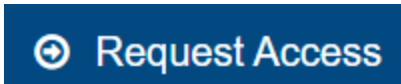


The purpose of this process is for UTRGV employees assigned as Reconcilers to get access to submit an expenditure correction via an AP journal voucher. Employees given the Reconciler responsibility after August 2, 2023, are required to submit an access request.

1. Log into my.utrgv.edu
2. Access the IT Support Center application.



3. Click on **Get Access!** from the Popular Services menu.
4. Click on the Request Access button.



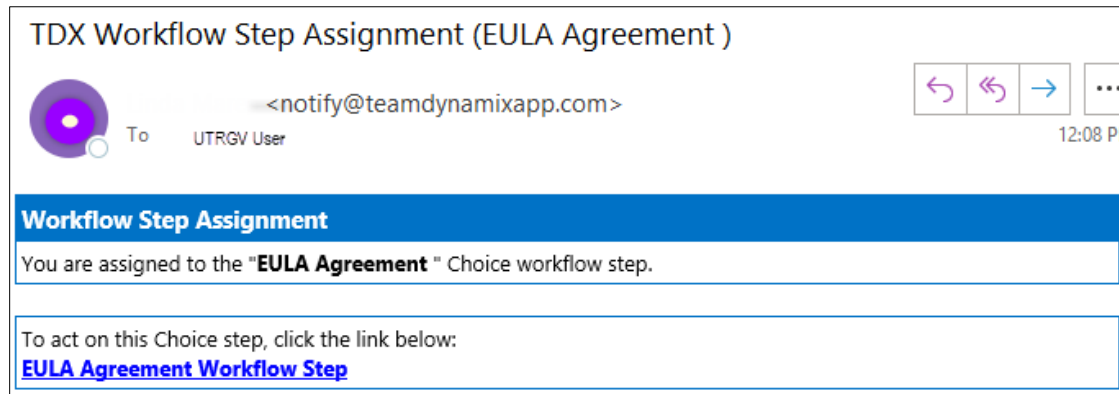
5. Select **PeopleSoft-Financials** from the Category menu.
6. Select **PeopleSoft-Accounts Payable** from the Resource menu.
7. Select **RECONCILER** from the PeopleSoft-Accounts Payable role.
8. In the description field, enter the purpose for your request:  
Example: Requesting access to submit AP journal vouchers in PeopleSoft for expenditure corrections.  
Please include the EMPLOYEE NAME and EMPLOYEE ID NUMBER.
9. Click the Request button.

**Sample of Completed Request:**

The screenshot displays the 'The University of Texas Rio Grande Valley' client portal. The navigation bar includes links for Home, Information Technology, University Police, Medicine, Research, Projects, Services, and Knowledge Base. The form is titled 'Requestor' and includes a search bar for the client portal. The 'Requester' field is labeled 'REQUESTER NAME'. The 'Category' dropdown is set to 'PeopleSoft - Financials'. The 'Resource' dropdown is set to 'PeopleSoft - Accounts Payable'. Under 'PeopleSoft - Accounts Payable Roles', the 'Reconciler' role is selected with a checked checkbox. The 'Description' field contains the text: 'Requesting access to submit AP journal vouchers in PeopleSoft for expenditure corrections. Please include employee NAME and EMPLOYEE ID NUMBER'.

This will trigger an email containing the EULA Agreement Workflow Step to the user email address.

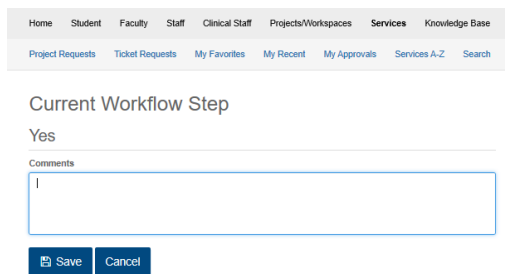
10. Use the link provided to login.



11. Click **Yes** in agreement with the terms and conditions. If you do not agree, click **NO**.  
(clicking NO will terminate the access request).

The screenshot shows the UTRGV Information Technology portal. The header includes the UTRGV logo and "Information Technology". There is a search bar and a dropdown menu. The main navigation bar includes links: Home, Student, Faculty, Staff, Clinical Staff, Projects/Workspaces, Services, Knowledge Base. Below this is a secondary navigation bar with links: Project Requests, Ticket Requests, My Favorites, My Recent, My Approvals, Services A-Z, Search. The main content area is titled "Current Workflow Step" and "Service Request Details". It shows a "Service Request" with ID "15528997" and a link "Access Request". The "Description" is "Access to AM queries in RPT environment". Below this is the "Choice Step Details" section, which shows the "Step" as "EULA Agreement" and "Assigned To" as "Linda Mares". At the bottom, there is a "Description" section with a paragraph of text: "If this request form is being submitted to obtain access to federally-protected student data as defined by the U.S. Department of Education under the Family Educational Rights and Privacy Act (FERPA) of 1974, it is with the understanding that both the immediate supervisor and employee gaining access fully recognize that only data pertinent to the employee's scope of responsibilities is to be utilized, and abuse of this access is considered a violation of FERPA. Under no circumstances is protected student data to be shared or discussed with individuals who do not have a documented legitimate educational interest in the student data being accessed." Below this is a "EULA Agreement" section with a link "Please visit https://www.utrgv.edu/it/policies/index.htm" and a statement: "I have read and accept all UTRGV Policies, Standards and Guidelines, and I furthermore understand that violation of these can result in disciplinary actions that may impact my employment status." On the right side of the form, there are two large buttons: "Yes" (with a checkmark) and "No" (with a checkmark). Below these is a "Requestor" field.

12. Click **Save**. This will update the EULA status and push the workflow to employee supervisor followed by the module owner(s).



Home Student Faculty Staff Clinical Staff Projects/Workspaces **Services** Knowledge Base

Project Requests Ticket Requests My Favorites My Recent My Approvals Services A-Z Search

Current Workflow Step

Yes

Comments

|

Save Cancel