UC Benefit Bank
Approver Quick Start Guide

Reporting the benefit being delivered through professional sourcing and procurement activities
GETTING STARTED

❖ ACCESS THE BENEFIT BANK
Use the hyperlink below to access the Benefit Bank:

https://procurementbenefit.ucop.edu/

❖ ADD TO FAVORITES OR BOOKMARKS
Add the Benefit Bank page to your Favorites or Bookmarks for easy access!

❖ APPROVER USER NAME AND PASSWORD
Approvers will receive an email containing login (email address) and temporary password. Click the Forgot Password link to change your password.

❖ SYSTEM TIME-OUT
The system will time-out after one hour of inactivity.

❖ BROWSER COMPATIBILITY
Benefit Bank is compatible with Internet Explorer, Firefox and Chrome.

❖ GET HELP
As an approver, you are the first line of support for your submitters. If you cannot resolve the issue, or if technical support is needed, please contact:

SUPPORT@UCPROCURE.ZENDESK.COM
**MY APPROVER QUEUE**: The dashboard will default to display all items in the Approver queue. Select any one of the status buttons to filter the list by:

- Pending My Approval
- Returned
- Resubmitted
- Approved
- Rejected

**MY PROXY QUEUE**: If serving as a proxy for another Approver, select the My Proxy Queue hyperlink to access their items.
**REVIEW BENEFIT:** Click the 📝 icon to review a benefit and take the appropriate action.

**MANAGE YOUR QUEUE:** Select any of the column headers to sort the items in your queue.
1) **REVIEW BENEFIT**: Validate all pertinent details including activity, supplier, benefit amount, baseline amount, etc.

2) **BENEFIT NOTES**: If supplier added notes to the item before submitting, you will be able to review them here.

3) **ORGANIZATIONAL UNITS**: Review the org units, benefit types and amounts.
4) **REVIEW ATTACHMENTS:** Click the “view” hyperlink to review the benefit documentation.

5) **COMMENTS:** This is an optional field. If you enter a comment, click **Save**. A record of all comments is retained in the benefit record.

6) **ACTIONS:** Select one of the following actions (described in detail on the following pages):
   - Approve Benefit
   - Return Benefit
   - Reject Benefit
   - Reassign Benefit
**APPROVE BENEFIT:** When you select this button, a dialog box will appear where you can include an *Optional Approval Note* for the buyer.

- Once approved, the benefit will be visible in the buyer’s queue in Approved status.

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**RETURN BENEFIT:** When you select this button, a new page will open where you can identify the specific Benefit section that needs to be corrected or clarified, and enter the reason(s) for the return.

- The **Return Benefit** page will contain checkboxes next to each benefit field. When the **Error?** checkbox is selected, a text box will open for you to enter **Error Notes**.
- Continue your review, checking the box for any errors and entering error notes. It is a best practice to identify all errors on a single return.

- When your review is complete, click Return Benefit.

- A dialog box will appear confirming the errors identified. You can include an Optional Return Benefit note for the buyer.

- Once returned, the benefit will be visible in the buyer’s queue in Returned status.
**REJECT BENEFIT:** When this button is selected, a dialog box will appear where you must enter Reject Benefit Notes for the rejection.

Once rejected, the benefit will display in the buyer’s queue as rejected and no further action can be taken.

**REASSIGN BENEFIT:** Select this action when you want transfer responsibility of the benefit to another approver.

Once reassigned, a dialog box will appear asking you to confirm the reassignment and enter *optional* notes for the assignee.