Using Workflow for GFS

Originators

Any aid lines submitted for approval but not yet approved are available to you under “My Pending Requests.” Clicking on the grey tile or on the “My Pending Requests” link in the Workflow portlet will take you to a listing of all pending requests.

Clicking on the Transaction ID allows you to see details about the aid line including the names and contact information for all approvers.

You can sort by Date Originated to see which aid lines have been waiting the longest for approval. You can also see at a glance the type of aid impacted.

Clicking “RECALL” takes the aid line out of workflow and makes the line available for editing on the appropriate aid entry page.

Home Department Approver Role:

- Ensure that the student's home organization and Tuition Category are correct, i.e., that the correct "home department" is approving the aid, and
- Ensure that the aid being approved conforms to GFS policy, for example, assistantship appointments include the appropriate TAL, assistantships are used to pay for work that is relevant to a student's academic program and advances a student's academic or professional development, and any termination/reduction/cancellation of aid has been properly documented, and
- Ensure that the student is academically eligible for each quarter in which aid is being approved, and
- Ensure that the total amount of aid being given to a student conforms to university, school or departmental guidelines.

Financial Approver Role:

- Ensure that the student is being paid from an appropriate source of funds, and
- Ensure that there is sufficient funding available for the period during which the aid is approved, and
- Ensure that the amount of the expense is appropriate.
My Approvals Page

The GFS Workflow page helps you with your approvals by making all pertinent information available to you at the time of approval. Any aid lines requiring your approval are available to you under “My Approvals.” Clicking on the grey tile or on the “My Approvals” link in the Workflow portlet will take you to a listing of all pending requests.

The list of approvals can be sorted by student name, Aid Year or Category. All GFS approvals for current, future and past years will be found here. The possible categories are Grad, Postdoc and Non-Matric.

When you select a student you will see a list of all aid lines pending approval for that student.

It is important to note that the originator may also be requesting a disbursement override as noted in the far right column. As Home Department Approver, your approval signifies that the student is not required to meet enrollment rules to receive this funding, and as Financial Approver you are agreeing that this source of funding does not require an enrollment status.

Selecting the Transaction ID allows you to see the details of the line to be approved, as well as the other aid the student has received. After you have thoroughly reviewed the student’s aid you may choose to approve all transactions for that student by clicking the box next to the Transaction ID then clicking the “Approve Selected” button. You may also approve, return or decline individual lines.

Quick Approve allows for fewer clicks; you can approve without leaving messages. Return and Decline take the transaction out of Workflow and make the line available for editing in Rejected status.