

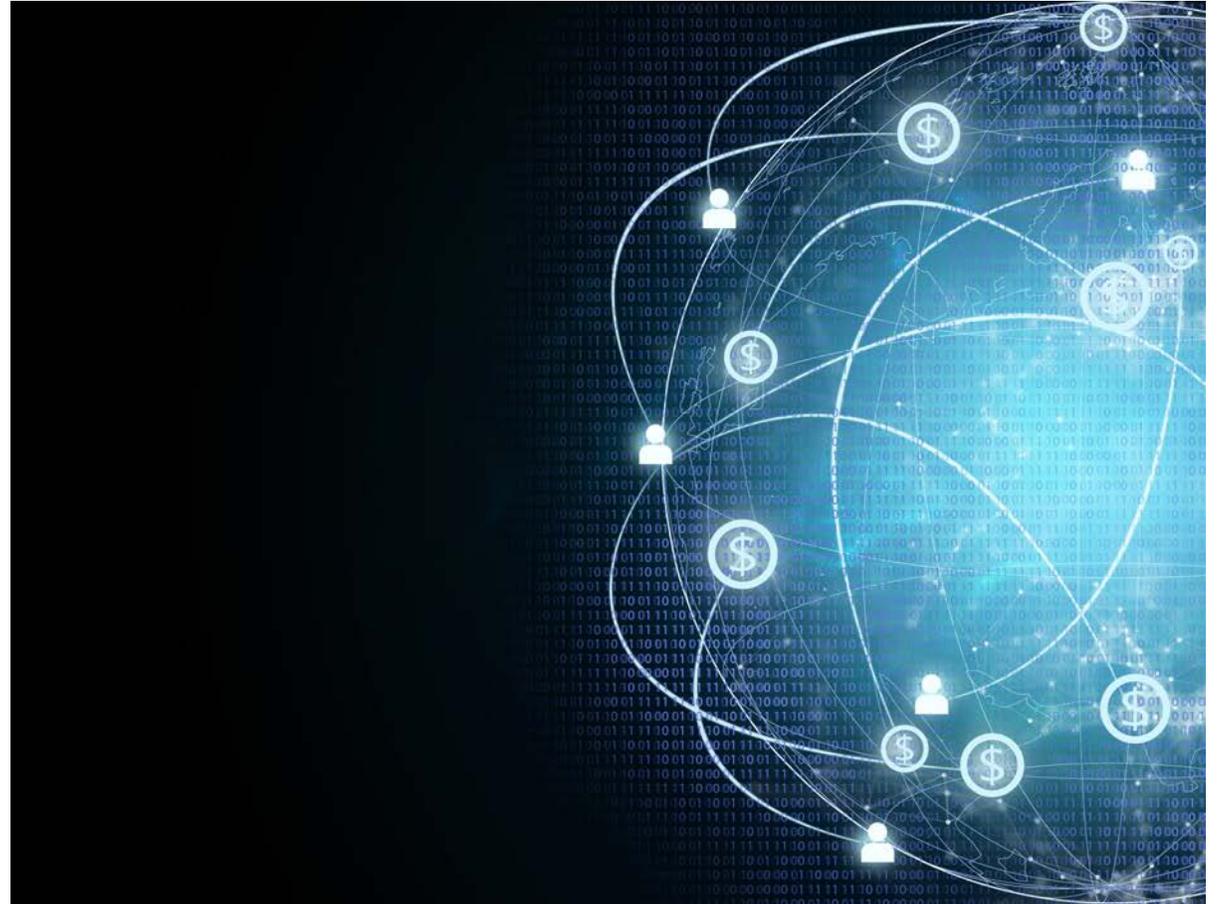


Reinventing Reimbursements

An Overview of MIT's New Request for Payment (RFP) Tool

New Request for Payment (RFP) Tool

- Modernizes reimbursement and small-dollar payment processes using Atlas and B2P
- Streamlines submission processes
- Optimizes approval workflows



Key Benefits of the New Tool

Security

Reduces vulnerability to cyberattacks

Simplicity

Unified, streamlined experience within Atlas and B2P

Efficiency

Enables quick payment via direct deposit

Transparency

Full visibility into payment approval and transmission status

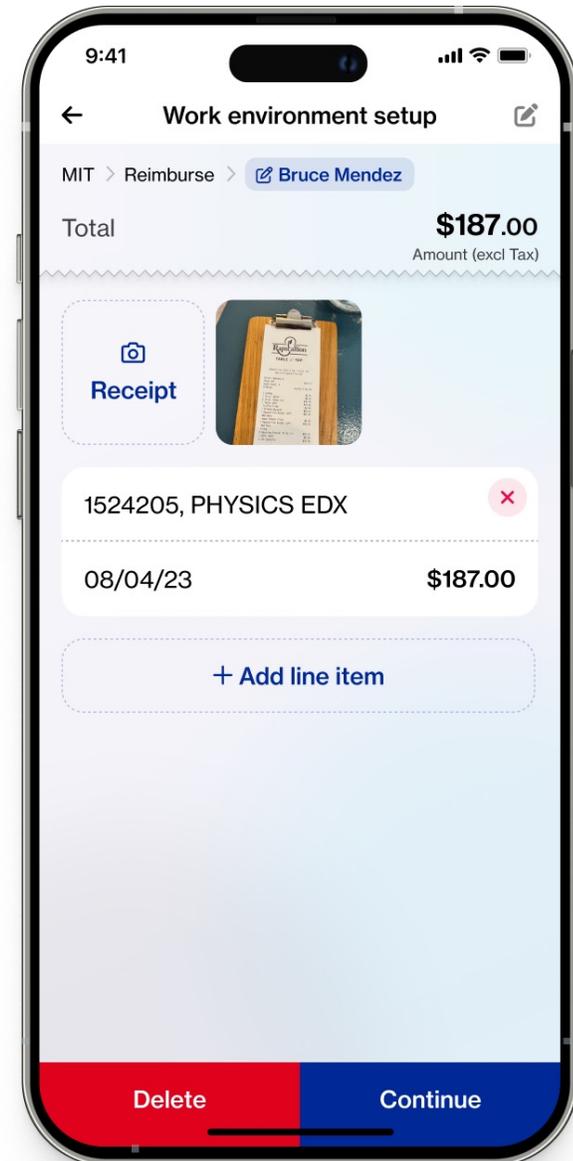
Security and Compliance

- All internal supplier information stored and maintained in Atlas (students and employees)
- External supplier information (individuals, incorporations, etc.) are stored within Supplier Information Management (SIM)
- All approvers and approval chains visible in B2P
- SIM will streamline payments made by direct deposit and decrease check processing, including returns, stops and reissues
- Payee and work information will determine appropriate tax withholdings



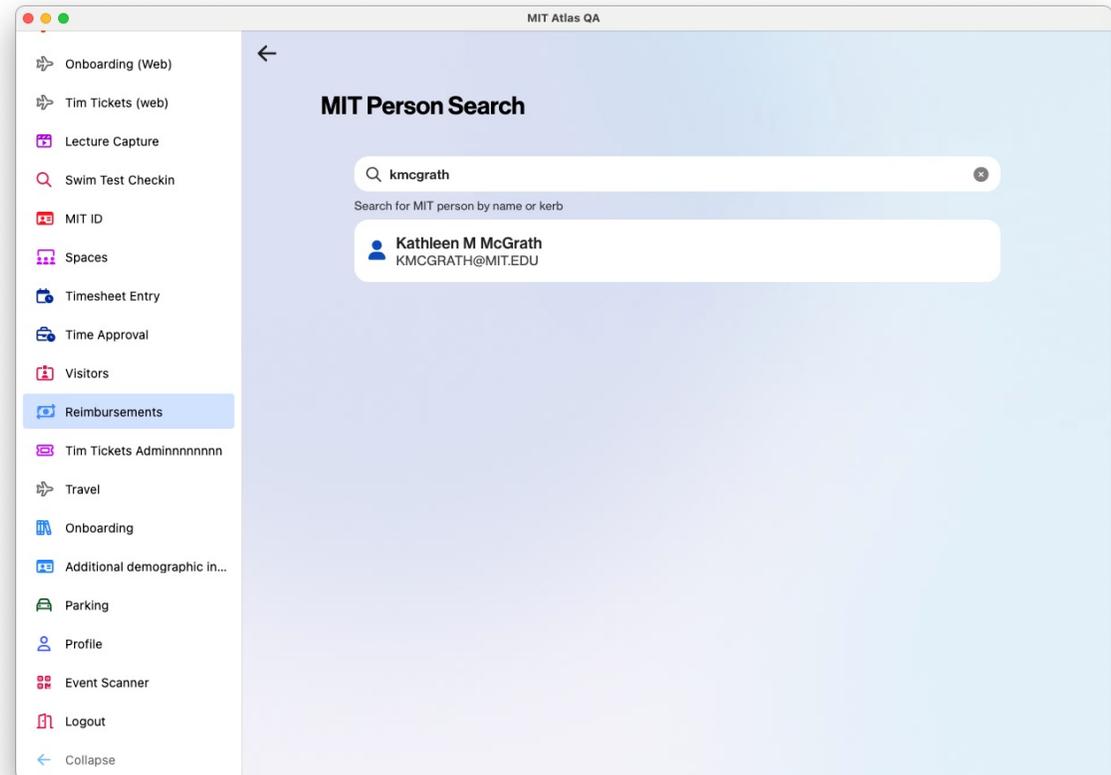
Simplicity

1. Access Atlas app on desktop (Windows/iOS) or mobile (Android/iPhone)
2. Attach/upload photo of receipt or other documentation
3. Assign cost object(s) and submit for approval



Simplicity

- Find payees and approvers by name, email, or Kerberos account
- Type-ahead functionality allows users to find cost objects and GL accounts by name or number
- Split billing can be automatically added between cost objects



Efficiency

Payee designates preferred payment/reimbursement method

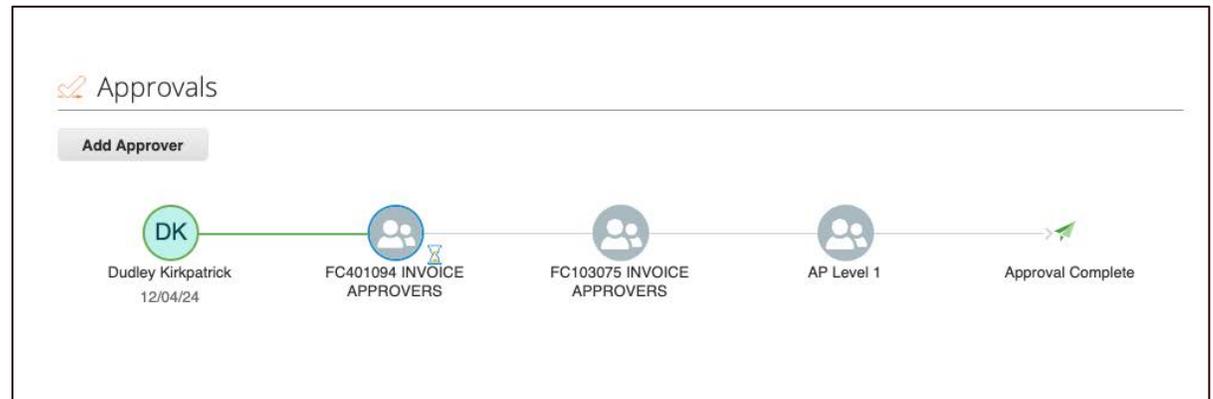
- Direct deposit
- Paper check
- International payments made by wire

Payments deposited into payee's account or sent via check



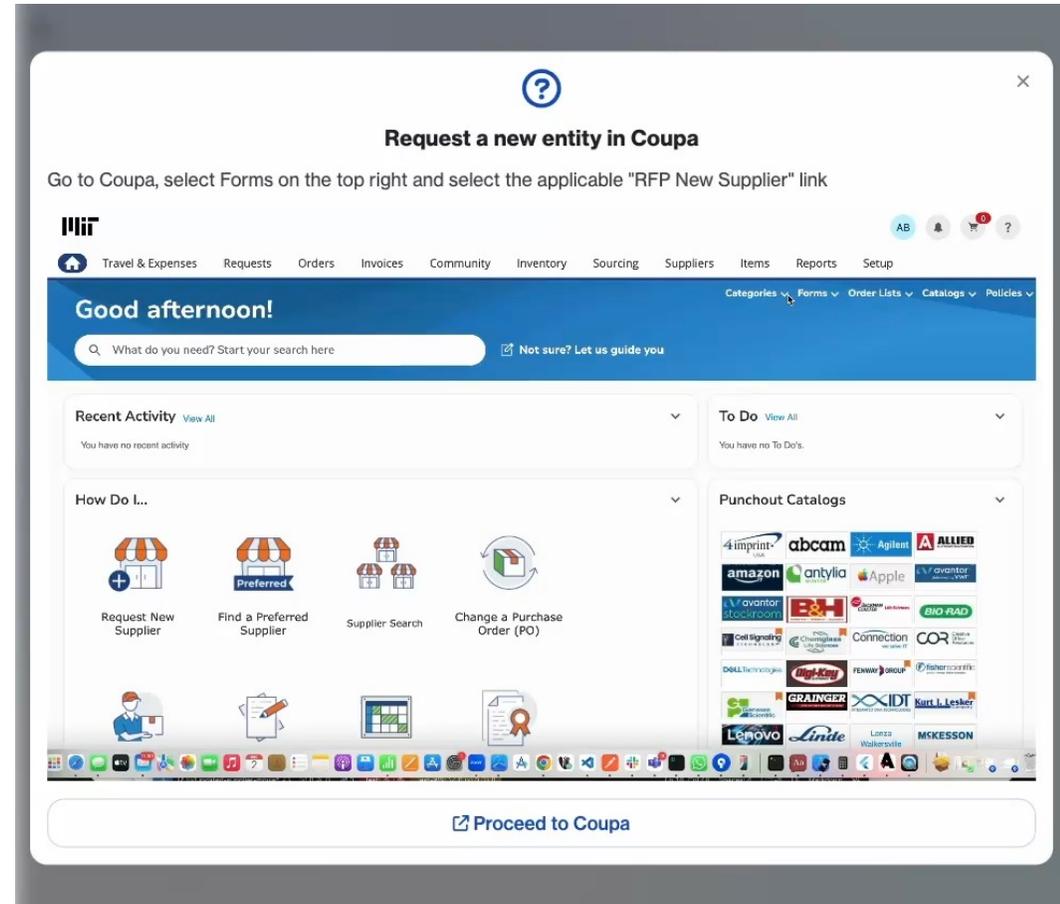
Transparency

- Requesters can view current RFP status
 - In Progress (Draft & Pending Review)
 - Processed within Last Month (Submitted, Approved, Declined, and Paid)
- All approvers and approval chains visible in B2P



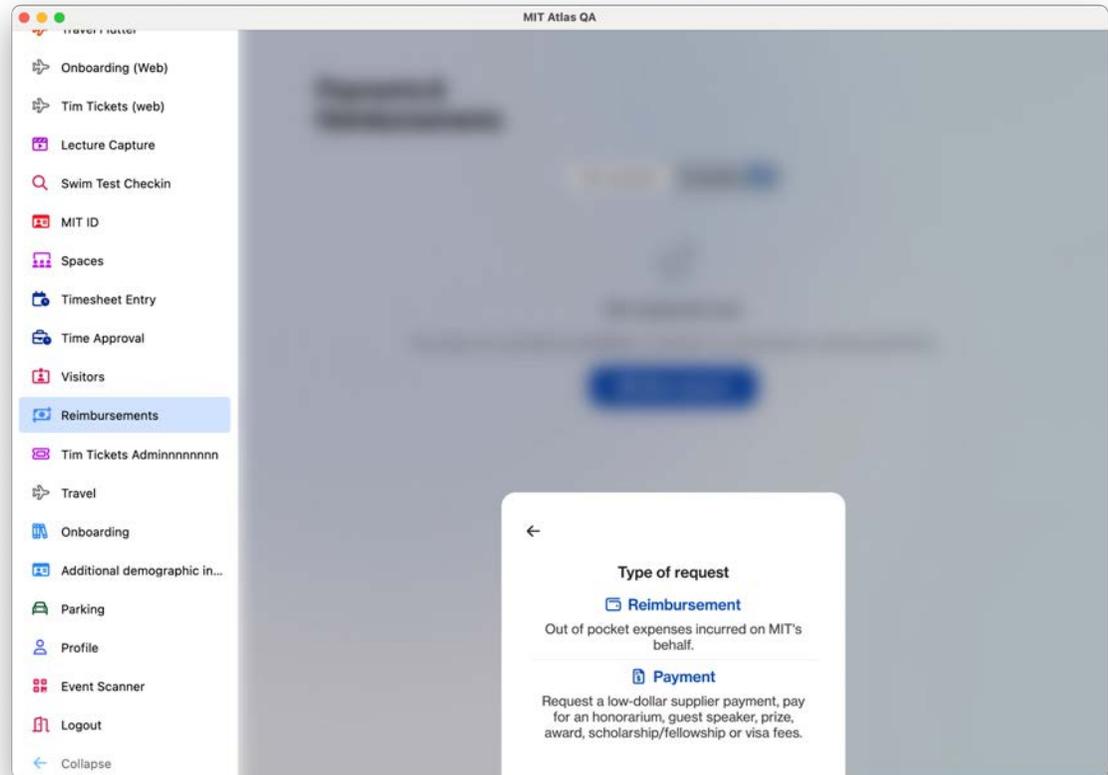
Adding a Payee

1. Proceed to Coupa to add an external supplier.
2. Under **Forms**, click **New RFP Supplier**.
3. Fill in required supplier contact information.



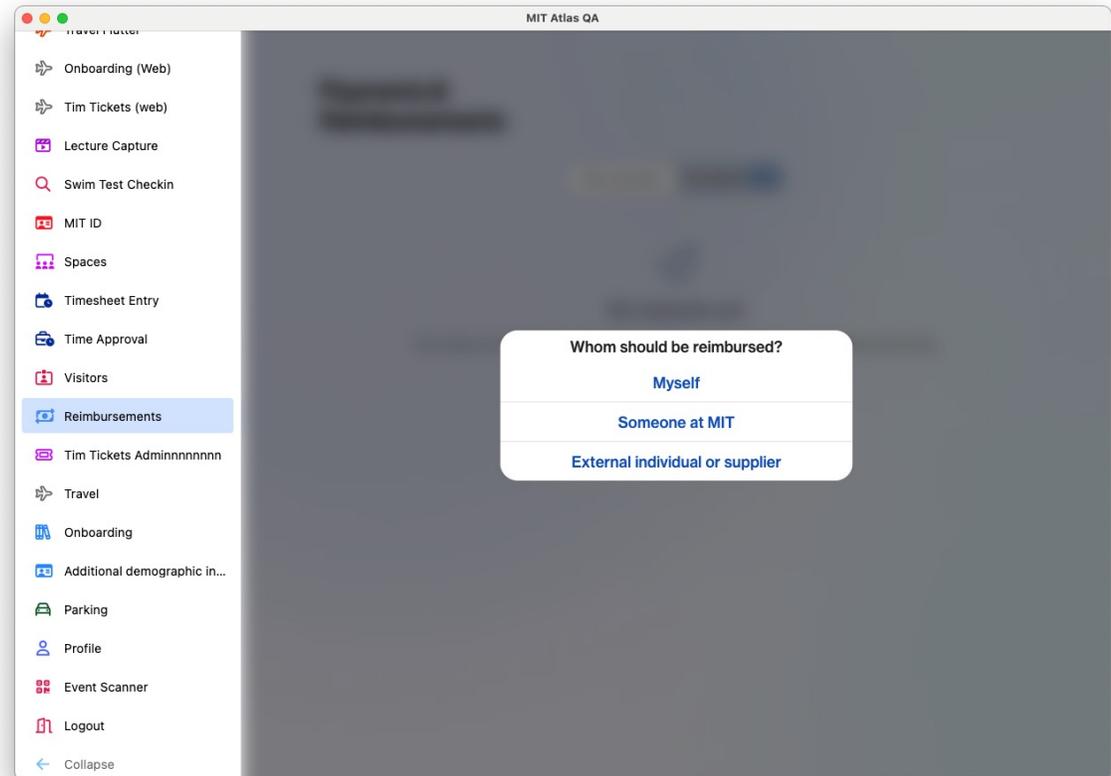
Submitting a Request

1. Is this a reimbursement or payment?
2. Is the request being made for yourself, someone else at MIT, or an external supplier?



Submitting a Request

1. Is this a payment or a reimbursement?
2. Is the request being made for yourself, someone else at MIT, or an external supplier?



Submitting a Request – Services

3. Add payee information

- Is the payee a citizen of the United States?
- Was the work/activity performed in the United States? In Massachusetts?
- Select default payment method or make an exception (hold check at Accounts Payable office)

MIT Atlas QA

Payment Information [Continue](#)

✓ Payee Information

Tuloy G QzZiin
DMCCOOL@MIT.EDU

Is the payee a US citizen or a resident alien? No Yes

✓ About the Work

If work was performed in multiple states or countries, please submit a separate payment request for each location.

Was the service/activity performed online? No Yes

Was the service/activity performed inside the U.S.? No Yes

Was the service/activity performed in Massachusetts? No Yes

✓ Payment

Supplier payment method is **Direct Deposit** based on their payment preference set up in MIT's Financial Systems

Hold check for pickup at Accounts payable office

If you need to make an exception to the current payment method for this RFP ONLY, provide an explanation for Accounts Payable to review and approve.

Onboarding (Web)
Tim Tickets (web)
Lecture Capture
Swim Test Checkin
MIT ID
Spaces
Timesheet Entry
Time Approval
Visitors
Reimbursements
Tim Tickets Adminnnnnnn
Travel
Onboarding
Additional demographic in...
Parking
Profile
Event Scanner
Logout
Collapse

Submitting a Request

4. Add a line item

- Date
 - Amount
 - Business purpose
 - Cost object
 - General ledger (G/L) account
- Be sure to exclude state sales tax (MA + 29 other states)
 - Type-ahead functionality allows G/L and CO searches by name or number
 - Split across multiple accounts/objects if needed

MIT Atlas QA

Continue

Line item

Date: 12/04/24 Amount: \$ 1,000.00

Business Purpose: Copyediting Services

Split accounts

GL	Cost Object	Amount
420226 - Materials and Services	1444211 - MISCELLANEOUS - HQ - N	50.00 % \$ 500.00
420226 - Materials and Services	1633504 - HR/PAYROLL - HR PAYROLL - N	50.00 % \$ 500.00

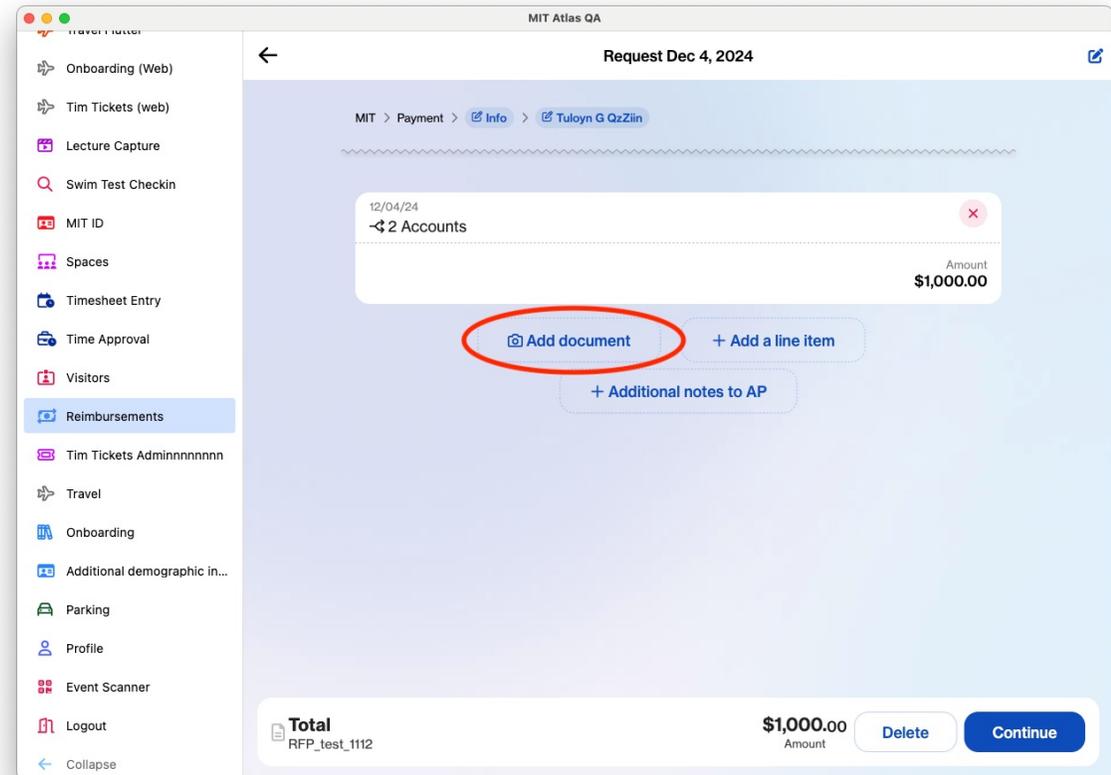
+ Add a split

Submitting a Request

5. Attach a receipt and/or other documentation

Accepted file formats:

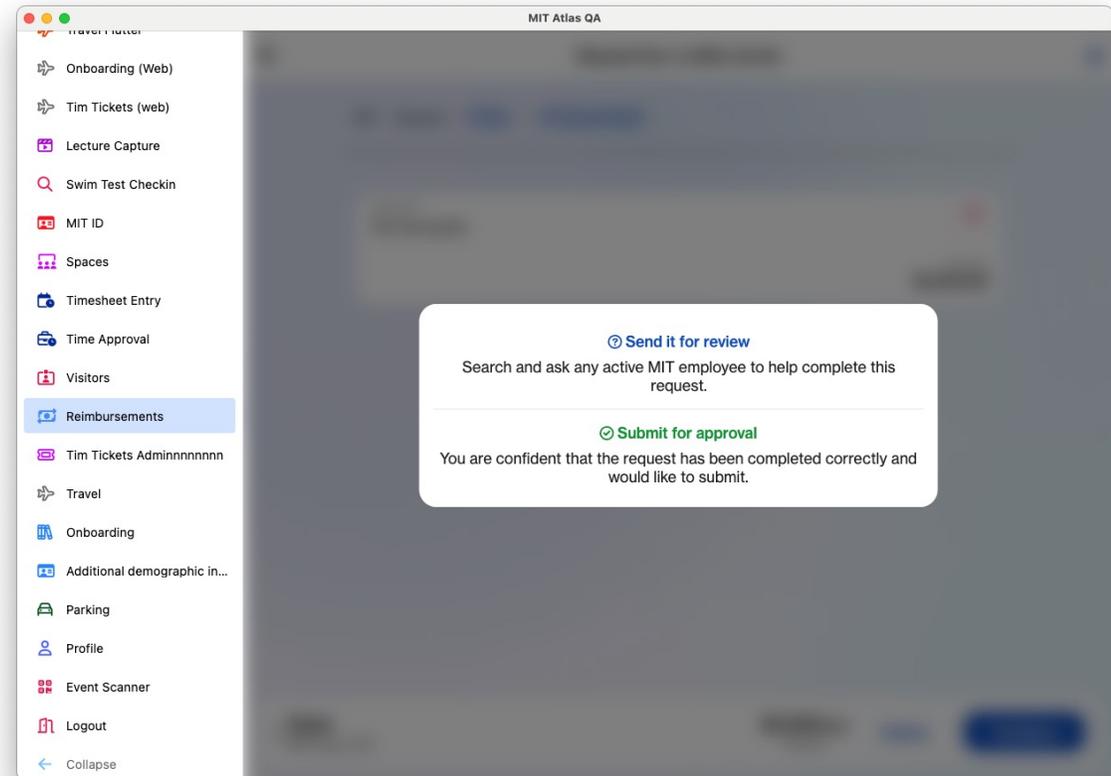
- PDF
- JPG
- PNG
- HEIF & HEIC (phone image files)



Submitting a Request

6. Submit for approval

- Search for approver by name, Kerberos account, or email
- Send to a reviewer first for help completing the request



Approving a Request

1. Access invoices under **Activity** (top right) or **To Do** (right)

The screenshot displays the MIT procurement system interface. At the top, the user is identified as 'Cynthia Vye (NE-49-4161) acting as KATHLEEN KM'. The navigation menu includes 'Requests', 'Orders', 'Invoices', 'Community', 'Inventory', 'Sourcing', 'Suppliers', 'Items', 'Reports', and 'Setup'. A search bar is present with the text 'What do you need? Start your search here' and a link 'Not sure? Let us guide you'. The main content area is divided into several sections:

- Recent Activity:** A list of recent transactions with details such as 'Coupa on using their APFs.' (17,000.00 USD), 'Pricing on Quote, 1 Vault by Pelican - V770 Multi-Purpose Hard Case ...' (8,139.95 USD), 'ABBY & NICE License Fee (Year 1), NICE, Implementation Cost (Year ...' (773,025.00 USD), '1 TRU RED 1-Subject Notebooks, 8" x 10.5", College Ruled, 70 Sheets...' (5.30 USD), and '1 HP 950XL 951 Black High Yield, Cyan/Magenta/Yellow Standard Yiel...' (94.41 USD).
- To Do:** A list of pending actions, including 'Invoice #RFP_test_1078 is rejected', 'Invoice #RFP_test_1077 is rejected', 'Invoice #RFP_test_1075 is rejected', 'Invoice #RFP_test_1073 is rejected', and 'Invoice #RFP_test_1070 is rejected'. Each item has 'Hide' and 'Review' buttons.
- Punchout Catalogs:** A grid of logos for various suppliers, including Imprint, Abcam, Agilent, Allied, Amazon, Antylia, Apple, Avantor, Bio-Rad, Cell Signalling, ChemGenex, Connection, COR, Digi-Key, Fisher Scientific, Grainger, Lenovo, McKesson, Mueller-Cable, NuPage, Newark, OTC, Rainin, Red Thread, Roche, Staples, Takara, ThermoFisher, Thomas Scientific, Thorlabs, and USA.

Two purple arrows point to the 'Activity' dropdown menu in the top right corner and the 'To Do' section header in the middle right area.

Approving a Request

2. View invoice via
Activity >
Invoices >
Requiring My Approval

The screenshot displays a software interface for managing invoices. The top navigation bar includes 'Community', 'Inventory', 'Sourcing', 'Suppliers', 'Items', 'Reports', and 'Setup'. Below this, a sub-menu shows 'Requisitions', 'Orders', 'Order Changes', 'Invoices', 'Receipts', 'Forms', 'Process Requisitions', 'ASNs', 'Inbox', and 'Tasks'. The 'Invoices' menu item is selected. Below the sub-menu, there is a filter bar with 'Export to', 'View' (set to 'Requiring My Approval'), 'Advanced', and a search field. The main content area is a table of invoices with the following columns: Invoice #, Supplier, Net Due Date, Total, Status, Delivery Method, and Actions. The table contains 15 rows of test data, all with a status of 'Pending Approval'. A purple arrow points to the 'Invoices' menu item, another points to the 'Requiring My Approval' filter, and a third points to the first row of the table.

Invoice #	Supplier	Net Due Date	Total	Status	Delivery Method	Actions
RFP_test_1110	Kevin Lyons	12/04/24	1.23	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1109	Jeffrey Francis Rosa	12/01/24	500.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1106	Jeffrey Francis Rosa	12/01/24	110.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1105	Qolyfju Dofuti	11/30/24	110.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1101	SHAWN JONES	12/25/24	19.50	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1067	Joanie Edmonds	11/23/24	500.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1059	JEFF UK	12/18/24	25,500.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1063	JOHN UK	12/15/24	8,250.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1062	MIKE ACH	12/15/24	575.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1056	Kevin Lyons	11/16/24	1.23	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1041	Kevin Lyons	11/04/24	21.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1040	JOHN JACO PUBLISHING	11/29/24	11,700.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1029	Cindy Vye	10/26/24	74.38	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1026	Tuffyl Nyjoy	10/26/24	500.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]
RFP_test_1022	Kevin Lyons	10/22/24	25.00	Pending Approval	Integration (API)	[Pencil] [Refresh] [Check] [Close]

Approving a Request

3. Review the invoice to edit, approve, or reject.

If you reject, an explanation is required.

The screenshot displays an invoice approval interface. At the top, the status is 'Pending Approval'. Key details include: Payment Due Date: 12/01/24; Supplier Note: None; Attachments: Integration_Data.json, Work_Info.pdf, and Payment_Info.pdf; Invoice From: No address selected; Ship From: No address selected; Supplier Tax ID: None; Image Scan: None; Requester: None; Facilities Tracking Code: None; If Subrecipient, click if high risk: No; SAP FI Document #: None; SAP Invoice #: None. A summary bar shows a Total of 500.00 USD. A comment field contains the text 'Required to reject'. Below the comment field is a row of action buttons: Edit, Restart Approvals, Withdraw, Apply Tax Codes, Dispute, Reject, and Approve. A 'Bypass Approvals' button is also present. At the bottom, the invoice details are: Invoice #RFP_test_1109 | Jeffrey Francis Rosa (0070011293) | 11/26/24. A checkbox for 'Open next document' is checked.

Questions?

Contact **MIT Accounts Payable**

b2p@mit.edu

617-253-7000