How to Submit a Bank of America Statement on Self-Serve

On the SUNY iPage, click on the Self-Serve quick link.

Log in with user name and password.

Select the applications drop down menu. Click on purchasing.

Click on Create a New RF Purchase Requisition.

Self-Serve will automatically populate with your name and contact information.

In the top section, fill out the following information:

PTA – Select the project/task/award you wish to use.

Dept – Use the drop down menu to select your department.

Building – Use the drop down menu to select the building.

Room – Type in the room number.

Attention – Type in the full name of the card holder.

Scroll to the bottom and select the Save button

In the middle section, fill out the following:

Supplier		Address	
City		State	⌄	Zip	
Phone		Fax		SSN/FedID	

Pricing: ○ Verbal ○ Internet ○ Catalog ○ Other | Date: [ ] 🗓 | Quote # [ ]

Comments: [ ]

Attachment: [ ] Browse... (You can attach additional documents after submittal)

Supplier – Bank Of America

Comments – Month of Visa statement (Example: January Visa Statement)

Attachment – Use this to upload all documentation and receipts.

Scroll to the bottom and select the Save button

In the bottom section, fill out the following:

Catalog #	Description	Quantity	Unit	Price	Total
					0.00
		0		0.99	0.00
		0		0.99	0.00
		0		0.99	0.00
		0		0.99	0.00

If you need to add more items to this purchase requisition, update requisition after creating record.   Total: [ ]

* Required Fields

[Reset] [Save]

Catalog number: Project/Task/Award only if using more than one for the month.

Description: Vendor and purchase information. (Example: Amazon textbooks)

Quantity, unit, and price – Fill this out exactly as it shows on the Bank of America statement. (Example: 1 each $19.99).

When everything is complete, change requisition status to READY TO APPROVE or APPROVE (if available).

Scroll to the bottom and select the Save button

At this point, the requisition is sent to the approving authority.

Once approved, the requisition will be assigned to the Visa Administrator, who will audit.