

AAOU SSC RT USER Guide

Rev. 3/25/2020

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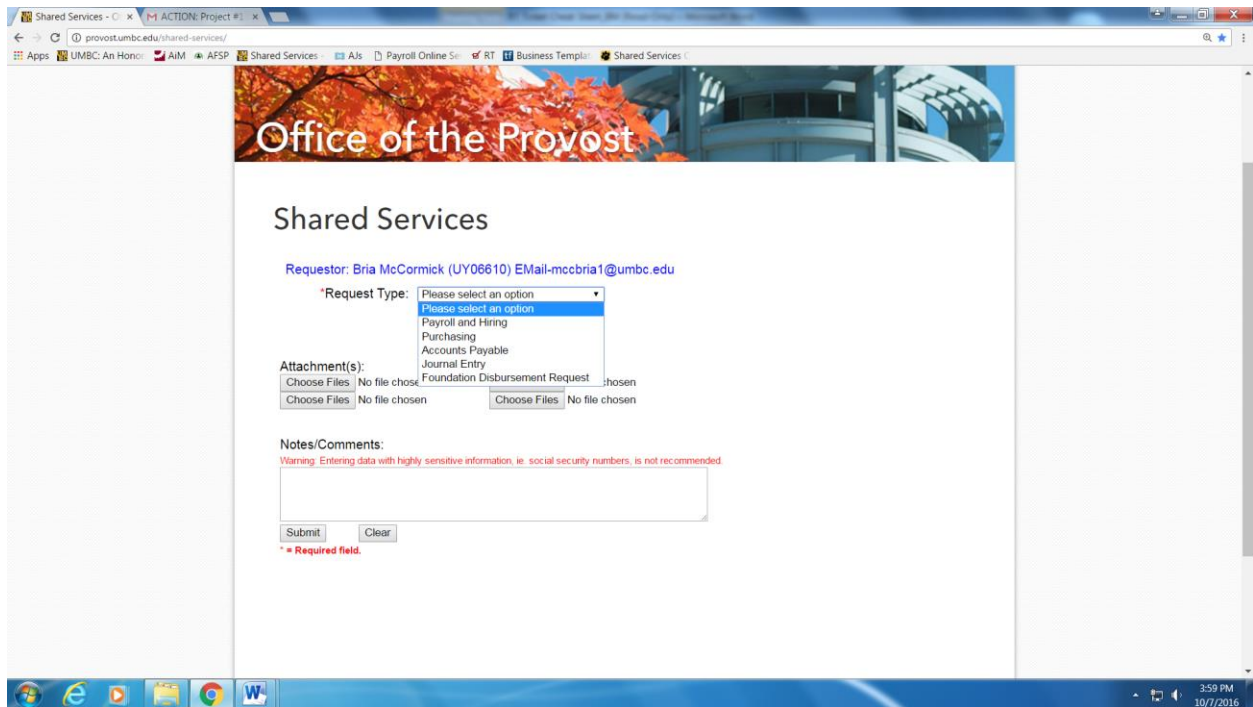
Entering Payroll Requests:

Step 1: Departments decides to hire an employee (*i.e. Exempt, Non-Exempt, Contingent I, Contingent II, and Student Workers*).

Step 2: Department submits an RT ticket utilizing the AAOU SSC website by using the following link <http://provost.umbc.edu/shared-services/> This step should be done immediately as soon as the department decides to hire an individual.

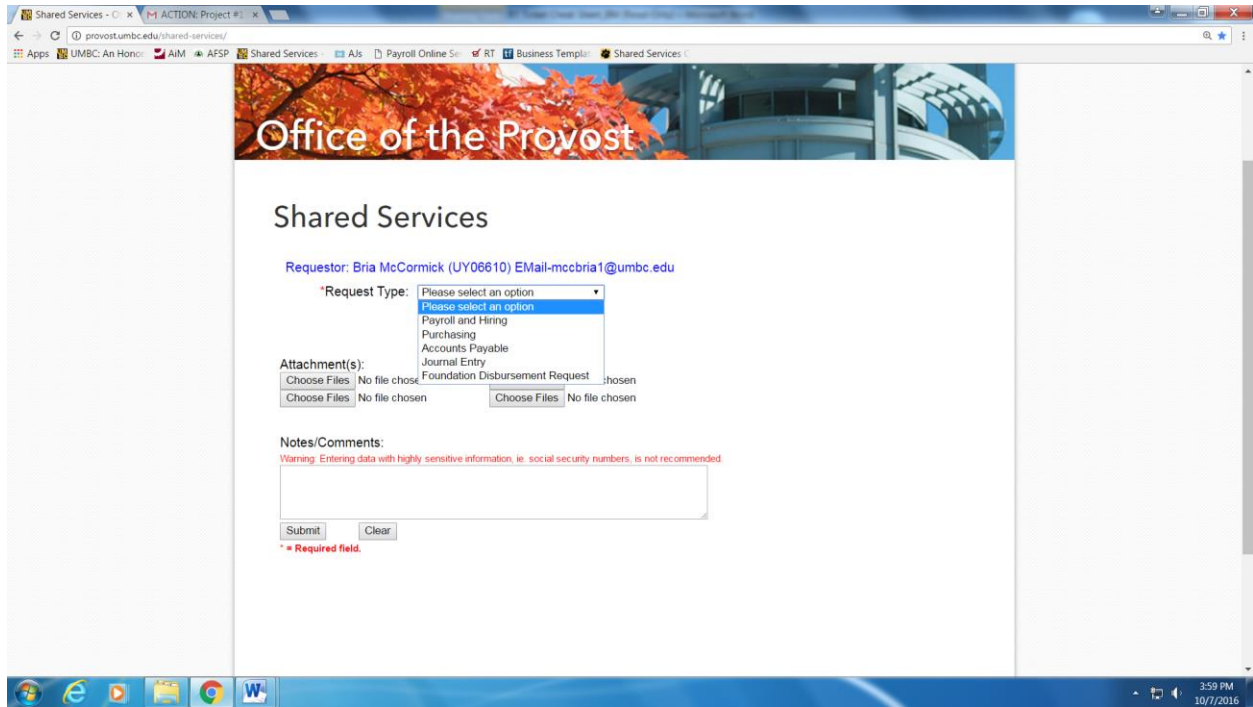
Example of basic step[S] for Payroll Hiring RT:

Step 1 - Select Payroll and Hiring:

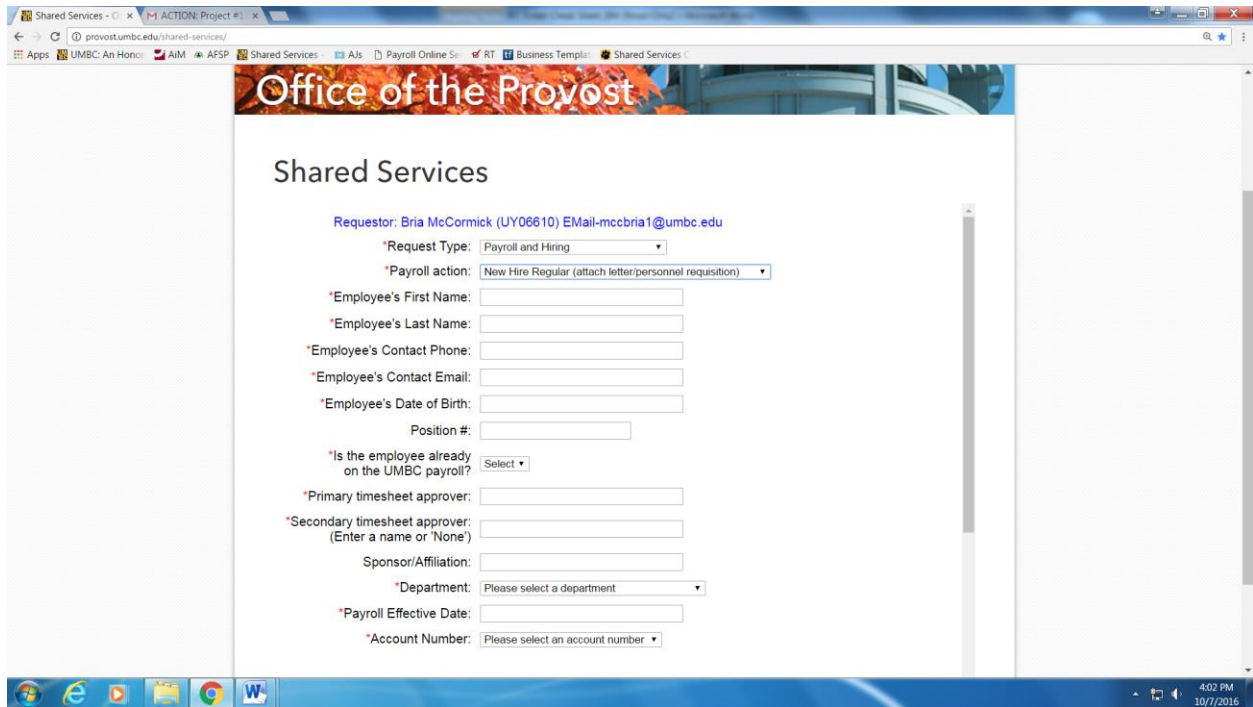


The screenshot shows a web browser window displaying the 'Office of the Provost Shared Services' website. The page title is 'Shared Services'. The requestor is identified as 'Bria McCormick (UY06610) EMail-mccbria1@umbc.edu'. The 'Request Type' dropdown menu is open, showing options: 'Please select an option', 'Payroll and Hiring', 'Purchasing', 'Accounts Payable', 'Journal Entry', and 'Foundation Disbursement Request'. The 'Payroll and Hiring' option is selected. Below the dropdown are three 'Attachment(s)' upload fields, each with a 'Choose Files' button and the text 'No file chosen'. A 'Notes/Comments' section contains a text area and a warning: 'Warning: Entering data with highly sensitive information, ie social security numbers, is not recommended.' At the bottom of the form are 'Submit' and 'Clear' buttons. A red asterisk indicates a required field. The browser's address bar shows 'provost.umbc.edu/shared-services/'. The Windows taskbar at the bottom shows the time as 3:59 PM on 10/7/2016.

Step 2 - Select the appropriate action for payroll action:



Step 3 - Fill in employee information:



Step 4 - Select "yes or no" for already on UMBC payroll:

Office of the Provost
Shared Services

Requestor: Bria McCormick (UY06610) EMail-mccbria1@umbc.edu

*Request Type: Payroll and Hiring

*Payroll action: New Hire Regular (attach letter/personnel requisition)

*Employee's First Name:

*Employee's Last Name:

*Employee's Contact Phone:

*Employee's Contact Email:

*Employee's Date of Birth:

Position #:

*Is the employee already on the UMBC payroll?

*Primary timesheet approver:

*Secondary timesheet approver: (Enter a name or 'None')

Sponsor/Affiliation:

*Department: Please select a department

*Payroll Effective Date:

*Account Number: Please select an account number

Step 5 - Select appropriate department and Fill in Payroll Date (start date of employee):

Office of the Provost
Shared Services

*Payroll action: New Hire Regular (attach letter/personnel requisition)

*Employee's First Name:

*Employee's Last Name:

*Employee's Contact Phone:

*Employee's Contact Email:

*Employee's Date of Birth:

Position #:

*Is the employee already on the UMBC payroll?

*Primary timesheet approver:

*Secondary timesheet approver: (Enter a name or 'None')

Sponsor/Affiliation:

*Department: Please select a department

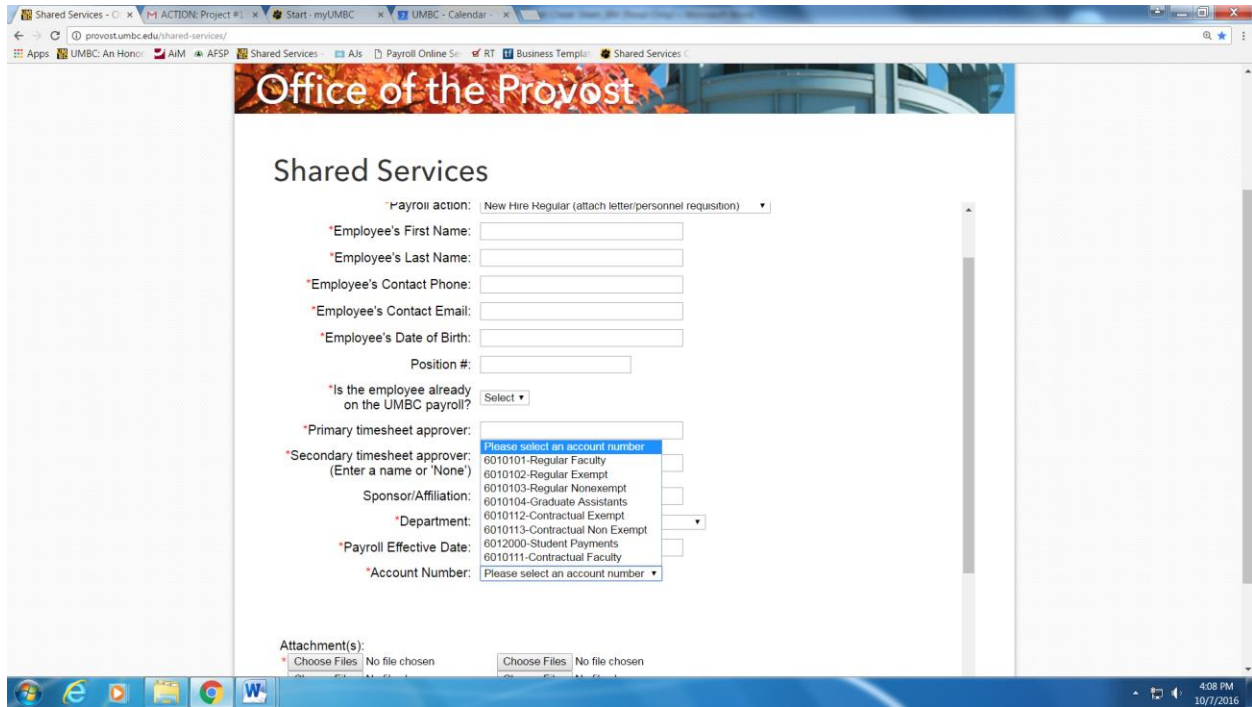
- Please select a department
- 10218 - Faculty Development Center
- 10363 - Provost
- 10434 - Office of Undergraduate Education
- 10489 - Academic Opportunity Program
- 10506 - Faculty Senate
- 10573 - Student Disability Services
- 10717 - Alex Brown Center

*Payroll Effective Date:

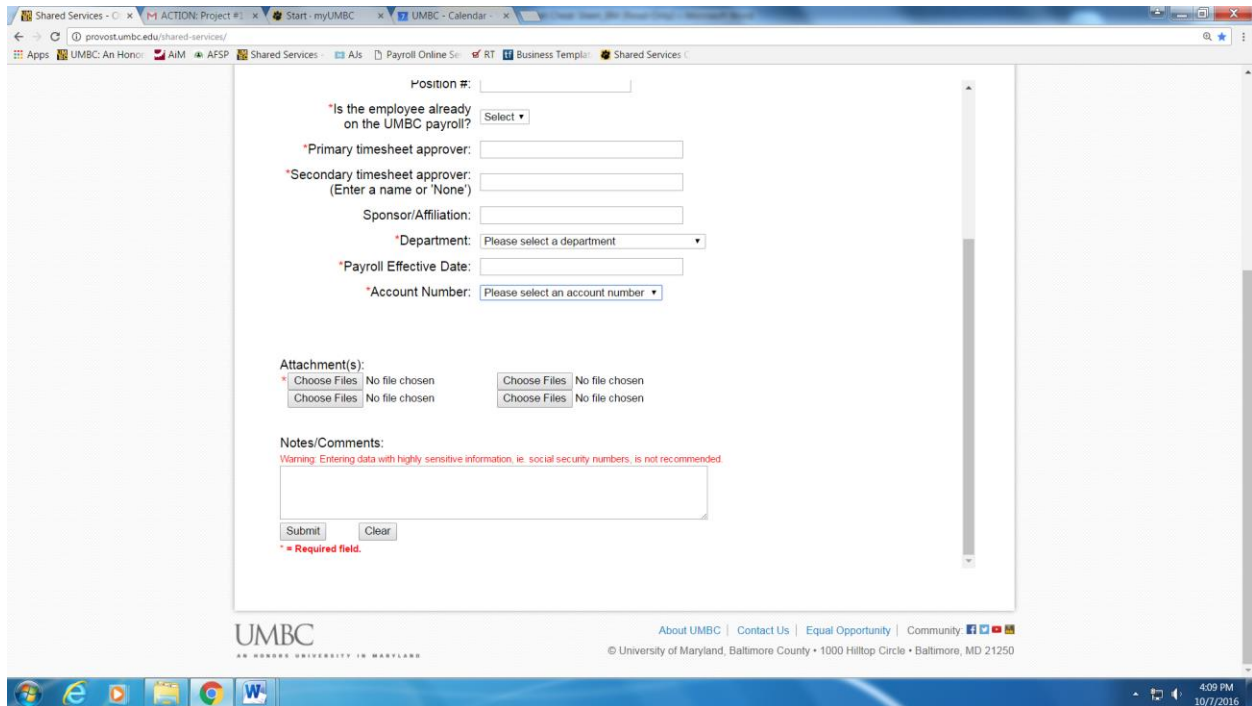
*Account Number:

Attachment(s):
Choose Files No file chosen

Step 6 - Select account numbers:



Step 7 - Attached required documentation (see below), make comments and submit:



***Documentation that should be attached to the RT ticket:**

Exempt & Non-Exempt Employees:

- Human Resource approved personnel requisition form with appropriate signatures,
- Copy of resume
- Appointment letter, and
- Application

Contingent I and II:

- Completed contingent contract (must include department and employee's signature)
- Resume, and
- Application.

Part-time Existing Faculty Members:

- Part-time supplemental faculty appointment letter with the chart-string,
- compensation amount, and
- Pay dates.

Part-time Faculty Members (Non UMBC Personnel):

- Copy of Resume,
- Application,
- Part-time supplemental faculty appointment letter with the chart-string,
- compensation amount, and
- Pay dates.

Graduate Assistants:

- Copy of departmental contract, resume, and application

Student Workers:

- Application, and
- Resume

***Personnel Category note:**

Contingent I:

- Please note, the "if and when needed" category should be selected if the employee will be working less than 20 hours on a weekly basis.
- The number of hours should also be recorded on the contract agreement.

- The contingent I contract agreement for the "if and when needed" status can be executed for:
 - *Year or less; and renewed by a new contract agreement for one year or less.*
- The "temporary" category should be selected if the employee will be working more than 20 hours on a weekly basis. The number of hours should be recorded on the contract agreement. This agreement for the "temporary" status can be executed for:
 - *Six months or less; and renewed one time by a new contract agreement for six months or less.*

Contingent II:

Employee must work a minimum of 20 hour a week.

***Please note - All UMBC employees must complete the appropriate new hire paperwork with an AAOU SSC staff member prior to start working.**

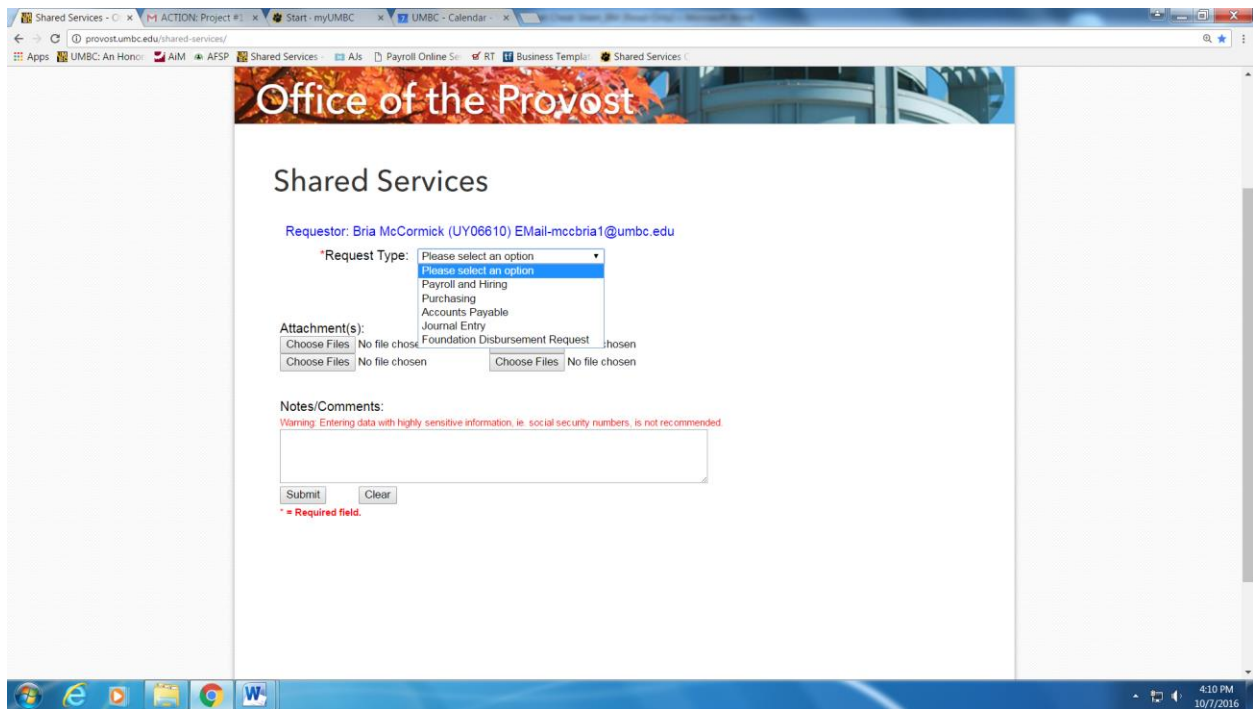
Entering Purchasing RT Request

Step 1: Department needs to make a purchase.

Step 2: Department submits an RT ticket utilizing the AAOU SSC website by using the following link <http://provost.umbc.edu/shared-services/>. This step should be done as soon as the department has a purchase need.

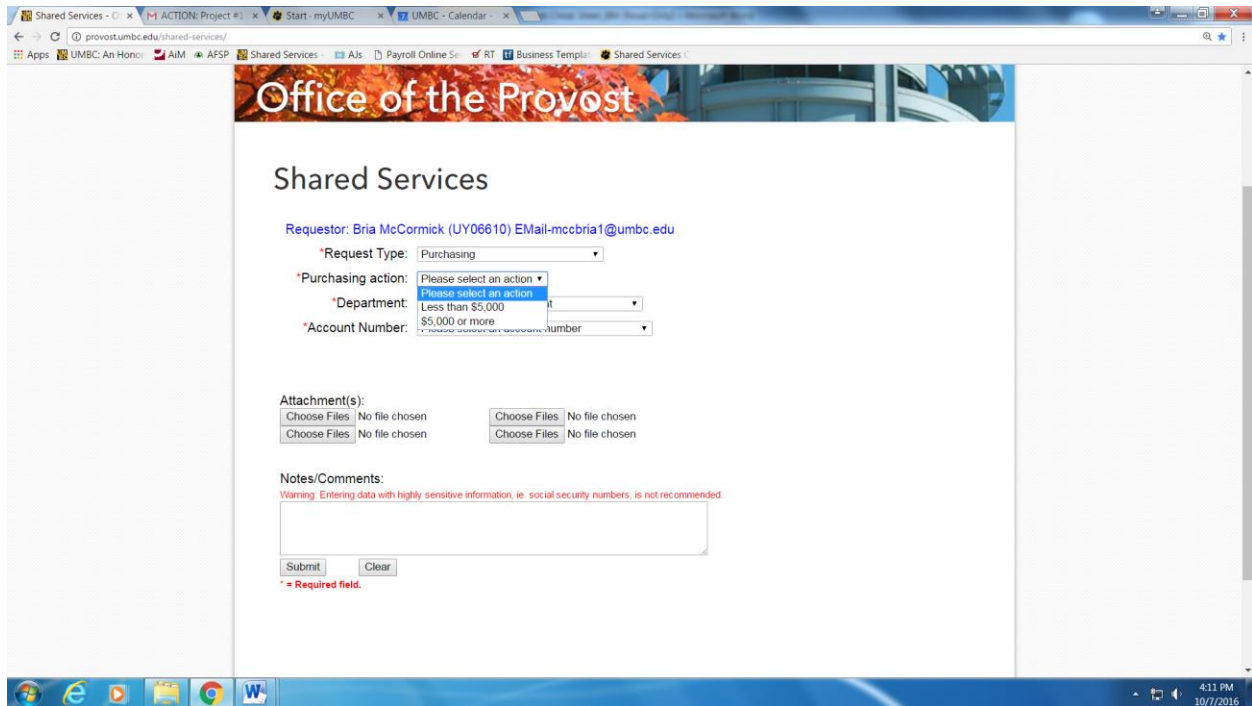
Example of basic steps for Purchasing RT:

Step1 - Select Purchasing:

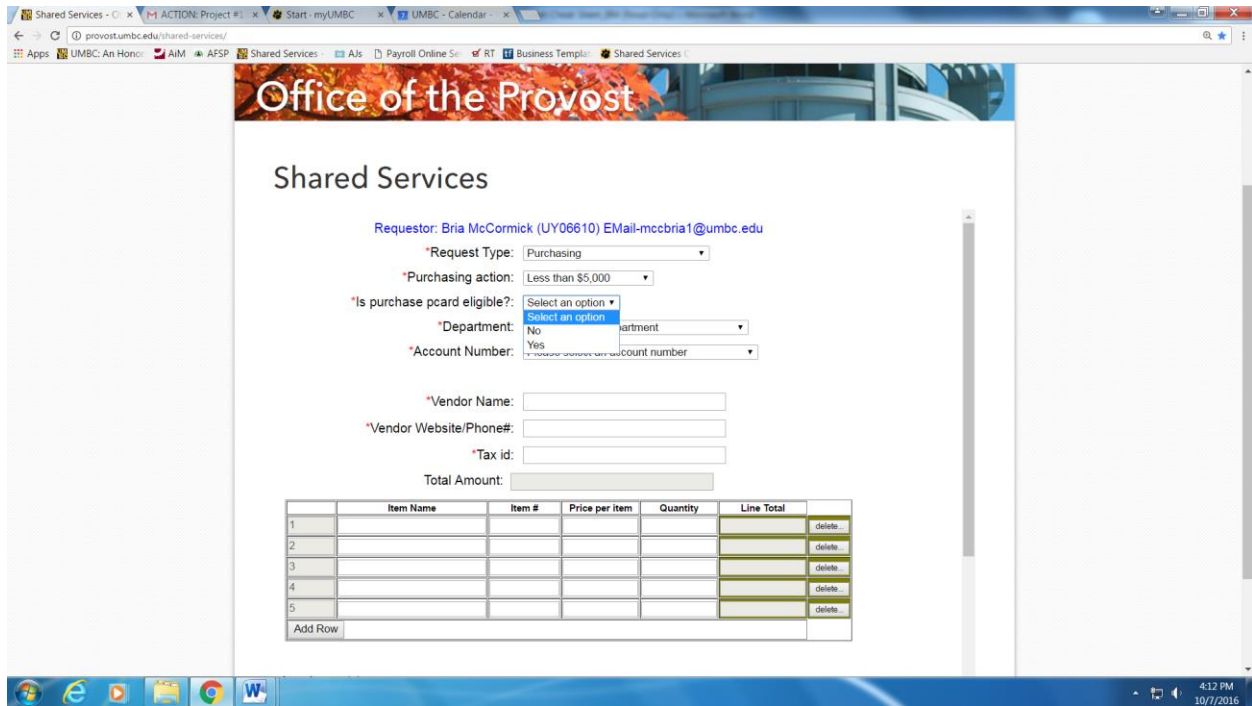


The screenshot shows a web browser window with the URL <http://provost.umbc.edu/shared-services/>. The page header reads "Office of the Provost" and "Shared Services". The requestor is identified as "Requestor: Bria McCormick (UY06610) Email-mccbria1@umbc.edu". The "Request Type:" dropdown menu is open, showing options: "Please select an option", "Payroll and Hiring", "Purchasing", "Accounts Payable", "Journal Entry", and "Foundation Disbursement Request". The "Purchasing" option is highlighted. Below the dropdown are three "Attachment(s):" sections, each with a "Choose Files" button and the text "No file chosen". A "Notes/Comments:" section contains a text area and a warning: "Warning: Entering data with highly sensitive information, ie. social security numbers, is not recommended". At the bottom are "Submit" and "Clear" buttons, and a red asterisk indicates a required field.

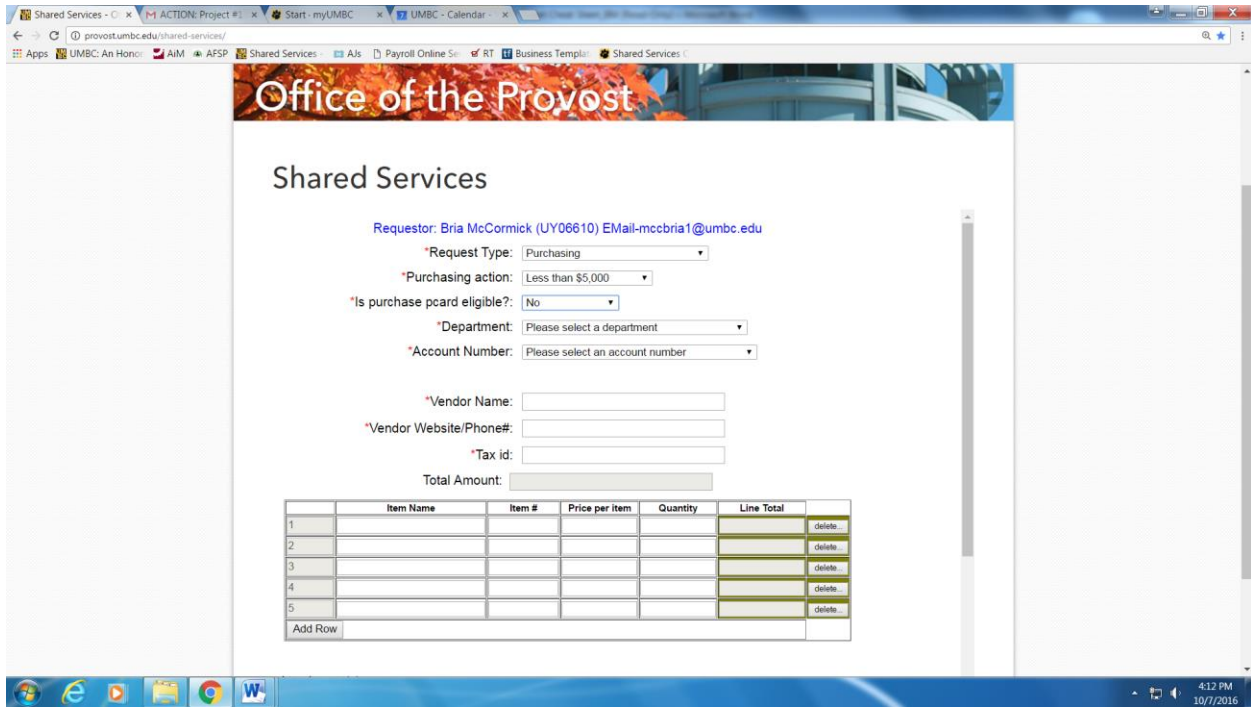
Step 2 - Select appropriate "Purchasing action":



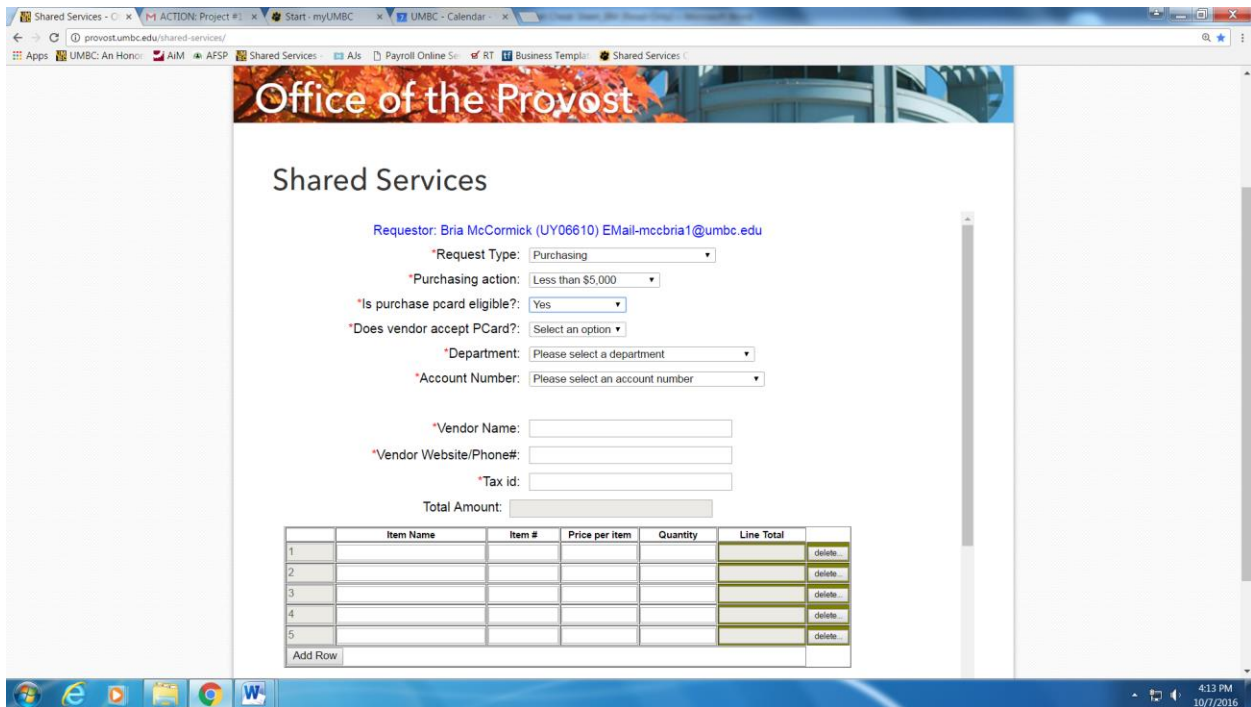
Step 3 - Is purchase PCard eligible?



Step 3 - If "No" is selected, fill out all information domains with a red asterisk beside it:



Step 3 part 2 - If "yes" is selected, fill out all information domains with red asterisk beside it:



Step 4 - Does vendor accept PCard?:

Requestor: Bria McCormick (UY06610) EMail-mccbria1@umbc.edu

*Request Type: Purchasing

*Purchasing action: Less than \$5,000

*Is purchase pcard eligible?: Yes

*Does vendor accept PCard?: No

*Department: Please select a department

*Account Number: Please select an account number

*Vendor Name: _____

*Vendor Website/Phone#: _____

*Tax id: _____

Total Amount: _____

Item #	Item Name	Price per item	Quantity	Line Total	
1					delete
2					delete
3					delete
4					delete
5					delete
Add Row					

NOTE - If selection is "Yes", there is no need for a RT. Please see your departmental PCard Holder.

Requestor: Bria McCormick (UY06610) EMail-mccbria1@umbc.edu

*Request Type: Purchasing

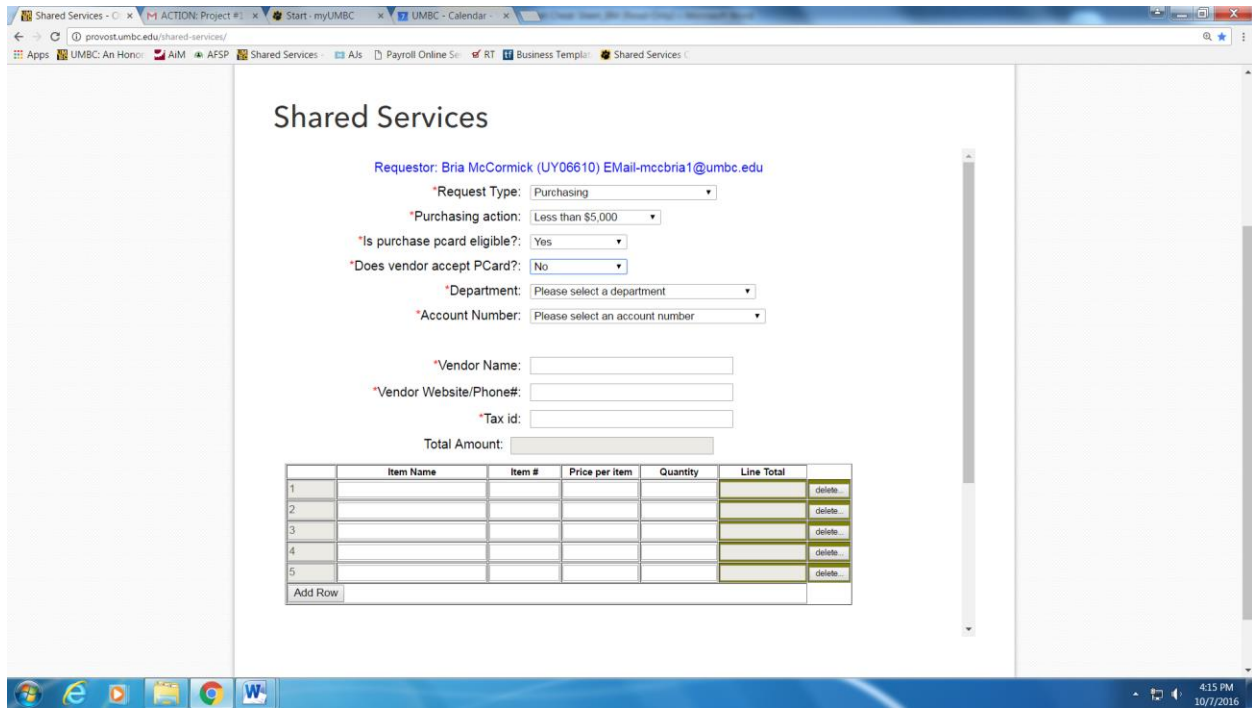
*Purchasing action: Less than \$5,000

*Is purchase pcard eligible?: Yes

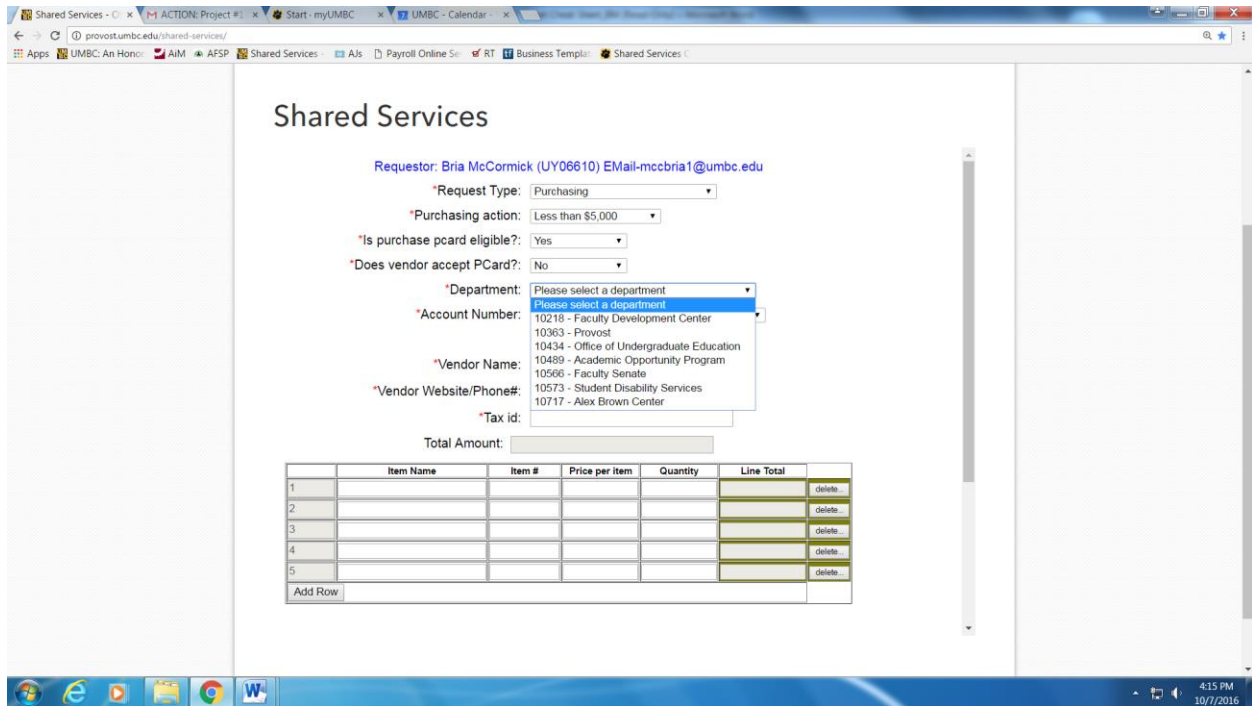
*Does vendor accept PCard?: Yes

Alert: Cannot use this form. See your departmental PCard holder.

Step 5 - If selection is "no":



Step 6 - Select Dept. Number:



Step 7 - Select Account Number:

Requestor: Bria McCormick (UY06610) EMAIL:mccbria1@umbc.edu

*Request Type: Purchasing

*Purchasing action: Less than \$5,000

*Is purchase poard eligible?: Yes

*Does vendor accept PCard?: No

*Department: Please select a department

*Account Number: Please select an account number

*Vendor Name:

*Vendor Website/Phone#:

*Tax id:

Total Amount:

Item	Item Name	Item	Total
1		7069901-Utilities Reimbursement	
2		7070100-Purchase Cost Motor Veh >5k	
3		7070200-Gas and Oil	
4		7070300-Motor Vic. Maint and Repair	
5		7070400-Insurance	
		7080100-Advertising	
		7080105-Employment - Advertising	
		7080400-Printing and Reproduction	
		7080800-Equipment Rental	
		7080900-Equipment Maint & Repair	

Step 8 - Fill out "Vendor Name", Vendor Website/Phone#, and "Tax i.d.":

*Vendor Name: [Text Field]

*Vendor Website/Phone#: [Text Field]

*Tax id: [Text Field]

Total Amount: [Text Field]

Item	Item Name	Item #	Price per item	Quantity	Line Total
1					
2					
3					
4					
5					

Attachment(s):

Choose Files No file chosen

Notes/Comments:

Warning: Entering data with highly sensitive information, ie social security numbers, is not recommended

Submit Clear

Step 9 - Add Item Information (Item name, Item #, Price per item, Line total)

Step 10 - Attach relevant documentation and add comments, if needed:

*Vendor Name:

*Vendor Website/Phone#:

*Tax id:

Total Amount:

	Item Name	Item #	Price per item	Quantity	Line Total	
1						delete...
2						delete...
3						delete...
4						delete...
5						delete...

Add Row

Attachment(s):

Choose Files No file chosen Choose Files No file chosen

Choose Files No file chosen Choose Files No file chosen

Notes/Comments:

Warning: Entering data with highly sensitive information, ie. social security numbers, is not recommended

Submit Clear

* = Required field.

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4:17 PM
10/7/2016

Step 11 - Submit RT.

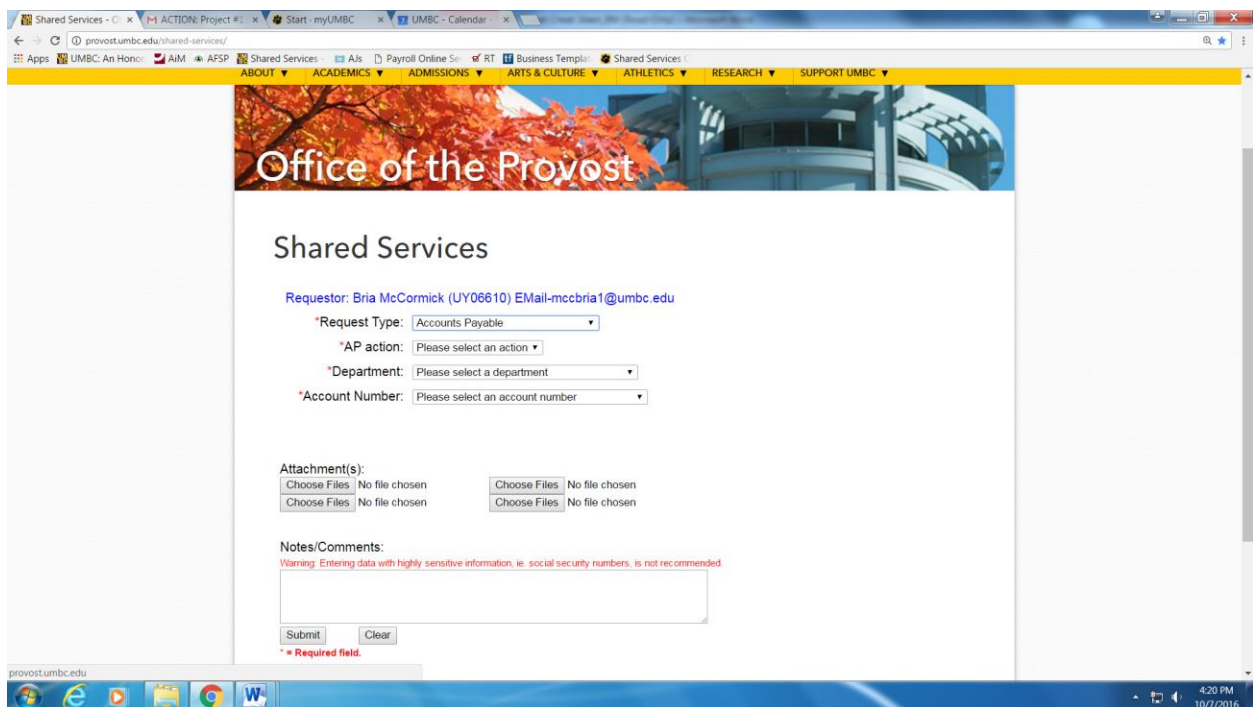
Entering Accounts Payable RT Request

Step 1: Department receives invoice from Accounts Payable/Vendor

Step 2: Department submits an RT ticket utilizing the AAOU SSC website by using the following link <http://provost.umbc.edu/shared-services/> This step should be done as soon as the department receives invoice.

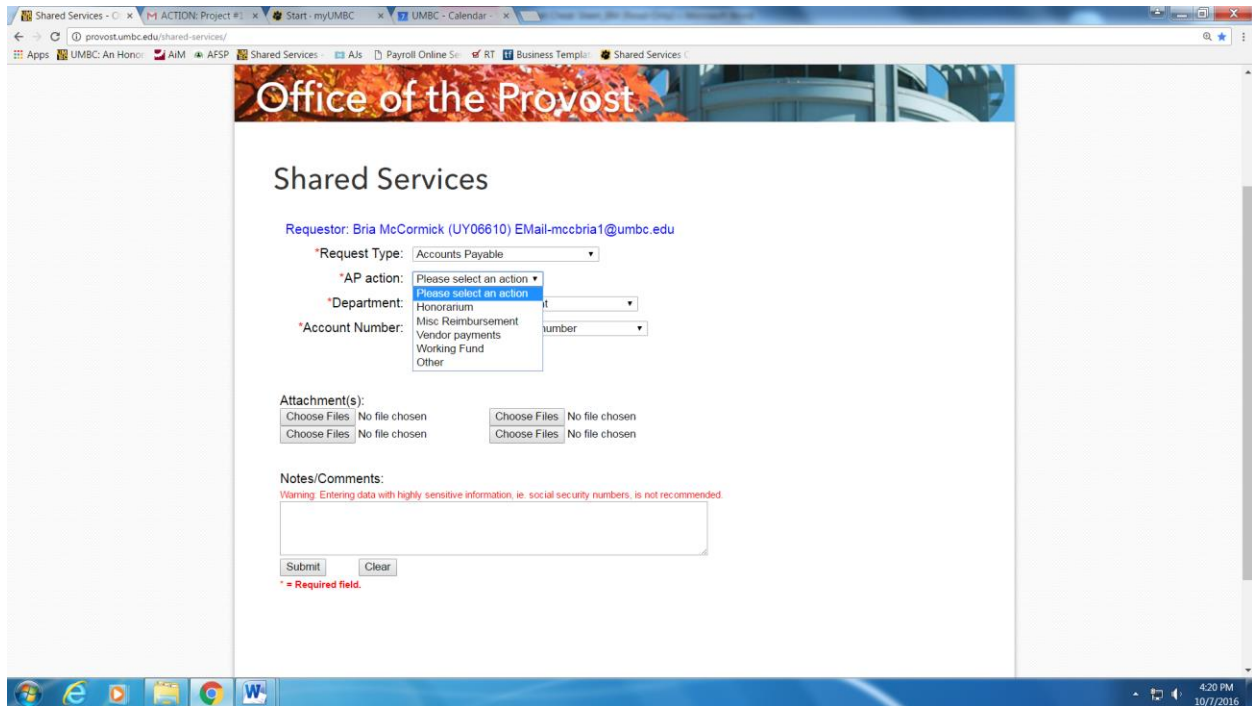
Example of basic steps for Accounts Payable RT:

Step 1 -Select Accounts Payable:

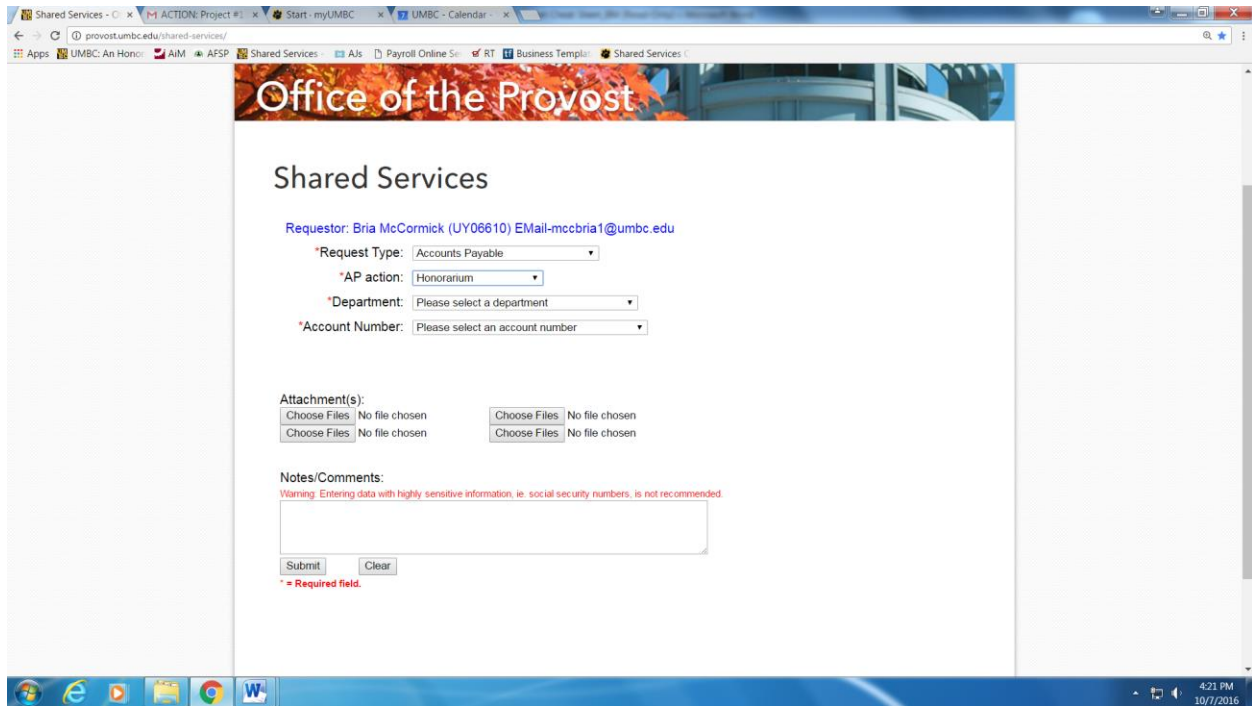


The screenshot shows a web browser window displaying the 'Shared Services' page on the 'provost.umbc.edu' website. The page header includes navigation links for ABOUT, ACADEMICS, ADMISSIONS, ARTS & CULTURE, ATHLETICS, RESEARCH, and SUPPORT UMBC. The main content area is titled 'Office of the Provost' and 'Shared Services'. The requestor is identified as Bria McCormick (UY06610) with email mcbria1@umbc.edu. The form contains several required fields: 'Request Type' (set to 'Accounts Payable'), 'AP action' (set to 'Please select an action'), 'Department' (set to 'Please select a department'), and 'Account Number' (set to 'Please select an account number'). Below these fields are four 'Choose Files' buttons, each with 'No file chosen' text. A 'Notes/Comments' section includes a warning: 'Warning: Entering data with highly sensitive information, ie. social security numbers, is not recommended.' and a text input field. At the bottom of the form are 'Submit' and 'Clear' buttons. A red asterisk indicates that the 'Request Type', 'AP action', 'Department', and 'Account Number' fields are required.

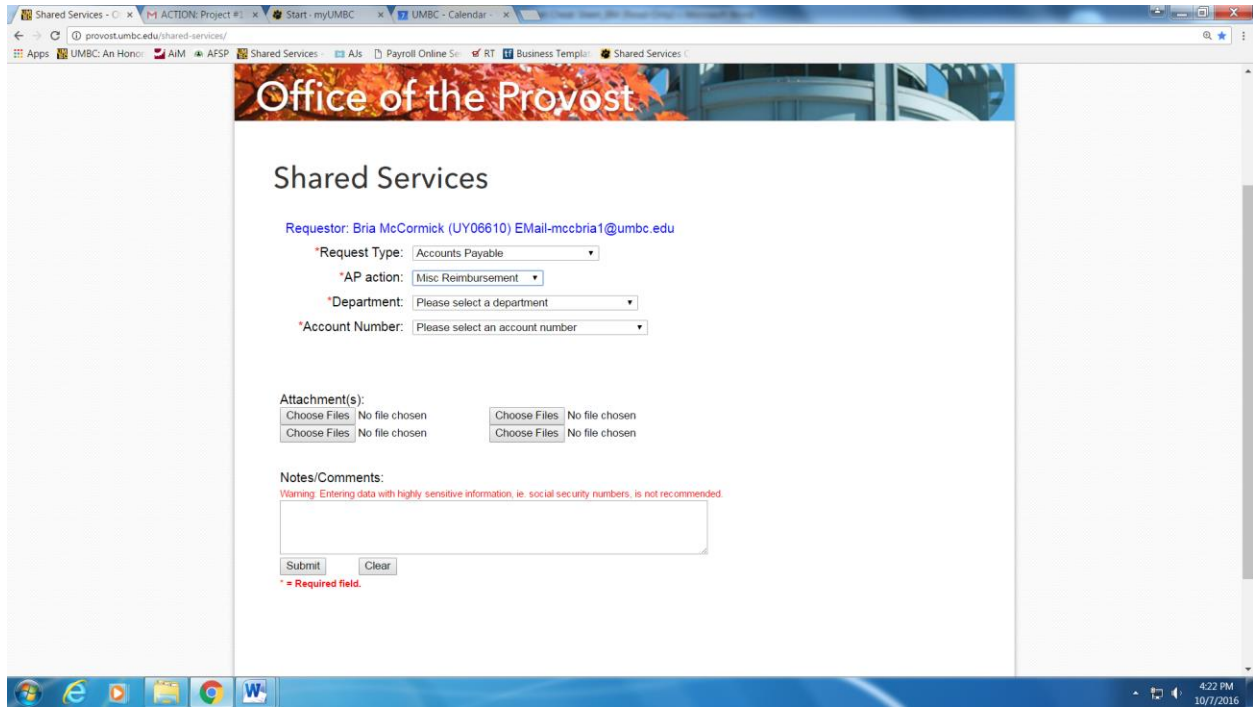
Step 2 - Select AP action:



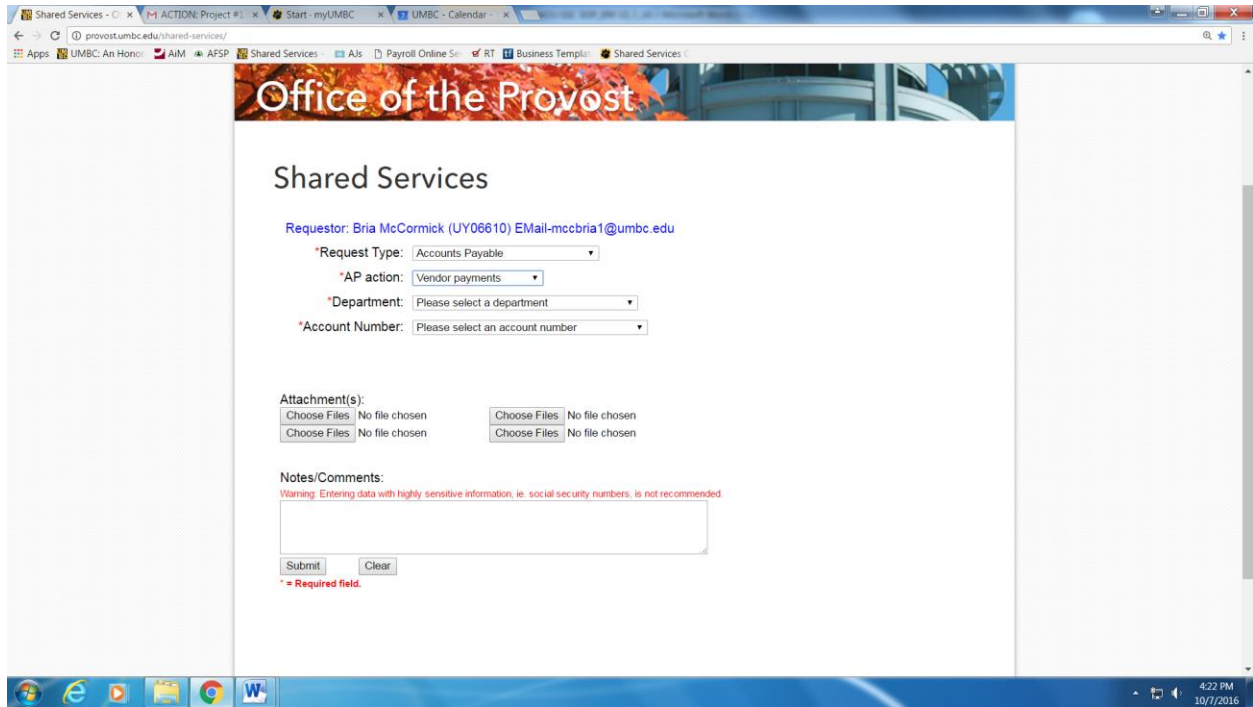
If "Honorarium is selected:



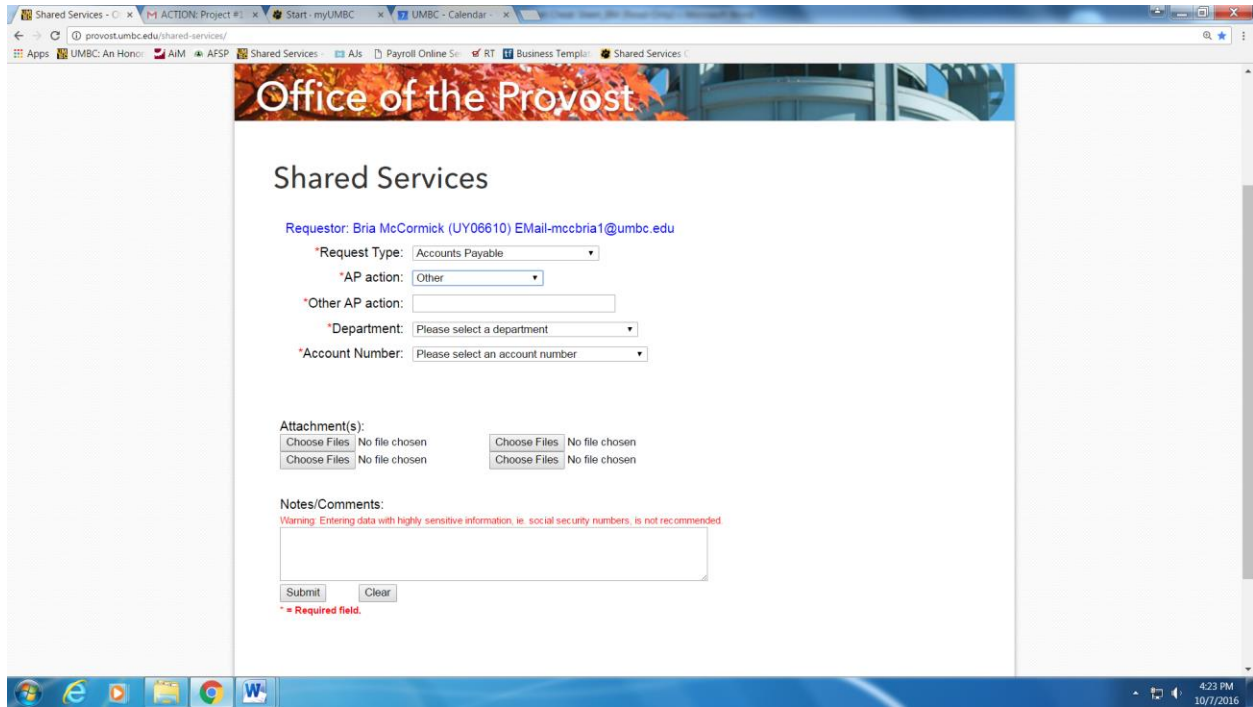
If "Misc Reimbursement" is selected:



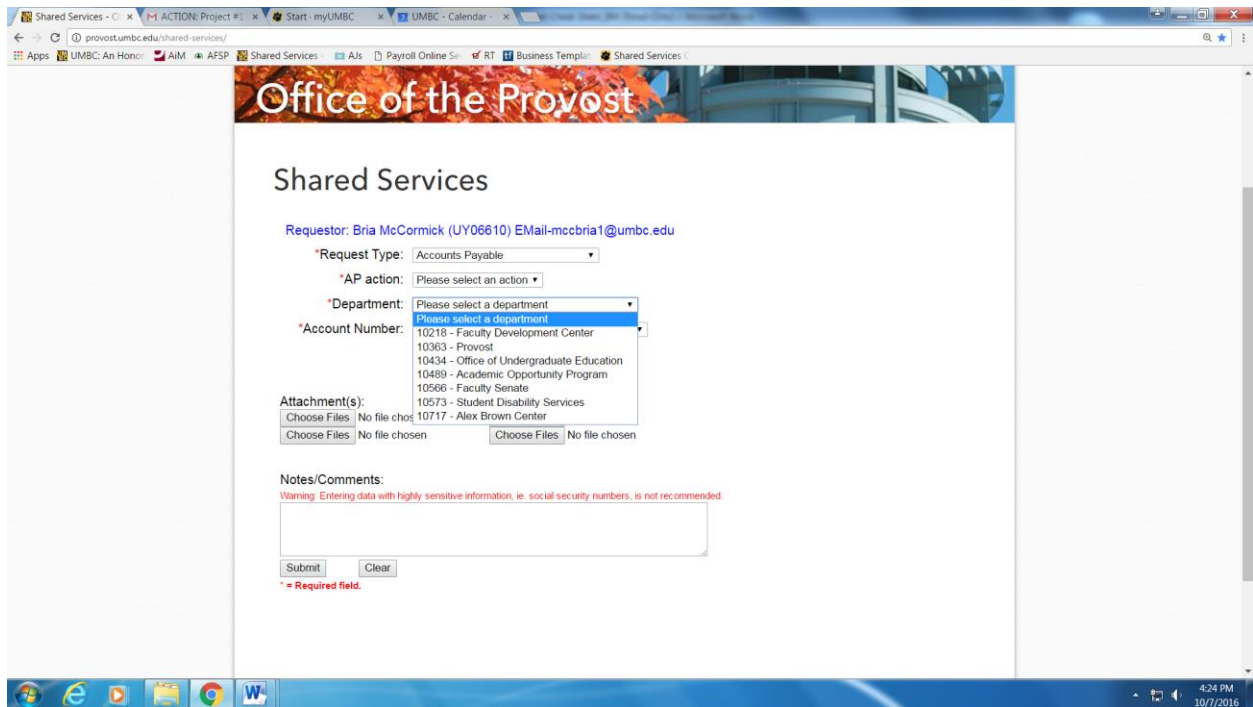
If "Vendor Payments" is selected:



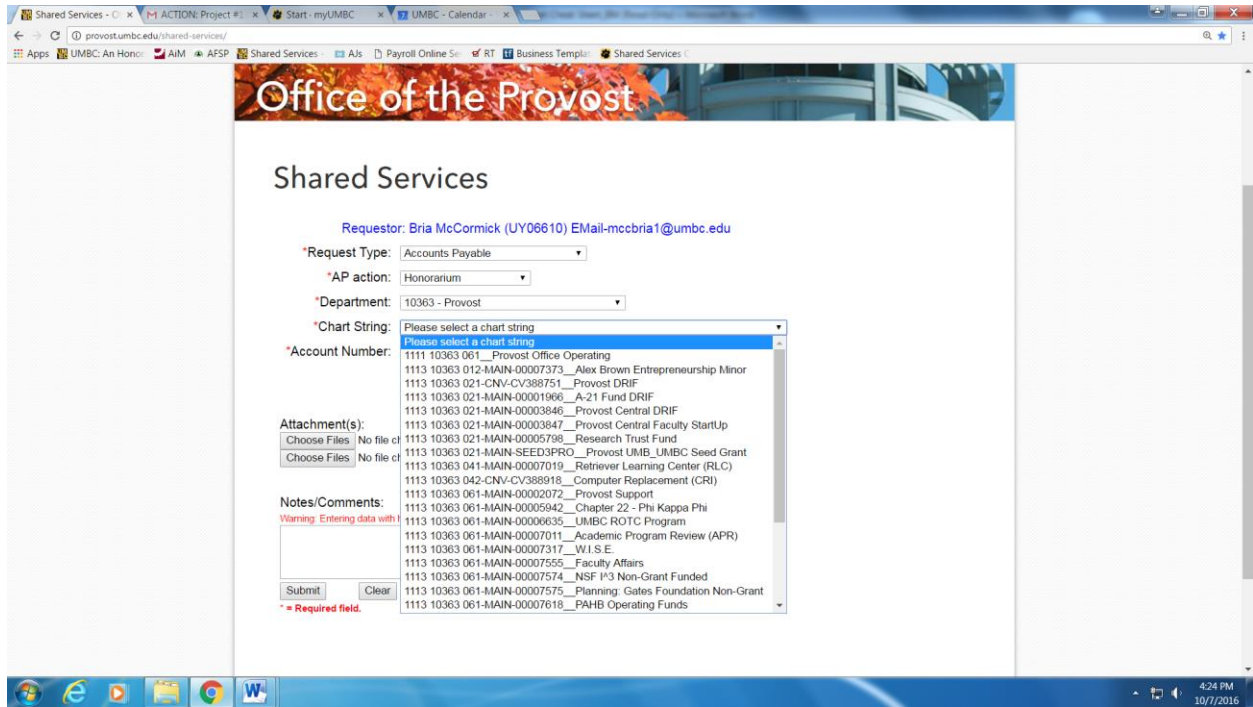
If "Other" is selected:



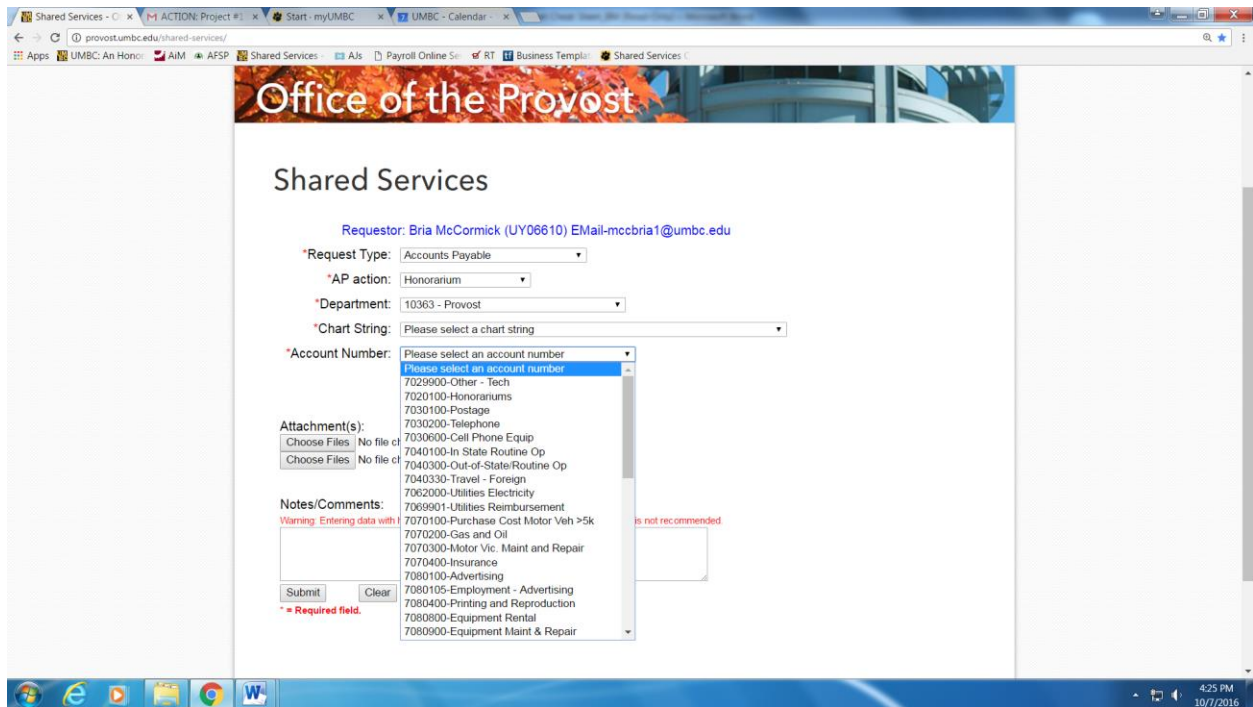
Step 3-Select Department:



Step 4 - Select Chartstring:



Step 5 - Select Account Number:



Step 6 -Attach relevant documentation and write comment, if needed:

Requestor: Bria McCormick (UY06610) EMail-mccbria1@umbc.edu

*Request Type: Accounts Payable

*AP action: Honorarium

*Department: 10363 - Provost

*Chart String: Please select a chart string

*Account Number: Please select an account number

Attachment(s):
Choose Files No file chosen Choose Files No file chosen
Choose Files No file chosen Choose Files No file chosen

Notes/Comments:
Warning: Entering data with highly sensitive information, ie. social security numbers, is not recommended

Submit Clear

* = Required field.

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Step 7 – Submit RT.

Entering Journal Entry RT Request

Step 1: Department needs a Journal Entry created.

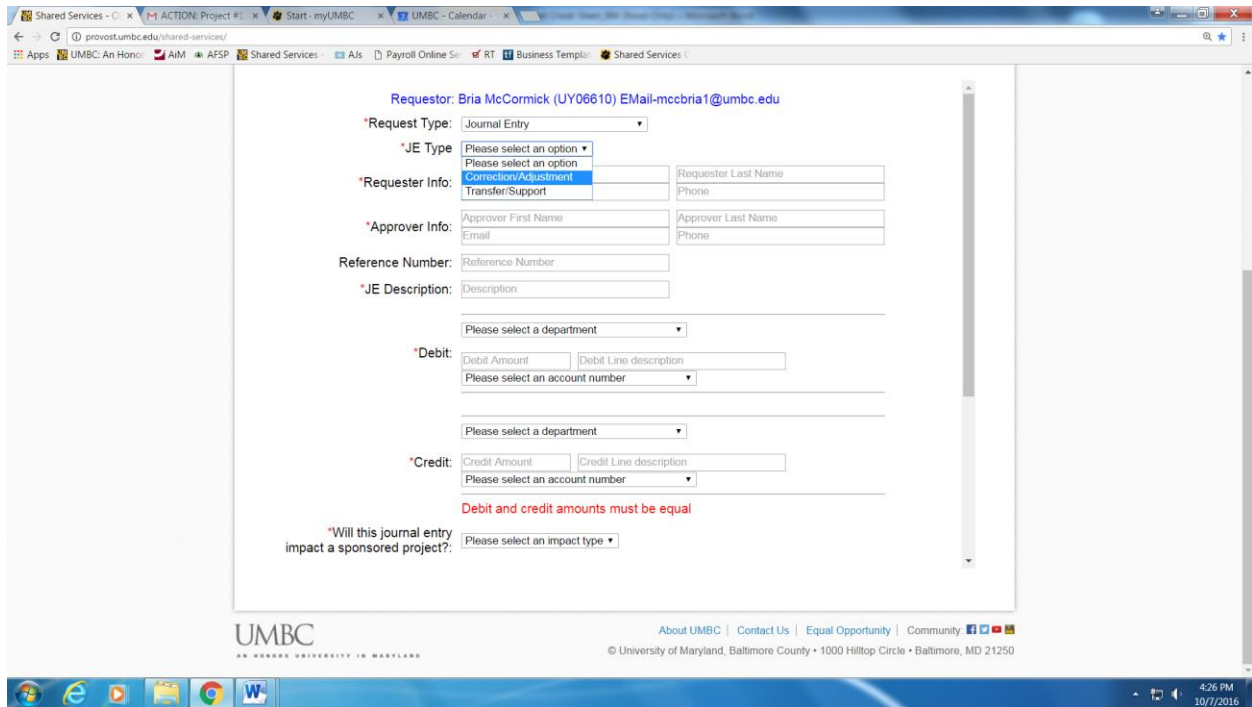
Step 2: Department submits an RT ticket utilizing the AAOU SSC website by using the following link <http://provost.umbc.edu/shared-services/>. This step should be done as soon as the department has a journal entry need.

Example of basic steps for Journal Entry RT:

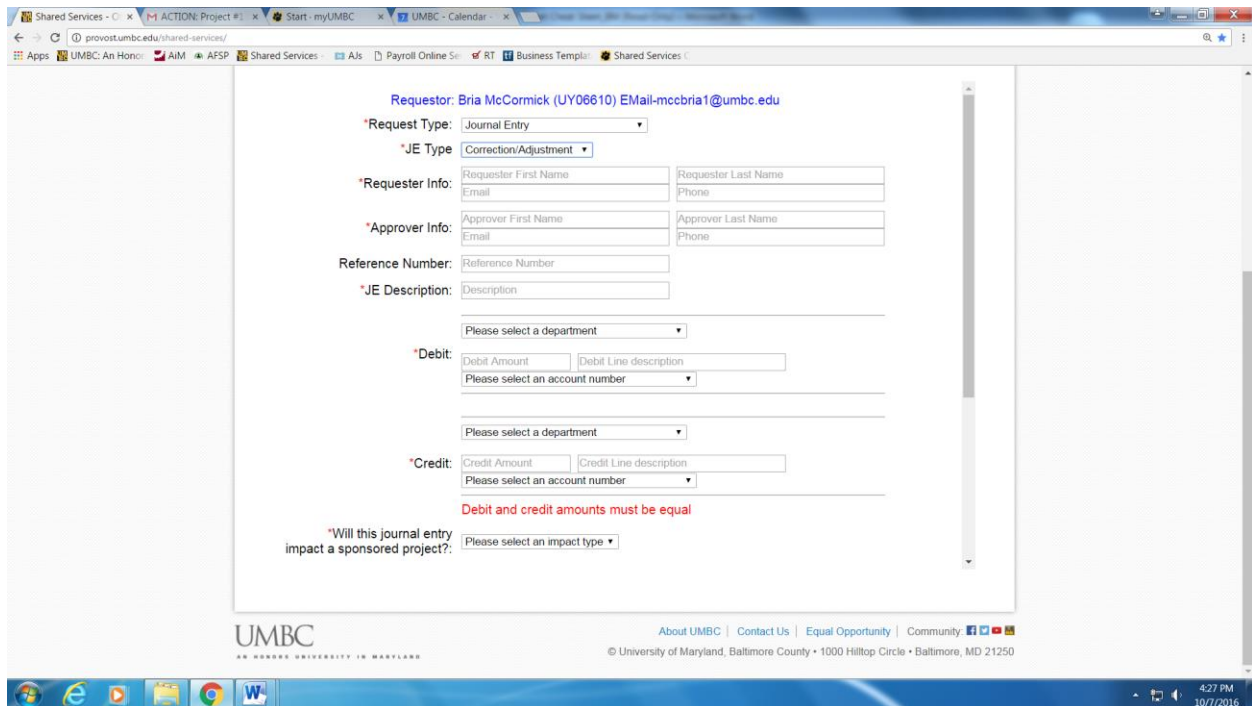
Step 1 - Select Journal Entry:

The screenshot shows a web browser window displaying the UMBC Shared Services portal. The page title is "Requestor: Bria McCormick (UY06610) EMail-mccbria1@umbc.edu". The "Request Type" dropdown menu is open, showing options: "Journal Entry", "Please select an option", "Payroll and Hiring", "Purchasing", "Accounts Payable", "Journal Entry" (highlighted), "Foundation Disbursement Request", and "Approver Information". Below the dropdown, there are input fields for "Requester Last Name", "Phone", "Approver Last Name", and "Phone". There are also fields for "Reference Number" and "JE Description". The "Debit" section includes a "Please select a department" dropdown, "Debit Amount", "Debit Line description", and "Please select an account number" dropdown. The "Credit" section includes "Credit Amount", "Credit Line description", and "Please select an account number" dropdown. A red message states "Debit and credit amounts must be equal". At the bottom, there is a question: "*Will this journal entry impact a sponsored project?" with a "Please select an impact type" dropdown. The UMBC logo and contact information are visible at the bottom of the page.

Step 2- Select JE type:



Step 3 – Fill out all requester info, approver info, Reference # if available and JE Description:



Step 4 - Select department for debit amount (411 Revenue + or 413 Expense +):

Requestor: Bria McCormick (UY06610) EMail-mccbria1@umbc.edu

*Request Type: Journal Entry

*JE Type: Correction/Adjustment

*Requester Info: Requester First Name, Requester Last Name, Email, Phone

*Approver Info: Approver First Name, Approver Last Name, Email, Phone

Reference Number: Reference Number

*JE Description: Description

*Debit: Please select a department (dropdown menu open showing options: 10218 - Faculty Development Center, 10363 - Provost, 10434 - Office of Undergraduate Education, 10489 - Academic Opportunity Program, 10506 - Faculty Senate, 10573 - Student Disability Services, 10717 - Alex Brown Center, Other)

*Credit: Please select an account number (dropdown menu open)

Debit and credit amounts must be equal

*Will this journal entry impact a sponsored project?: Please select an impact type (dropdown menu)

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Step 5 - Fill out all debit information (Dept, complete chartstring, debit amount, line description –why funds are being transferred, and Account #):

*Approver Info: Approver First Name, Approver Last Name, Email, Phone

Reference Number: Reference Number

*JE Description: Description

*Debit: 10218 - Faculty Development Center (dropdown menu open showing options: Please select a chart string, Debit Amount, Debit Line description, Please select an account number)

*Credit: Credit Amount, Credit Line description, Please select an account number (dropdown menu open)

Debit and credit amounts must be equal

*Will this journal entry impact a sponsored project?: Please select an impact type (dropdown menu)

Attachment(s): Choose Files No file chosen, Choose Files No file chosen, Choose Files No file chosen

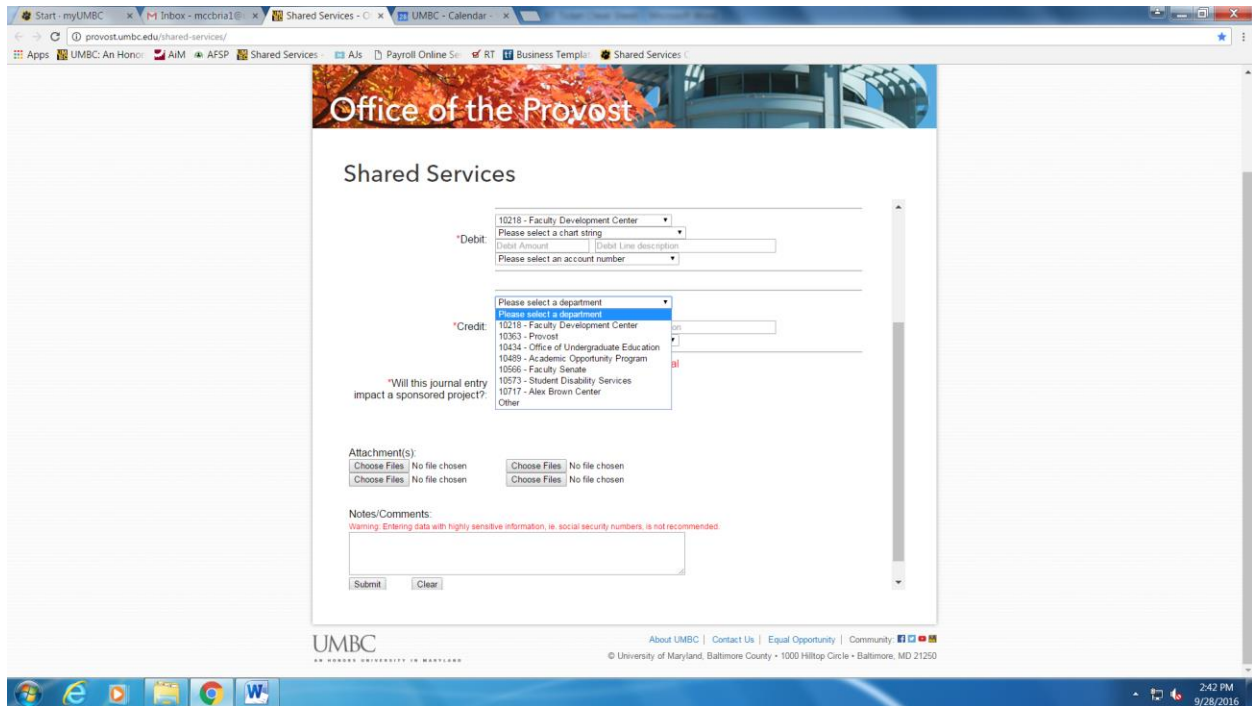
Note/Comments:

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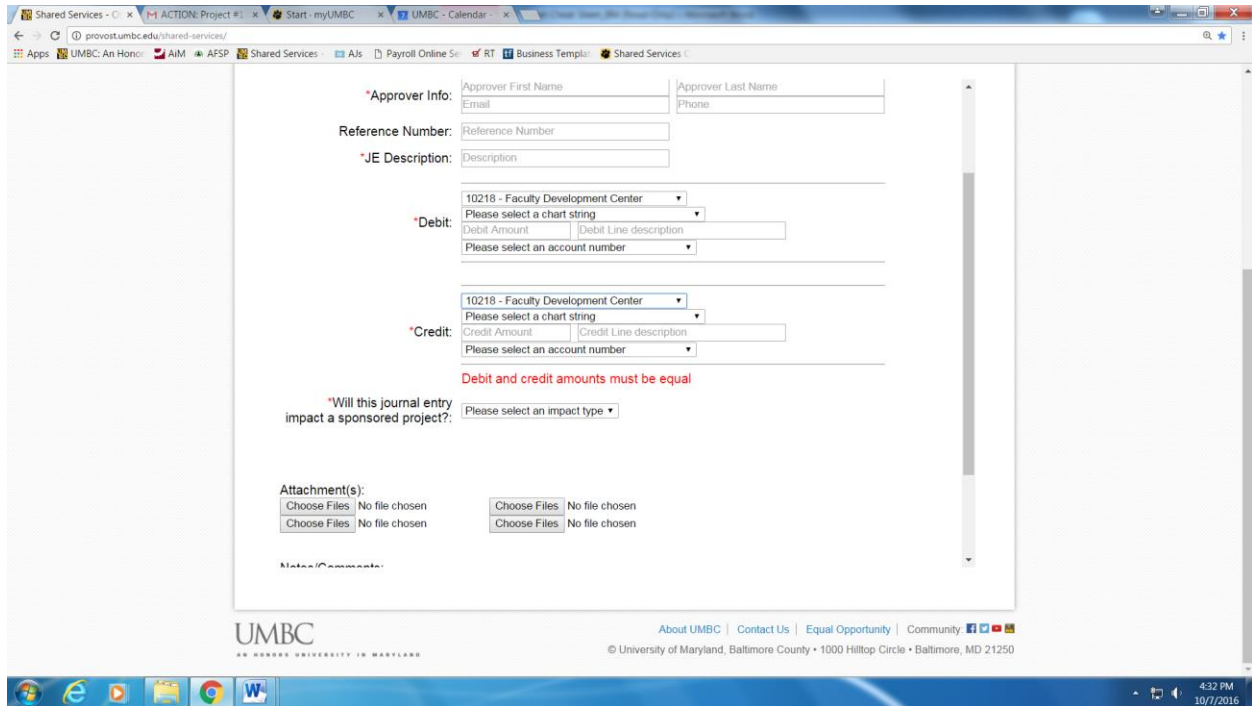
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Step 6 - Select department for credit amount (410 Revenue - or 412 Expense -):



Step 7 - Fill out credit amount information. (Credit, complete chartstring, debit amount, line description –why funds are being transferred, and Account #):



NOTE: Debit and credit amount MUST MATCH!

Step 8 – Select sponsored project impact:

*Approver Info: Approver First Name, Approver Last Name, Email, Phone

Reference Number: Reference Number

*JE Description: Description

10218 - Faculty Development Center

*Debit: Please select a chart string, Debit Amount, Debit Line description, Please select an account number

10218 - Faculty Development Center

*Credit: Please select a chart string, Credit Amount, Credit Line description, Please select an account number

Debit and credit amounts must be equal

*Will this journal entry impact a sponsored project?: Please select an impact type, No (selected), Yes

Attachment(s): Choose Files, No file chosen

Notes/Comments:

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Step 9 - Attach relevant documentation and write comment, if needed:

*Debit: Please select a chart string, Debit Amount, Debit Line description, Please select an account number

10218 - Faculty Development Center

*Credit: Please select a chart string, Credit Amount, Credit Line description, Please select an account number

Debit and credit amounts must be equal

*Will this journal entry impact a sponsored project?: No

Attachment(s): Choose Files, No file chosen

Notes/Comments: Warning: Entering data with highly sensitive information, ie. social security numbers, is not recommended.

Submit, Clear

* Required field.

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Step 10: Submit RT.