SCE Service Center of Excellence

ServiceNow for Fulfillers Travel/Reimbursements

All Pay Invoice request are processed and tracked in ServiceNow. To access the ServiceNow fulfiller portal go to https://uncch.service-now.com

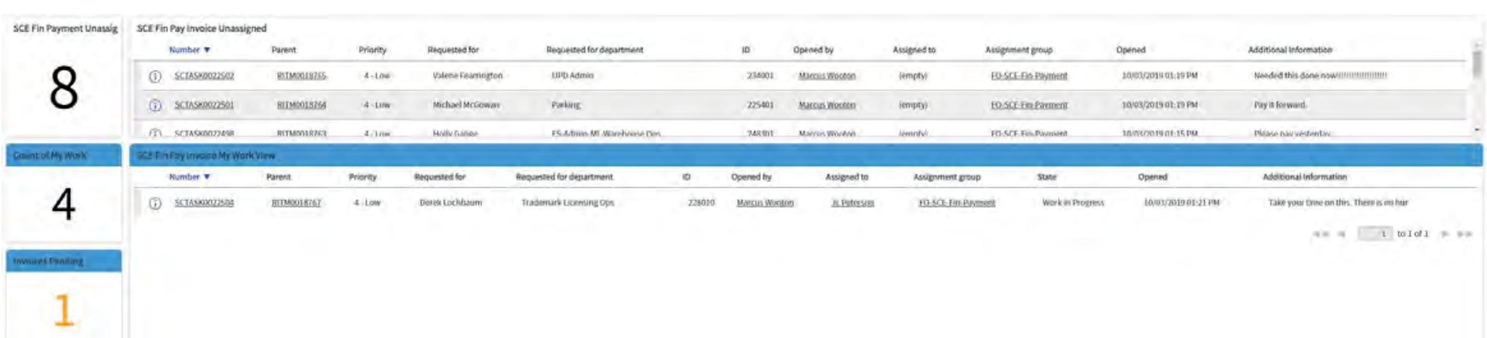
Reviewing Requests

All requests will come into ServiceNow as unassigned. To review unassigned and assigned requests follow the steps below.

- Open ServiceNow Fulfiller portal
- Login with ONYEN and password
- Using Duo Two Step Authentication to complete login (first time daily)
- Review unassigned requests in the **“Unassigned Travel”** section
- Your assigned requests will be displayed in the **“My Work”** section in any of the following ways:
  - Assigned requests to you by you
  - Assigned requests to you by our team members
  - Assigned requests to you by anyone outside of our team
- All assigned requests to the travel team will be in the **“Travel Group Work”** section

Assigning Requests

- Review unassigned requests in the **“Unassigned Travel Group Work”** section
- Assign any requests from customers for whom you are responsible:
  - Double click in the **“Assigned To”** field for the associated Task
  - In the Search box that appears, type the name to assign (i.e. John Doe)
  - Click on the correct name that appear in the list under the box
  - Click on the green Check Mark to save the change
- Review the **“Additional Information”** column for customer directed importance
- If priority change is needed:
  - Double click in the **“Priority”** field for the associated Task
  - Using the drop-down box that appears, choose the appropriate Priority to match Customer Request
  - Click on the green Check Mark to save the change
- Once done, click on the **Refresh button in your browser** to refresh the whole page
- The Task will now move from Unassigned to the Correct Assigned list(s)



To view a list of unassigned tasks click the number [8]. To view a list of your assigned tasks click the number [4].

Processing Travel and Expense Requests

- Navigate to Team Dashboard (if not loaded on dashboard)
- Review all requests (previous section)
- Go to the **"My Work"** section to process request(s) in order of importance
- Click on the link in the **"Parent"** column to open the Request Item (**RITM#####**)
- Change the Request Item State to **"Work in Progress"**
  - At the top on the right hand side of the header click **"State"**
  - From the drop-down box, choose **"Work in Progress"**
  - Click on the Hamburger menu in the upper left to select save.
- Review the customer submitted information in the gray section to view chartfield strings and account information.
- Below the gray section in the customer comments write to the customer that you have begun processing this request and will be in touch if additional information is required.
- Write any notes relevant to processing the ticket in the work notes comment box. Be sure to uncheck customer visible!
- Review the **"Additional Information"** from Customer that could affect processing
- If a priority change is needed:
  - Double click in the **"Priority"** field for the associated Task
  - Using the drop-down box that appears, choose the appropriate Priority to match Customer Request
  - Click on the green Check Mark to save the change
- Approvals
- Review the **"Account Information"**
- At the top, in the **"Manage Attachments"** heading, click on the name of the attachment and open the document
- If Request has additional supporting documentation, open all documents as well

Travel Authorization

- Review the attached documentation for the reimbursement request.
  - If additional information or documents are required, message the customer by entering a comment into the customer visible comment box.

Payment

- Login to ConnectCarolina in a new window
  - This will allow ServiceNow and ConnectCarolina to both be visible
- Enter the reimbursement into ConnectCarolina.
- Submit the reimbursement to central office.
- In the request item header in ServiceNow change the status to "**Pending**"
- When disbursed record the disbursement number in the Payment Number field.
- Share the disbursement number with the customer in the comment box in ServiceNow.

Closing Requests

- At the bottom of the Request Item, find the SCTASK for the request in the Catalog Tasks box
- Double click in the **"State"** field
- From the drop-down box, choose **"Closed-Complete"**
- Click on the green Check Mark to save the change
- Click on the Old Well logo in the top left to navigate back to the Dashboard

On your Desktop

- Delete submitted invoice and any documentation from your Desktop. The attachments in ServiceNow should never be removed/deleted from the request.