Payment Request Workflow Release – FAQ

1. Is the Classic Workflow going away?
    a. Currently, we do not have any plans to sunset Classic workflow. Our initial priority is to launch the new workflow to additional objects and expand automations, then we'll assess adoption and feedback as we define a longer-term roadmap for workflow.
2. Can I have two different payment requests from the same Grant/Award enrolled in the same workflow?
    a. Yes.
3. If an Action is assigned to a Department, do all Department members will receive an email notification?
    a. Yes
4. Can users approve a Payment Request bypassing the workflow?
    a. The following user roles can approve a Payment Request by not enrolling into workflow:
        i. Account Admin and Editor, Award Admin and Editor, Department Admin and Editor, Funder Manager and Additional Users.
    b. To prevent this from happening, Account Admins can add the following *User Role Restrictions* to the roles above to avoid bypassing approvals via workflow:
        i. Navigation: Administration > System Security > Users > Click on User > Add Restrictions: Approvals
5. Can I see payment request actions assigned to me via Activity > Workflows?
    a. This will be available by 5/30/25
6. Is it possible to set up any new payment request associated with an Award/Grant to be automatically assigned to a workflow?
    a. Not at this point, however we've noted this as an idea for a future enhancement
7. How can I reject an already approved Payment Request?
    a. An Admin can move a Payment Request back a step or back to start, then the record can be moved to a Rejection step.
    b. Navigation: From Payment Request > Workflow Admin tab > Record Management

8. Can automatic email notifications triggered by workflow be recalled?
    a. No
9. Can I approve a Payment Request if required fields are incomplete?
    a. Currently you can. We are adding required field validation by 7/4/25.
10. Are there due dates for workflow? (Instead of just notifications)
    a. Not for Actions without a task automation. We have planned releases for review task, generic tasks, and eSignature task which will have options for a due date.