How-to Guide: Preparer

1. Click on Create New Payment Request

Create New Payment Request

2. Be sure to select the appropriate request type, or it will be returned for you to submit.

Create Payment Request

3. Fields marked below with ⚫ are required

Create Payment Request

NRA = Non Resident Alien

See instructions below
Payment Options – When you select a vendor and the appropriate address (look for the “remit to” from your invoice), ePR displays the Vendor Default handling code. This code should not be changed unless there are extraordinary circumstances.

Payment for Services
1099 consideration – You cannot submit payment for services AND reimbursement on ONE ePR, they must be separated.

4. Enter line data
5. Enter AD Short Cut (required).

NOTE: AD Short Cut is Activity or Project Number. You may search by either number or name.

6. Option to Add an Approver, when necessary.

Approvers will automatically receive notification when it is their turn to approve.

NOTE: Delegated Approvers – If your payment requires Chair, Dean, or VP approval, you may enter the appropriate person to whom the authority has been delegated in those approval lines, and attach the approved memo of delegation.
7. In the *Preparing State*, the functions menu will look like this:

![Preparing State](image)

8. In the *Workflow State*, these are your functions:

![Workflow State](image)  
*See Important Functions below*

9. Upon Submit: The Preparer will receive an email summary of the request.

**Important Functions:**

- **Email Cover Sheet**: Used if you need to reproduce the email summary
- **Nudge**: Used to resend notification to approvers to remind them to approve.
- **Trash**: Used when request will never be paid.
- **Recycle**: Used to return request to preparing state for edits.