Please see A-Z list of Task names below to see what action is required

Requisitions for approval

Either:

Approve the order allowing the requisition to continue in workflow.

Reject back to the requisitioner with reason/s stated.

Park if you need time to review, you will then need to approve/reject once you review is completed.

**Budget Holder: >£10k VAT exempt REQ**: You have received this task because the order contains lines coded to medical research VAT exempt tax codes (PM), is over £10k and you are the budget holder. The order requires your approval to continue in workflow to fulfilment. Please review the order checking the use of VAT exempt codes and authorising the >£10k spend.

**Budget Holder: >budget VAT exempt REQ**: You have received this task because the order contains lines coded to medical research VAT exempt tax codes (PM), the order is over budget and you are the assigned budget holder on the sub-project. The order requires your approval, it will then be workflowed to the Head of School/Division for senior approval.

**Budget Holder: Over budget REQ**: You have received this task because the order is over budget and you are the assigned budget holder on this sub-project. The order requires your approval, it will then be workflowed to the Head of School/Division for senior approval. Please review the order, checking that the details are correct, and that the over spend can be funded.

**Budget Holder: Over Budget SEF REQ**: You have received this task because the order is allocated to a SEF project, is over budget and you are the assigned budget holder on this sub-project. The order requires your approval, it will then be workflowed to the Head of School/Division for senior approval. Please review the order, checking that the details are correct, and that the over spend can be funded.

**Budget Holder: REQ Approval**: You have received this task because the order is over £10k and allocated to a sub-project for which you are the budget holder. The order requires your approval to continue to Head of School/Division approval. Please review the order checking that the details are correct.

**Budget Holder: SEF project REQ**: You have received this task because the order is allocated to a SEF project for which you are the budget holder. The order is >£10k and once approved will be escalated to the Head of School/Division. Please review the order checking that the details are correct.

**DoF >£50k: Contract REQ**: You have received this task because the order is over £50k and requires your approval as the Director of Finance. To help your review the requisitioner/approvers may have added supporting documents and comments. To view documents, click on the paperclip icon in the top right of screen, to view comments look at the workflow log on the task screen. Please review the order checking that the details are correct. The Procurement approval step is complete so contract detail/justification should be populated in the comments workflow log and contracts/relevant documents should be attached (click on Paperclip in top right hand side of the screen).
**Estates: SEF Project REQ:** You have received this task because the order is allocated to a SEF Project for which you are the assigned “Estates” approver. To help your review the requisitioner/approvers may have added supporting documents and comments. To view the documents, click on the paperclip icon in the top right of screen, to view comments look at the workflow log on the task screen. Please review the order checking that the details are correct and either:

**H&S: Hazardous Product REQ:** You have received this task because the order contains hazardous/radioactive products which require your health and safety approval. To help your review the requisitioner/approvers may have added supporting documents and comments. To view the documents click on the paperclip icon in the top right of screen, to view comments look at the workflow log on the task screen. Please review the order checking that the details are correct.

**HoS/D: >£10k SEF project REQ:** You have received this task because the order is allocated to a SEF project, is >£10k and you are the assigned Head of School/Division. The order has been reviewed and approved by Estates and the Budget holder but requires your approval to be fulfilled. Please review the order checking that the details are correct.

**HoS/D: >£10k VAT exempt REQ:** You have received this task because the order contains lines coded to medical research VAT exempt tax codes (PM), is over £10k and you are the Head of School/Division for this sub-project. The order has been approved by the budget holder and now requires your approval to continue in workflow to fulfilment. Please review the order checking the use of VAT exempt codes and authorising the >£10k spend.

**HoS/D: Over budget REQ by more than £100:** You have received this task because the order is over budget by more than £100 and you are the Head of School/Division for this sub-project. The order has been approved by the budget holder and now requires your approval. Please review the order, checking that the details are correct, and that the over spend can be funded.

**HoS/D: Over budget REQ Over 10k:** You have received this task because the order is over budget and is for £10k or more and you are the Head of School/Division for this sub-project. The order has been approved by the budget holder and now requires your approval. Please review the order, checking that the details are correct, and that the over spend can be funded.

**HoS/D: Over budget REQ PM by more than £100:** You have received this task because the order contains lines coded to medical research VAT exempt tax codes (PM), and is over budget by more than £100, and you are the Head of School/Division for this sub-project. The order has been approved by the budget holder and now requires your approval. Please review the order, checking that the details are correct, and that the over spend can be funded.

**HoS/D: Over budget REQ PM Research:** You have received this task because the order contains lines coded to medical research VAT exempt tax codes (PM), and is for Research sub-project, and you are the Head of School/Division for this sub-project. The order has been approved by the budget holder and now requires your approval. Please review the order, checking that the details are correct, and that the over spend can be funded.
**HoS/D: Over budget REQ raised by BH** : You have received this task because the order is over budget and it was raised by the Budget Holder for this sub-project. The order has been approved by the budget holder and now requires your approval. Please review the order checking that the details are correct and that the over spend can be funded.

**HoS/D: Over budget REQ Research** : You have received this task because the order contains lines coded to a Research sub-project, and you are the Head of School/Division for this sub-project. The order has been approved by the budget holder and now requires your approval. Please review the order checking that the details are correct and that the over spend can be funded.

**HoS/D: Over budget SEF REQ by more than £100** : You have received this task because the order was allocated to a SEF project, is over budget by more than £100 and you are the Head of School/Division for this sub-project. The order has been approved by the budget holder and now requires your approval. Please review the order, checking that the details are correct, and that the over spend can be funded.

**HoS/D: Over budget SEF REQ Over 10k** : You have received this task because the order was allocated to a SEF project is over budget and is for £10k or more and you are the Head of School/Division for this sub-project. The order has been approved by the budget holder and now requires your approval. Please review the order, checking that the details are correct, and that the over spend can be funded.

**HoS/D: Over budget SEF REQ raised by BH** : You have received this task because the order was allocated to a SEF project, is over budget and was raised by the Budget Holder on this sub-project. The order has been approved by the budget holder and requires your approval to be fulfilled. Please review the order, checking that the details are correct, and that the over spend can be funded.

**HoS/D: Over budget VAT Exempt REQ raised by BH** : You have received this task because the order contains lines coded to medical research VAT exempt tax codes (PM), and was raised by the Budget Holder and you are the Head of School/Division for this sub-project. The order now requires your approval. Please review the order, checking that the details are correct, and that the over spend can be funded.

**HoS/D: REQ Approval** : You have received this task because the order is over £10k and is allocated to a sub-project for which you are the Head of School/Division. The order requires your approval to be fulfilled. Please review the order checking that the details are correct.

**Procurement Check: REQ Approval** : You have received this task because the order is over £25k and requires Procurement approval. To help your review the requisitioner/approvers may have added supporting documents and comments. To view documents, click on the paperclip icon in the top right of screen, to view comments look at the workflow log on the task screen. Please review the order checking that the details are correct and that the appropriate procurement controls have been followed. To see documents attached to the requisition click on the paperclip icon in the top right of the screen. Please add contract details in the comments field and attach contracts/relevant documents using the paperclip icon to aid subsequent approval steps and provide a complete audit trail. If the order does not require a contract, please explain in the comments and select the appropriate approval step.

**REQ Approval** : You have received this task because the order is allocated to a sub-project for which you are the primary approver. The order requires your approval to continue to fulfilment. Please review the order checking that the details are correct.
REQ Approval: Vat Exempt: You have received this task because the order contains lines coded to medical research VAT exempt tax codes (PM) and you are the . The order requires your approval to continue in workflow to fulfilment. Please review the order checking that the use of VAT exempt codes and order details are correct.

SEF Approval: SEF product REQ: You have received this task because the order contains special SEF products which require your approval. To help your review the requisitioner/approvers may have added supporting documents and comments. To view documents, click on the paperclip icon in the top right of screen, to view comments look at the workflow log on the task screen. Please review the order checking that the details are correct.

Senior Fin >£50k: REQ: You have received this task because the order is over £50k and requires your approval as the Director of Finance or member of Senior Management (if over £750k). To help your review the requisitioner/approvers may have added supporting documents and comments. To view documents, click on the paperclip icon in the top right of screen, to view comments look at the workflow log on the task screen. Please review the order checking that the details are correct. The Procurement approval step is complete so contract detail/justification should be populated in the comments workflow log and contracts/relevant documents should be attached (click on Paperclip in top right hand side of the screen).

Requisitions that require Amending

(Substitutes are not able to amend Requisitions, only the Requisitioner can Amend)

Rejected REQ
Rejected REQ: Description error
Rejected REQ: PO Destination error
Rejected REQ: SEF
Rejected REQ: SEF Product error
Rejected REQ: SEF Supplier error

*SEF = Sussex Estates & Facilities
*DoF = Director of Finance