

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

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

The screenshot shows the SUNY Upstate Medical University website. At the top, there is a navigation bar with the Upstate logo and the text "State University of New York Inside Upstate". Below this is a menu with links for HOME, ALL STAFF, STUDENTS, FACULTY, RESEARCHERS, HEALTHCARE PROVIDERS, and ADMINISTRATORS. Underneath the menu is a section titled "iPage" with a sub-section "Inside Upstate". This section contains three promotional banners: "COMMUNITY GIVING CAMPAIGN", "WITH DISTINCTION", and "UPSTATE WHAT'S UP AT UPSTATE". Below the banners is a section titled "Upstate Intranet" which contains a grid of icons for various services. A red arrow points to the "SELF SERVE" icon in the grid. Other icons include Upstate Directory, BlackBoard, Help Desk, Policies & Forms, My Upstate, Library, EPIC, Calendar, CC LINKS, Groupwise, Clinical Launch Pad, Finding Your Way, Kronos, MyAccounts, Upstate Foundation, and Physical Plant Service.

Log in with user name and password.



Self-Serve Login

With Self-Serve, you can review administrative information about yourself and update some of that data online. In addition, at the discretion of your supervisor, you can be given access to additional functions and reports depending on your responsibilities.

Log in using your Upstate Network Account's username and password.

If you've forgotten your password, call the IMT Help Desk at 464-4115.

Username

Password

Login

[First Time User?](#) | [Reset 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.

 Purchase Requisition

[Purchasing Home](#) | [RF Online Requisitions Home](#) | [Insert New Requisition](#)

Select Project-Task-Award (PTA) First Requisition Status: IN PROGRESS

* PTA **Shipping:**
 Split? This Dollar Amt: \$0.00 Need_Date Regular Shipping

Created By Phone * Dept
Contact Phone * Building
E-mail List * Room
* Attention

Supplier Address
City State Zip
Phone Fax SSN/FedID

Pricing: Verbal Internet Catalog Other | Date: | Quote #

Comments:

Attachment: (You can attach additional documents after submittal)

Catalog #	Description	Quantity	Unit	Price	Total
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>

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

* Required Fields

In the top section, fill out the following information:

Select Project-Task-Award (PTA) First Requisition Status: IN PROGRESS

* PTA **Shipping:**
 Split? This Dollar Amt: \$0.00 Need_Date Regular Shipping

Created By Phone * Dept
Contact Phone * Building
E-mail List * Room
* Attention

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	<input type="text"/>	Address	<input type="text"/>		
City	<input type="text"/>	State	<input type="text"/>	Zip	<input type="text"/>
Phone	<input type="text"/>	Fax	<input type="text"/>	SSN/FedID	<input type="text"/>
Pricing:	<input type="radio"/> Verbal <input type="radio"/> Internet <input type="radio"/> Catalog <input type="radio"/> Other Date: <input type="text"/> Quote # <input type="text"/>				
Comments:	<input type="text"/>				
Attachment:	<input type="text"/>	<input type="button" value="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
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text" value="0.99"/>	<input type="text" value="0.00"/>
If you need to add more items to this purchase requisition, update requisition after creating record.					Total: <input type="text"/>

* Required Fields



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).



[Purchasing Home](#) | [Insert New Requisition](#)

A screenshot of a web-based requisition form. The form includes several input fields: "PTA" (Project-Task-Award) with a dropdown menu, a "Split?" checkbox with a dollar amount field, "PTA (Split)" with another dropdown, "Shipping:" with a red arrow pointing to a dropdown menu, "Need_Date" with a date picker, "Dept" with a dropdown, and "Building" with a dropdown. The "Requisition Status" dropdown menu is open, showing options: "IN PROGRESS" (highlighted in blue), "READY TO APPROVE", "APPROVED", "REVIEWING", "ORDERED", and "PAID".

****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.