Emory Express Check Request

- The Check Request form is used to request initial payment for Goods and Services when a PO does not exist.
- It is only used to pay Companies. Individuals are paid through Compass.
- Check Requests automatically “flip” to invoices after Department and New Vendor (when applicable) approvals. The Invoice is reviewed by Payment Services within 5 business days of becoming a PO.
- Many of the steps required to complete a Check Request are on the form.

1. Access the **Check Request Form** from the Emory Express home page:
2. **Complete the form** as instructed within the form text

- Enter the Supplier Name. If the supplier is not in the system enter New Supplier and follow the New Supplier steps below. Do not choose New Supplier because of the address; you may update that at the bottom of the form.

- Enter the description or business purpose, quantity, and amount to pay in the Product Information section.

- Enter the Supplier Invoice # and Invoice Date (make sure invoice date matches the document). This impacts speed of pay! If this is a partial payment or a previously cancelled invoice, enter an 'A' after the number.
3. For one invoice, click “Go” at the top right. For multiple invoices select “Add to Cart” and click “Go”. Edit the form to match the next invoice you wish to pay. Click “Go”. After your final invoice, change the action back to “Add and Go to Cart” and click Go.

4. Proceed to Checkout
5. Click “Edit” to enter your **SmartKey** and **Account Code**.

6. Enter your **SmartKey** and **Account Code**, then “Save”.

7. Select Final Review from the pathway header.

8. **Place Order**.

9. After the Department Approves and New Suppliers are established (when applicable) the Invoice becomes a Purchase Order and goes to Payment Services for review.

10. Payment Services will process within 5 business days of receipt.
How do I check status of a Check Request?

To check status,

1. Enter the requisition or purchase order number in the lookup section:

2. Click the lookup glass. Select the Purchase Order number if one exists. Otherwise select the requisition number (see step 9). Note that the Invoice number will not appear for check requests, however that does not mean the invoice does not exist.

3. Select the Invoices Tab
4. The **Payment Status** will appear. You will select the **Voucher No.** link to locate additional information, such as payment date and reference IDs or approximate date for approval.

5. On check requests: “**In process**” indicates it is pending Payment Services approval. Approval is done within 5 business days of receipt. The receipt date is the accounting date.

6. If 5 business days have passed, review the **due date**.
7. If the due date has passed, and it is 5 business days after the accounting date, review the Comments and History Tab. The Comments tab will indicate reasons for delay. The History tab will advise when the payment was sent to our ERP; payments should remit the next business day.

8. Once the payment is processed, the payment date and reference ID will display on the Voucher page under the Payment Information section. Note: payment information posts to Emory Express the evening payment remits.

9. If a Purchase Order does not exist, select the requisition number.
10. Click on the **PR Approvals** tab.

11. Select the “**View Approvers**” link on the pending step to see who it is pending with. Note that Dept Approval and Admin Approval indicate it is waiting within their department or school. The other queues are within our area and we do not have to provide names for those. Only provide the names when it is pending in the department, otherwise provide the time frame it will process using the information below.

   a. Check Request Form Review - processes within a few hours of the business operating time
   b. New Supplier – processes in 2-3 business days
   c. After all workflow steps are complete we will review and process the request within 5 business days.