in level one as seen below, the system is letting you know that the user submitting the entry does not have any approvers assigned.

Reach out to the General Ledger (GL) team at genacctg@mailbox.sc.edu and they will assist you in getting approvers set up.



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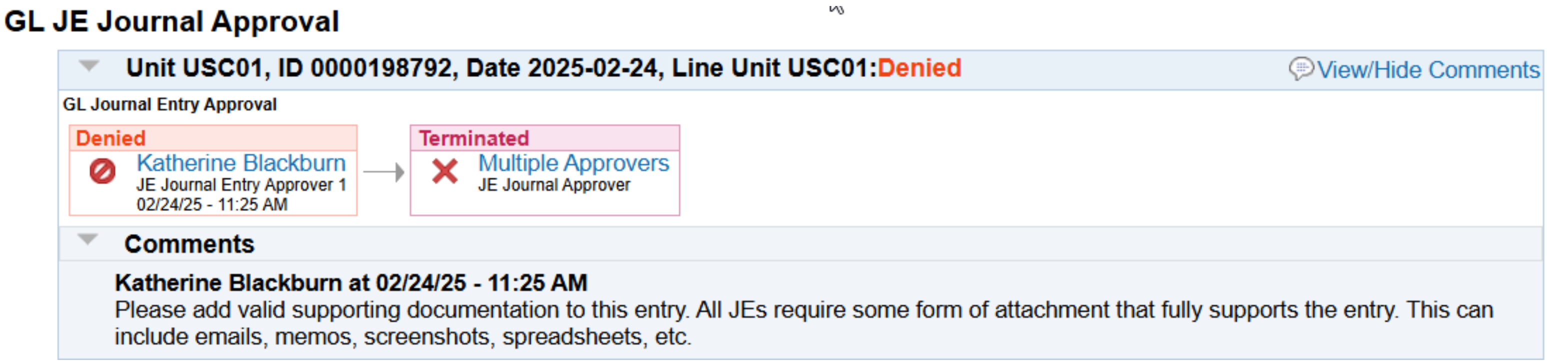
JE Approval Statuses

Denied at Level 1 or 2

JEs can be denied at both level one and level two. Clicking on the comment section will allow the user to see the reason the JE was denied. If a JE is denied, it still can be corrected if needed.

Just remember that after the correction is made, the JE will need to be edited again and submitted to restart the approval workflow process. If the JE was denied and does not need to be corrected, please reach out to the GL team for assistance deleting the entry.



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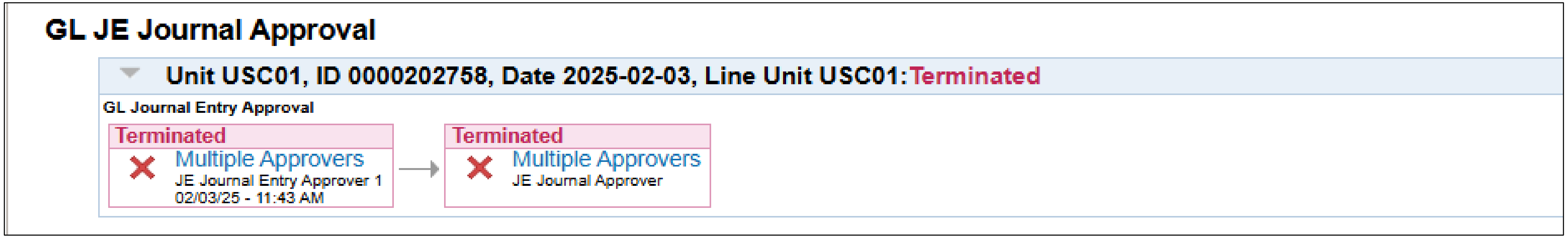
JE Approval Statuses

<u>Terminated at Level 1 or 2</u>

If a JE is adjusted and edited after it has been submitted for approval, it may fall to a Terminated status. If this happens, correct the entry as needed and then re-edit it.

Once the entry is back to Valid, use the Submit button on the approval tab of the JE to restart the approval workflow.



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JE Approval Statuses

Status	Descriptions
No Status	The JE hasn't been submitted yet. Both Journal and Budget must be "V" before hitting submit.
Pending for Level 1	The JE has been submitted but waiting on departmental approval; it is still editable, but changes mean you'll need to resubmit.
Pending for Level 2	The JE has been approved at the departmental level and is awaiting Controller's Office approval; it can be edited if necessary but must be resubmitted after changes.
Approved at Both Levels	The JE has been fully approved and posted to the General Ledger; it can no longer be edited and will appear in PeopleSoft immediately and on the Finance Intranet the following day.
Skipped at Level 1	The JE has skipped departmental approval because the creator is also listed as an approver or has no approvers assigned; the GL team must be contacted to resolve this.
Denied (Level 1 or 2)	The JE has been denied at either the departmental or Controller's Office level, and corrections must be made and resubmitted, or the GL team contacted for deletion if no correction is needed.
Terminated (Level 1 or 2)	The JE has been edited after submission, causing the workflow to terminate, and must be corrected, validated, and resubmitted to restart the process.

Supplier Portal

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Approval Workflow

- All new **Supplier Registrations will be approved first at the Department level** and then a final approval made at the Supplier Team level.

- Departments are responsible for **denying** the registration if they are not familiar with the supplier or do not intend to do business with the supplier.

- Departments will not request more information, **<u>only</u>** the Supplier Team will Request More Information.

- All new **User ID Requests will be approved by the Supplier Team only.** These are current USC suppliers that need access to their profile on the self-service portal to make changes to the information already in the system.

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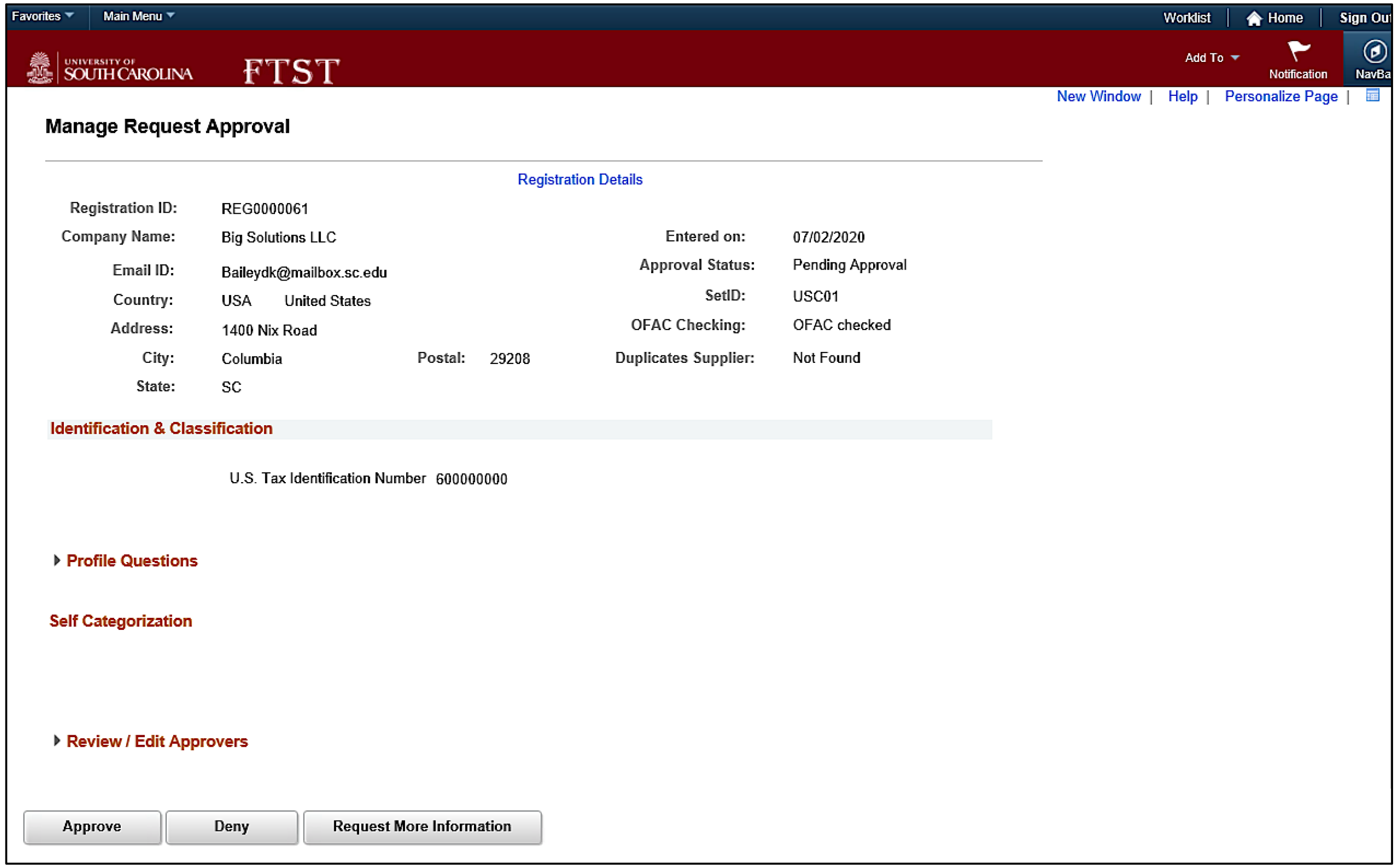
Supplier Approval: Department

Navigation: Main Menu > Worklist or Click the link in the email

- Cannot access if logged into HCM.
- Can do registration status check here as well.

Use the **Manage Request Approval** page to manage approvals for registration of new suppliers.



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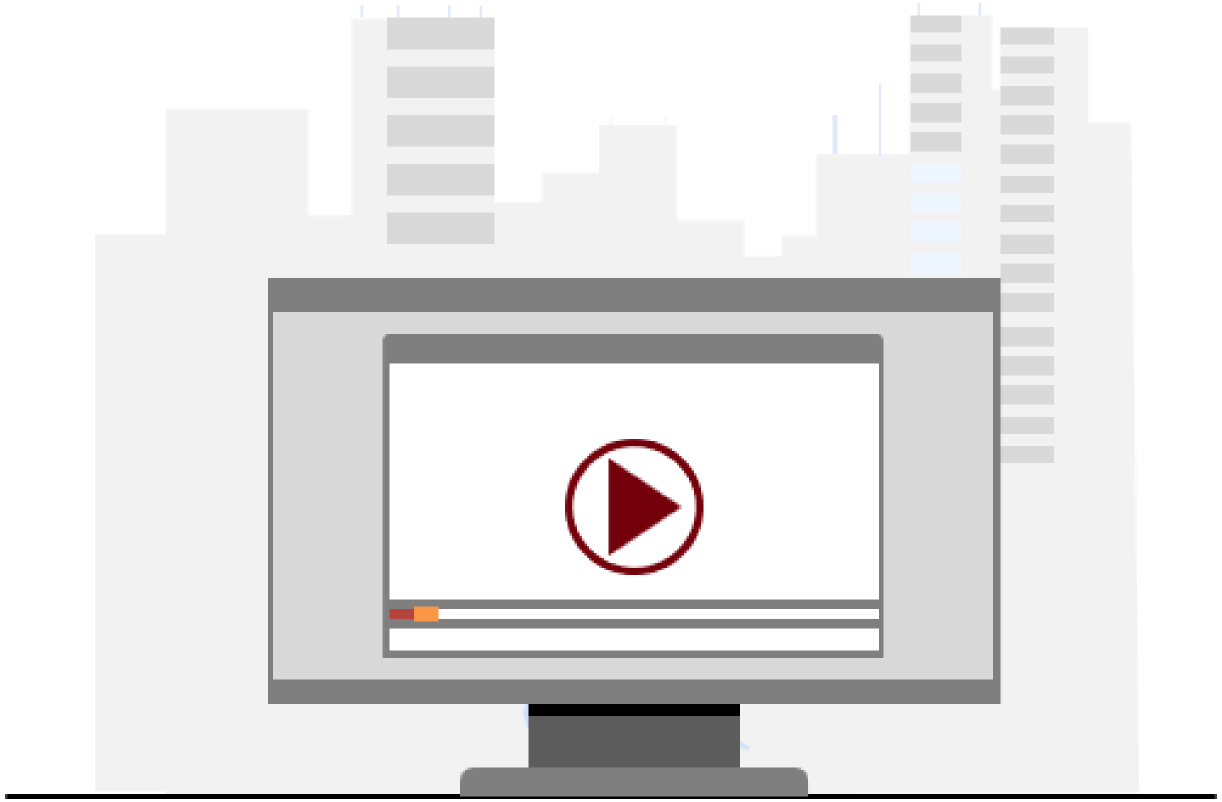

Demonstration

- How to approve a Supplier

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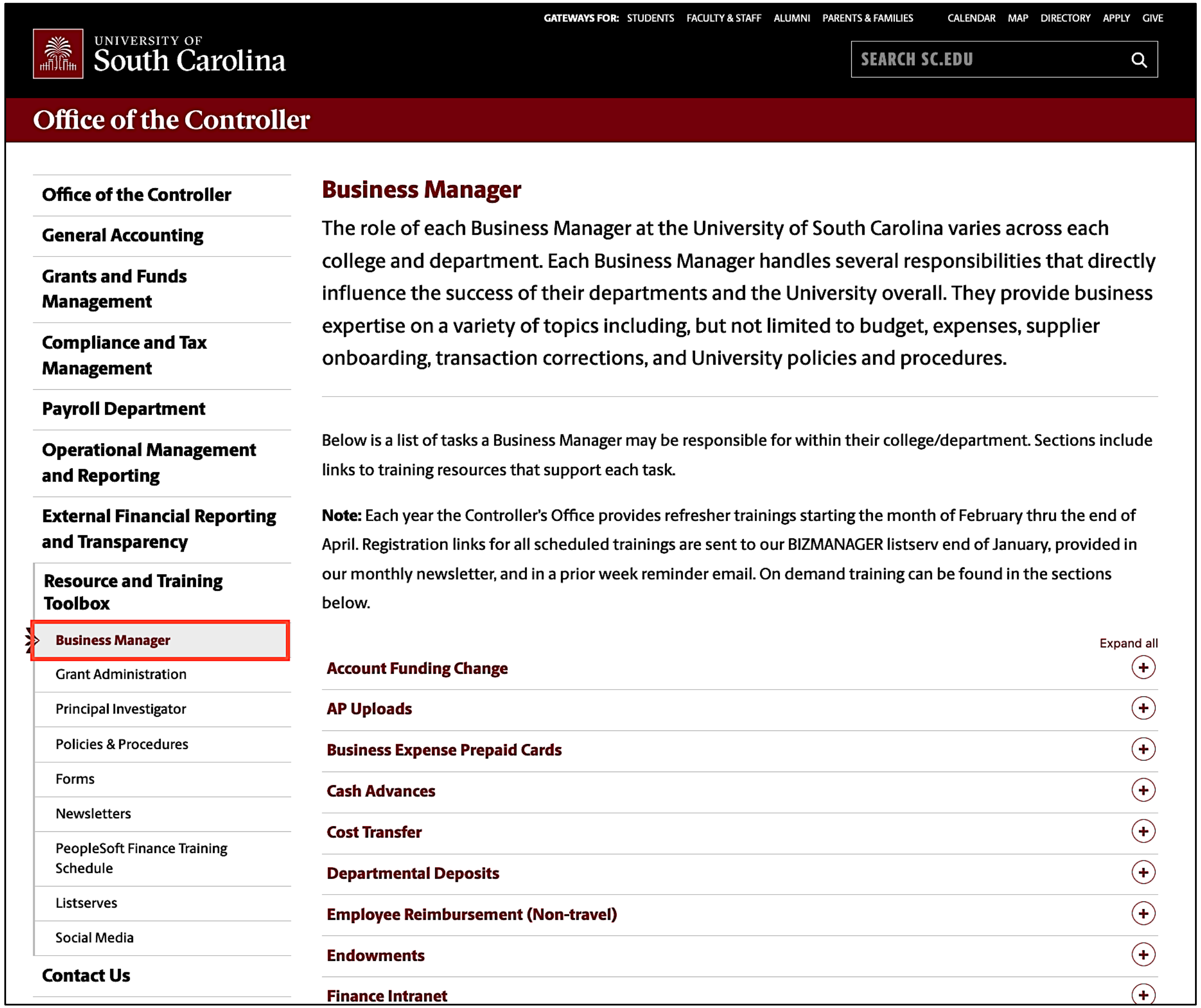
Resources & Contacts



Where to Find the Resources

For training resources, visit our Business Manager page in the Resource and Training Toolbox section.

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Controller's Office Training Survey

We'd love your feedback!

Scan the QR code or use this link to take a short survey and help us improve future Controller's Office trainings and resources. Your input directly shapes the topics, tools, and tips we share with the university community.

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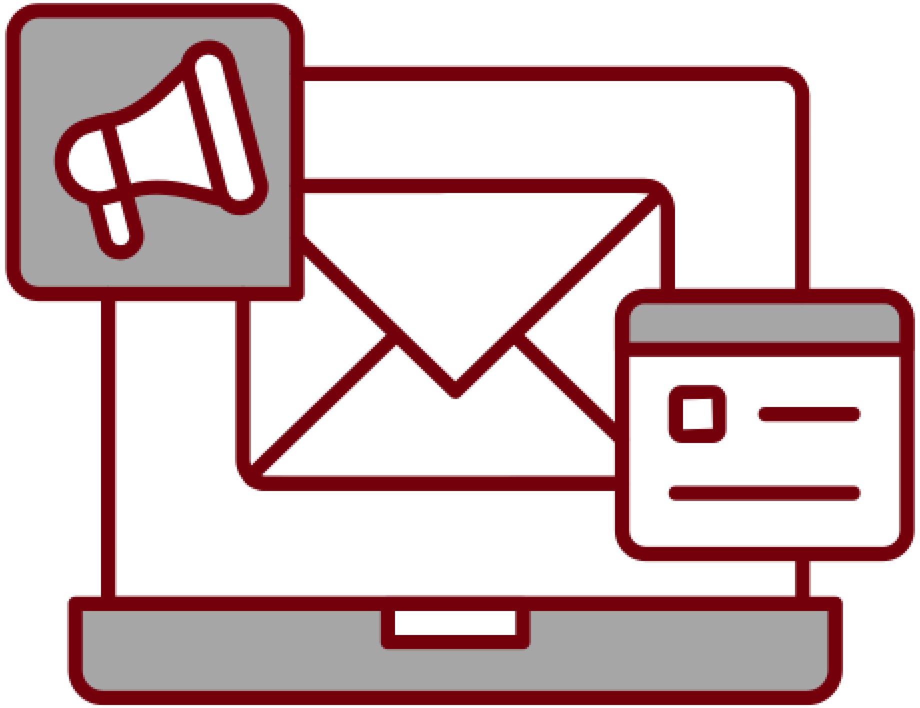
Contact Us



For specific questions, please visit our website to find the appropriate contact.

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Questions

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THANK YOU!

Office of the Controller

Alone, we can do so little; together, we can do so much.

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