

# Approve a Lump Sum Request Form

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An email will be sent to all approvers at each level when a form has been submitted and is awaiting approval.

**NOTE:** These steps do not apply to the employee approval.

**WARNING:** The form will open in a new tab. If the form does not open, enable pop ups from this site.

## Access the Forms

Notifications to approve the form is sent to all approvers and back up approvers at a specific level. If a form is no longer selectable on the Approver page or the email link does not automatically open to the form, it means that another approver has already approved the form at this level.

1. Click the link in the email. –OR–
2. Sign into [my.wisconsin.edu](https://my.wisconsin.edu)
3. Click the dropdown list in the upper left corner and switch to **Manager Self Service**.
4. Click the **Approvals** tile.
5. Select the form to Approve.
6. Review the form.  
**NOTE:** Budget Approvers – Review and update Funding Entry as needed.
7. Click **Next**.
8. Review the Approval Acknowledgments section and click the slider bar next to *Approval Acknowledgment* to **Yes**.
9. Add an attachment, optional.
  - Click **Upload**.
  - Click **My Device**.
  - Select the file to upload.
  - Click **Upload**.
  - Click **Done**.
  - Select an option from the drop down for **Description**.
  - Enter a description in the second **Description** field, optional.
10. Enter any comments in the Comments section.
11. Select the appropriate button to complete the form:
  - a. **Deny** – Form is not approved and no longer needed.
  - b. **Pushback** – Form needs additional information or updates made by the Requestor. An email is sent to the requestor.
  - c. **Approve** – Form is complete and approved. An email is sent to the next approver.
  - d. **Print** – a copy of the form will open in a new tab and can be printed.
12. The *Form Results* page will provide details about where the document is in the review process.

13. To review additional Lump Sum forms:
  - Click **Return to Search** button.
  - Select the hyperlink for the first form.
  - Review and approve the form.
  - Click **Next**.

### View/Print an Approved Form

A form is available for view after approval is complete.

1. Click the link in the email. –OR–
2. Sign into [my.wisconsin.edu](https://my.wisconsin.edu)
  - Click the dropdown list in the upper left corner and switch to **Manager Self Service**.
  - Click the **Approvals** tile.
  - Click the **Home** icon in the upper right.
  - Click the dropdown arrow in the middle of the page next to Employee Self Service and select UW Requests Homepage.
  - Click Lump Sum Request.
3. Select the **View Lump Sum Request** tab in the left sidebar.
4. Enter search criteria and click **Search**.
5. Review the form and the comments at the bottom of the page.
6. Click **Next**.
7. To see approver details, click the **View Approval Route** button to see all completed and pending approvers or click the arrow next to *Signature/Action Logs* to see completed approvals.
8. Click **Print**.
9. In the *Report Name* field, select **Report**.
10. Click **Print** and the form will open in a new tab.
11. Click the **Printer Icon** to print the document.
12. Close the tab when finished.
13. Click **Done**.