Peoplesoft Finance myForms
New & Improved PeopleSoft myForms

- One Card Forms
  - One Card Application Form
  - One Card Change, Cancellation & Suspension Form
  - One Card Reimbursement Form
  - One Card Dispute Form
- T&E Entry Delegate Form
- Chartfield Request Form
- ARBI Customer Request Form
- Sponsored Billing Form
New Options Found in Navigation Collections

Go Live - June 15, 2020
All Users will have Approval Tile- despite pending approvals

- Displayed amount of pending Approvals
- Filter to approve your Requests
One Card Application Form (New Card)

- Enter EMPL ID & SSO will Populate
- Routes to Level 3 FRI for Campus/ Hosp Accounting > then to One Card Team
- Sensitive Information is now masked once submitted
One Card Change, Cancellation & Suspension Form

- Routes to Level 3 FRI within FIN Structure to Increase Limits > then to One Card Team
- If No change in limits Form routes directly to One Card Team
- No change in approval time- Striving to approve within the 2 day Turnaround
One Card Transaction Dispute Form

Routes to One Card Team

Not Designed to Dispute Tax

To review before completing the form:

- The cardholder has contacted the merchant and attempted to resolve the disputed issue.
- The cardholder understands that a dispute can only be initiated within 60 days of the transaction date.
- The cardholder understands that sales tax cannot be disputed using this form and must be resolved with the merchant.

Complete the following form for your dispute.

Enter additional information about the dispute in the Comments section at the bottom of the form. Providing additional details will assist JP Morgan with the dispute resolution.

Attach any documents at the bottom of the form in the File Attachments section, which may support the dispute request. This may include items such as a copy of the original receipt or order, or correspondence with the merchant.

Cardholder Information

Complete the following fields with the Cardholder or Student Card Custodian information.

* Empl ID:
Cardholder Operator ID:
Name:
Campus:
* Last 4 Digits Credit Card Number:
Cardholder Email Address:
One Card Reimbursement Form

- Enter Empl ID & Last 4 digits to Populate Cardholder Info
- Routes to AP Shared Services
- Enter CRR number for repayment
- Cash advances not always generated
**Entry Delegate Form**

- New! - Enter EMPL ID of Delegate
- No Approvals - Email Notification will be sent once Submitted
- Add or Remove ALL in one form - Multiple Users

### Entry Delegate Information

To begin, use the Lookup icon and enter an Entry Delegate Empl ID. Then select an action.

**Action**

- Select an action.
  - Would you like to add new access? Yes
  - Would you like to view or remove current access? No

### Add Access

<table>
<thead>
<tr>
<th>Traveler/Cardholder Empl ID</th>
<th>Name</th>
<th>HR Dept</th>
<th>HR Status</th>
<th>Valid for Expenses?</th>
<th>myWallet Count</th>
<th>Remove Access?</th>
</tr>
</thead>
<tbody>
<tr>
<td>12095711</td>
<td>Zablocka, Justin William</td>
<td>ACONTRLR</td>
<td>Active</td>
<td>Y</td>
<td>0</td>
<td>No</td>
</tr>
<tr>
<td>12205417</td>
<td>Martin Horst, Kristen Elizabeth</td>
<td>ACONTRLR</td>
<td>Active</td>
<td>Y</td>
<td>0</td>
<td>No</td>
</tr>
</tbody>
</table>

To add traveler/cardholder access, enter the traveler's/cardholder's Empl ID using the Look Up icon. Or simply type the Empl ID and click Tab on tab computer keyboard. (For an employee to be searchable in the Add Access grid, they must have un-cancelled One Card transactions in their myWallet or be classified as active, on leave with pay, or leave of absence.)

Please ensure that each line of the Add Access grid is fully populated before submitting the completed form. Rows in the grid that are not fully populated will result in error.

### Current Access

<table>
<thead>
<tr>
<th>Traveler/Cardholder Empl ID</th>
<th>Name</th>
<th>HR Dept</th>
<th>HR Status</th>
<th>Valid for Expenses?</th>
<th>myWallet Count</th>
<th>Remove Access?</th>
</tr>
</thead>
<tbody>
<tr>
<td>12095711</td>
<td>Zablocka, Justin William</td>
<td>ACONTRLR</td>
<td>Active</td>
<td>Y</td>
<td>0</td>
<td>No</td>
</tr>
<tr>
<td>12205417</td>
<td>Martin Horst, Kristen Elizabeth</td>
<td>ACONTRLR</td>
<td>Active</td>
<td>Y</td>
<td>0</td>
<td>No</td>
</tr>
</tbody>
</table>

To remove traveler/cardholder access select "Yes" in the Remove Access column.

### Comments

Submit
# Entry Delegate Form

Would you like to add new access? **Yes**

Would you like to view or remove current access? **Yes**

### Add Access

<table>
<thead>
<tr>
<th>Traveler/Cardholder Empl ID</th>
<th>Name</th>
<th>HR Dept</th>
<th>HR Status</th>
<th>Valid for Expenses?</th>
<th>myWallet Count</th>
<th>Insert A Row</th>
<th>Delete A Row</th>
</tr>
</thead>
<tbody>
<tr>
<td>10273426</td>
<td>Gates, Danelle Breann</td>
<td>CACCTSER</td>
<td>Active</td>
<td>Y</td>
<td>0</td>
<td>+</td>
<td>-</td>
</tr>
<tr>
<td>12065718</td>
<td>Zabriskie, Justin William</td>
<td>ACONTRLR</td>
<td>Active</td>
<td>Y</td>
<td>0</td>
<td>+</td>
<td>-</td>
</tr>
</tbody>
</table>

To add traveler/cardholder access, enter the traveler/cardholder's Empl ID using the Look Up icon. Or simply type the Empl ID and click tab on the computer keyboard. For an employee to be searchable in the Add Access grid, they must have unrecorded One Card transactions in their myWallet, or be classified as active, on leave with pay, or leave of absence.

Please ensure that each line of the Add Access grid is fully populated before submitting the completed form. Rows in the grid that are not fully populated will result in error.
Chartfield Request Form

- Instructions will Pop Out/to pull to secondary Screen
- Chartfield requested: Dept ID, Program, Project
- Form will route off BU-CSD to Division responsible in FIN Structure> to Accounting
Chartfield Request Form HOSPT & HELTH

Instructions

For assistance completing this Chartfield Request form, please click here for instructions.

Department Information

*Long Description - Please provide additional details for the DeptID being requested. Also include in this field information

- Type of Request
  - Breakout of Existing
  - Merging Existing
  - New Business/Program

- Effective Date

- Long Description

- Executive Director

- Manager
ARBI Customer Request Form

General Information

Select the type of request to proceed. For assistance completing this form or to request an update not listed below please contact: mucashmgmt@umsystem.edu

- **Add New Customer** - Create a new customer ID.
- **Add New Customer Address** - Add an additional address to an existing customer. (Ex: A customer has more than one location)
- **Update Customer Address** - Update a customer's current address. (Ex: A customer has moved to a new location)

Submitted By: Haddock, Michelle Diane

**Type of Request**

- Add New Customer
- Add New Customer Address
- Update Customer Address

Comments

- **Choose type of Customer Request**
- **Routes to Colum Accounting Once Submitted**
- **Replaces Outlook form & will be available to ARBI Users**
Sponsored Billing Form

- New Link on Cashier Page directs to PS
- Multiple Students Entered on One Form
- Send two forms for split funding
Sponsored Billing Form

Grant Chartfield

1. Department Initiates
2. Cashier’s Enters Amount
3. OSPA Approves
4. PI Approves
5. Fiscal Approves (cannot be the requestor)
6. Cashier’s Approves and Enters JE

Non-Grant Chartfield

1. Department Initiates
2. Cashier’s Enters Amount
3. Fiscal Approves (cannot be the requestor)
4. Cashier’s Approves and Enters JE
Resources - Training Guides

- Peoplesoft Financials Training
- Travel & Expense
- One Card
- Chartfield Requests
- ARBI Customer Requests
- Sponsored Billing - Instructional for Colum Campus
Resources - Websites & Email

**UM Finance Support**
Primary Contact for any Finance Related Questions
Employee Validation
Toll Free - 877-752-3334
FinanceSupport@umsystem.edu

**AP Shared Services**
Training Guides/Policies
Employee Validation
apsharedservices@missouri.edu

**ONECARD**
Card Management
Training & Policy
Onecard@umsystem.edu