How to process a Payment Request in iProcurement to pay an invoice

1. Complete each line.
2. In the (Invoice #/Business Purpose) field enter:
   - Invoice #
   - Date of Invoice
   - Business purpose (5W’s: who, what, where, when, why).
   This field can contain up to 250 characters maximum.
3. You can continue adding as many invoices as you need, as long as they’re for the same vendor and site.

Click on ‘Payment Request’ tab

Do not check off the ‘Non-Employee Reimbursement box unless creating a reimbursement for non-Harvard employee

Click ‘Add to cart’ and ‘View cart and checkout’ when you’re ready to go to the checkout screen

‘Receiving Required for payment’ will default in checked. It is ok to leave it checked. However, for Payment Requests, receiving is not necessary and the system will ignore this setting.

Confirm and if necessary – edit the information (charge account, description) and click ‘Next’.

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Review the approvers listed for your payment request and add or change any approvers as applicable and add any notes to Approver you may want.

In order to get all the information printed on one page for your record, click on ‘Show’ link under ‘Details’ to reveal the costing string and then click on ‘Printable page’.

When you click ‘Submit’, your requisition will be forwarded through the approval process.

When your payment request is fully approved, a PR number will be generated. Write the whole PR number on the paper copy of the invoice and send it to Central UFS. This step is necessary for the invoice to be paid.