



**PeopleSoft_Financials_Upg
rade_to_PUM51_Delta
Payment Request
Enhancements**

Version Date: October 22, 2025

Training Guide
Payment Request Enhancements

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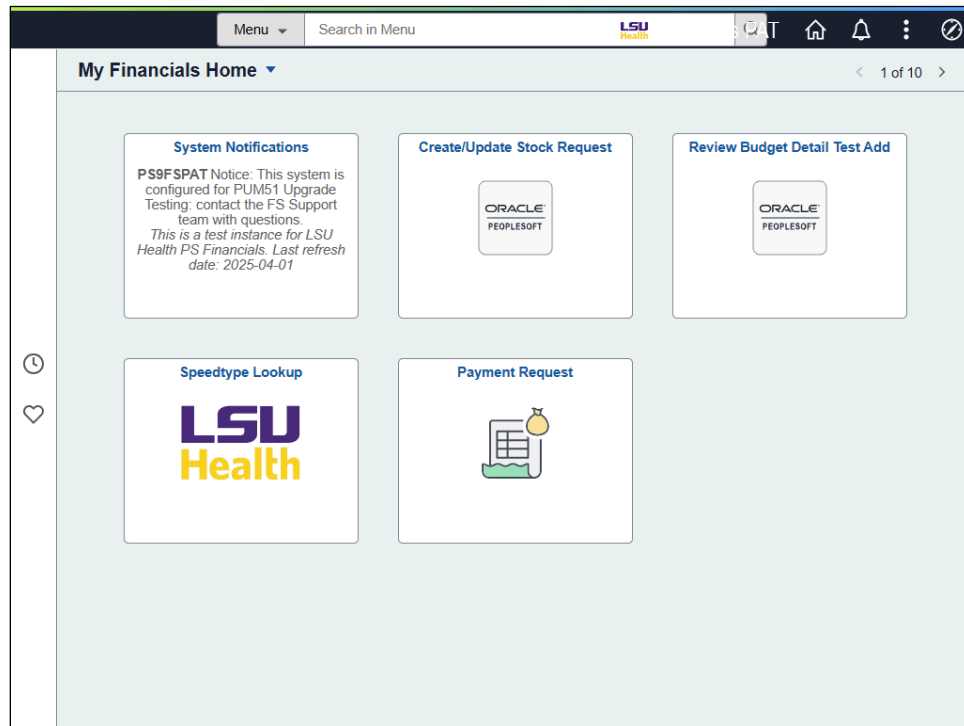
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 Payment Request Enhancements1

PeopleSoft_Financials_Upgrade_to_PUM51_Delta

Payment Request Enhancements

Procedure

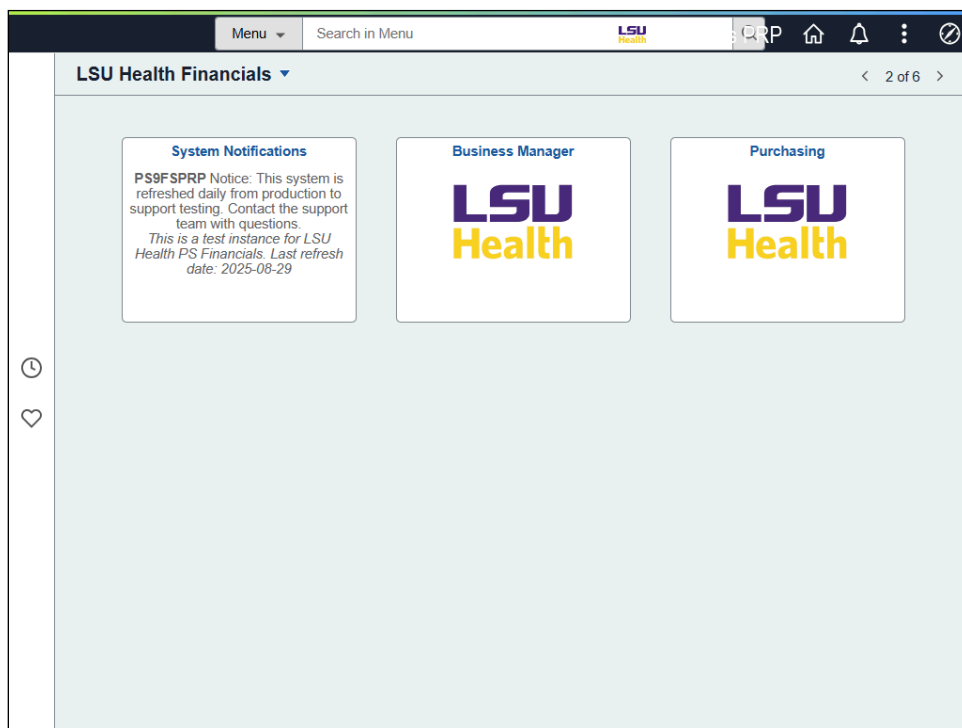
In this topic you will learn about **Payment Request Enhancements**.



Training Guide

Payment Request Enhancements

Step	Action
1.	Payment Requests <u>PAT - Upgraded</u> Payment Requests include several enhancements with the upgrade. The Support Team has created an <i>updated Payment Request User Guide</i> for the New Orleans and Shreveport campuses. The Payment Request Center, to create or review requests, is accessible from the My Financials Home or LSU Health Financials. • Added the <i>Payment Address</i> field in the Supplier page. • Added an option to <i>edit the supplier payment address</i> while creating or updating payment request transactions. • <i>Validate duplicate invoice numbers</i> before submission, review and approval of a request. • Fluid Payment Request template includes <i>new fields</i>: <i>Accounting Tags</i>, <i>Payment Handling</i>, <i>Payment Message</i>, and <i>Separate Payment</i>. • <i>Requesters</i> can now <i>update</i> payment requests until the transaction has been <i>fully approved</i>. • <i>Requesters</i> can now create a <i>new request</i> by <i>copying</i> from an existing request. • <i>Save For Later</i> button <i>changed</i> to <i>access</i> from the Actions menu.



Training Guide

Payment Request Enhancements

Step	Action
2.	Payment Request - Save For Later <u>PRP - Not upgraded</u> In fluid payment requests, the ability to 'Save For Later' still exists. However, there is <u>no</u> longer a <i>button</i> on the page. Users will need to <i>select</i> the <i>Actions ellipses</i> to be able to 'Save For Later' from the Payment Request entry page.

Payment Request

Financials PAT

1 Summary 2 Supplier 3 Invoice Details 4 Review and Submit

Next >

Step 1 of 4: Summary

Attachments (1)

*Business Unit LSUNE
LSU New Orleans Employee BU

Entered Datetime 09/24/25 4:23PM
Request ID

*Invoice Number 1256

*Invoice Date 09/24/2025

*Cost Sub-Total 523.82

Other Cost

Total Amount 523.82

*Currency USD

Description

Notes/Comments Please enter information below:
Payee Name:
90 characters remaining

Step	Action
3.	Payment Request - Save For Later <u>PAT - Upgraded</u> Three (3) fields <u>must</u> contain data before a Save For Later can be initiated: 1. *Invoice Number 2. *Cost Sub-Total 3. Attachments Click the Actions (3 dots) menu.

Training Guide

Payment Request Enhancements

Payment Request

Financials PAT

1 Summary 2 Supplier 3 Invoice Details

[Save For Later](#)

[Home](#)

Step 1 of 4: Summary

[Attachments \(1\)](#)

*Business Unit Entered Datetime 09/24/25 4:23PM
LSU New Orleans Employee BU Request ID

*Invoice Number

*Invoice Date

*Cost Sub-Total

[Other Cost](#)

Total Amount 523.82

*Currency

Description

Notes/Comments

Step	Action
4.	Payment Request - Save For Later <u>PAT - Upgraded</u> Click the Save For Later link. Save For Later

Training Guide

Payment Request Enhancements

✕ Exit
Payment Request
LSU Health Financials PAT

1
Summary

2
Supplier

3
Invoice Details

4
Review and Submit

Next >

Step 1 of 4: Summary

📘
Attachments (1)

*Business Unit

LSUNE

LSU New Orleans Employee BU

*Invoice Number

1256

*Invoice Date

09/24/2025

*Cost Sub-Total

523.82

Other Cost

Total Amount

523.82

*Currency

USD

Description

Notes/Comments

Please enter information below:
Payee Name:

90 characters remaining

Entered Datetime 09/24/25 4:23PM

Request ID 0000043774

Step	Action
5.	Payment Request - Save For Later <u>PAT - Upgraded</u> NOTE: A green bar displays at the top of the page stating the save is in progress. When completed, the Payment Request number is provided. Click the Exit button. ✕ Exit

Training Guide

Payment Request Enhancements

< My Financials Home

Payment Request Center

LSU Health

Financials PAT

All - 06/26/25 to 09/24/25

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Request ID	Entered Datetime	Invoice Number	Description	Supplier ID	Supplier	Total Amount	Currency	Request Status	Scheduled to Pay	Business Unit	Voucher ID	Payment Method
0000043774	09/24/2025 4:23PM	1256		9999999999		523.82	USD	New		LSUNE		
0000043770	09/24/2025 3:29PM	1245	Test for documentation	9999999999		102.00	USD	Cancelled		LSUNE		
0000043769	09/24/2025 3:27PM	1245	Test for documentation	9999999999		102.00	USD	Cancelled		LSUNE		

Step	Action
6.	Payment Request - Update <u>PAT - Upgraded</u> The <i>top line</i> is always the most <i>recent</i> request. Select the Payment Request you wish to continue with by <i>clicking</i> anywhere on the <i>desired line</i> .

Training Guide

Payment Request Enhancements

Payment Request Center
Payment Request
LSU Health Financials PAT

Attachments (1)

Summary Information

Business Unit
LSUNE
LSU New Orleans Employee BU

Invoice Number
1256

Invoice Date
09/24/2025

Total Amount
523.82 USD

Description

Notes/Comments
Please enter information below: Payee Name:
Address: Emplid (LSUHSC direct deposit):
Personal Email(for non-employee direct deposit):
Message to appear on payment:

Entered By

Entered Datetime
09/24/2025 4:23PM

Request ID
0000043774

Request Status
New

Payment Handling

Separate Payment
No

Payment Message

Supplier Information

Supplier ID
9999999999

Supplier

Payment Address

Update
Cancel
Copy

Step	Action
7.	Payment Request - Update <u>PAT - Upgraded</u> To continue working on the <i>Payment Request</i> , the user <u>must</u> scroll to the <i>bottom</i> of the <i>Summary Page</i> and select the Update button .

Training Guide

Payment Request Enhancements

Payment Request

Financials PAT

1 Summary 2 Supplier 3 Invoice Details 4 Review and Submit

Next >

Step 1 of 4: Summary

Attachments (1)

*Business Unit Entered Datetime 09/24/25 4:23PM
LSU New Orleans Employee BU Request ID

*Invoice Number

*Invoice Date

*Cost Sub-Total

Total Amount 523.82

*Currency

Description

Notes/Comments Please enter information below:
Payee Name:
90 characters remaining

Step	Action
8.	Payment Request - Update <u>PAT - Upgraded</u> The system will <i>default</i> the user onto the Payment Request page at <i>Step 1 of 4: Summary</i>. The Save For Later option can be <i>utilized as often as needed</i>.

Training Guide

Payment Request Enhancements

Payment Request Center
Payment Request
LSU Health Financials PAT

Attachments (1)

Summary Information

Business UnitLSUNE
LSU New Orleans Employee BU

Entered By
Entered Datetime09/24/2025 4:23PM

Invoice Number1256

Request ID0000043774

Invoice Date09/24/2025

Request StatusNew

Payment Handling

Separate PaymentNo

Payment Message

Total Amount523.82 USD

Description

Notes/CommentsPlease enter information below: Payee Name:
Address: Emplid (LSUHSC direct deposit):
Personal Email(for non-employee direct deposit):
Message to appear on payment:

Supplier Information

Supplier ID9999999999

Supplier

Payment Address

UpdateCancelCopy

Step	Action
9.	Payment Request - Copy <u>PAT - Upgraded</u> Users may <i>copy</i> an <i>existing Payment Request (PR)</i> to <i>create</i> a <i>new</i> one. To perform this action, the user will <i>select</i> the Payment Request tile and then <i>search</i> for the <i>desired Payment Request</i> . At the <i>right end</i> of the <i>Payment Request list</i> , select the <i>arrow</i> to view the <i>PR</i> . Then, <i>once in the PR</i> , <i>scroll down</i> to the <i>bottom</i> of the page. <i>Select</i> the <i>Copy</i> button.

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Payment Request Enhancements

The screenshot displays the 'Payment Request' window in the Financials PAT system. The top navigation bar includes an 'Exit' button and the title 'Payment Request'. The main header shows 'Financials PAT' with a menu icon. A progress bar at the top indicates four steps: 1. Summary, 2. Supplier, 3. Invoice Details, and 4. Review and Submit. Steps 2 and 4 are highlighted with green boxes. A 'Next >' button is located to the right of the progress bar.

Step 1 of 4: Summary

Attachments (1)

*Business Unit: LSUNE (LSU New Orleans Employee BU)

Entered Datetime: 09/24/25 4:23PM

Request ID

*Invoice Number: 1256

*Invoice Date: 09/24/2025

*Cost Sub-Total: 523.82

Other Cost

Total Amount: 523.82

*Currency: USD

Description

Notes/Comments: Please enter information below. Payee Name: 90 characters remaining

Step	Action
10.	Payment Request - Copy <u>PAT - Upgraded</u> <i>All the data will be copied into the new PR EXCEPT the Supplier ID and the Attachments. The user then updates the date, invoice number, supplier, amounts and attachments to complete and submit the PR.</i>
11.	*****WARNING***** Payment Request - Cancel <u>PAT - Upgraded</u> The Cancel button works as a DELETE button. Cancel cannot be undone. If the user selects the Cancel option, a <i>cancellation confirmation message</i> will be displayed.

Training Guide

Payment Request Enhancements

Step	Action
12.	*****WARNING***** Payment Request - Cancel <u>PAT - Upgraded</u> If the user wishes to Cancel the payment request, s/he will select OK. If the user does not wish to Cancel the <i>Payment Request</i>, s/he will select the <i>Cancel</i> button to <i>return</i> to the Payment Request page. In this example, the OK button is <i>selected</i>.
13.	*****WARNING***** Payment Request - Cancel <u>PAT - Upgraded</u> The user is <i>returned</i> to the <i>Payment Request Center</i>, and the <i>payment request</i> displays a <i>Request Status</i> of Cancelled.
14.	This completes <i>Payment Request Enhancements</i>. End of Procedure.