

DE 315

Authorization for Individual Services (PBS)

What you will learn today:

- **What is the PBS**
- **When not to use the PBS**
- **How the PBS routes for approval**
- **How to access the PBS**
- **Learn the general screen composition of the PBS document and POINT Plus**
- **How to navigate through the PBS**
- **Find out how to get more information / help**

What you will NOT learn today:

- Policy & Procedures

For a class on AIS Policy & Procedures
please see:

DE 316 – AIS/APS/PBS –
Authorizing Individual Services

What is the PBS?

- **The PBS is the new electronic document for the Authorization for Individual Services (AIS).**
- **The PBS document will replace the current paper-based Authorization for Professional Services (APS) form.**

Why is it called the PBS?

- The electronic AIS is called the PBS because the electronic document is hosted by POINT Plus.
- All POINT Plus electronic documents begin with P**. Examples: PBO, PB3, PB4

PBS Information

- The PBS is currently only being used for approval of services.
 - No transactions are generated
- Eventually the PBS will encumber funds and have a corresponding payment document to disencumber and pay.
- The vendor identification number of the individual performing the services must be entered at the time the document is created.

When not to use the PBS

- A Contract & Grants (26) account must be used.
- Payment will be made to a foreign visitor (non-U.S. citizen) with no SSN or US taxpayer number (ITIN).
- There is no fee payment and only expense reimbursements are authorized (Reminder: You should continue to use a VE5/VP5 to authorize expense reimbursements when no fee is to be paid).
- A blanket APS is needed or preferred for multiple individuals' fee payments, direct billing authorizations, or expense only reimbursements.

How the PBS routes for approval

- PBS routing is similar to travel document routing.
- Requests for UT employees will route to the unit of the employee's largest percentage appointment account for approval.
- It will then follow the routing of the account the services are to be paid from.
- The document then routes to the appropriate Dean/VP routing.

Additional information about routing

- The PBS audits for prior payments.
- If a request for services causes an individual to exceed the \$25,000 threshold the document will automatically route to the Provost Office after it is approved by the Dean/VP.

How to Access the PBS:

- What you will need:
 - Internet Browser (IE, Firefox, Safari)
 - A UT EID
 - A Mainframe Logon ID
 - A Desk/View in *DEFINE with at least V status command authorizations for the PBS command.

How to Access the PBS:

- The PBS document is accessible through POINT Plus
 - <https://utdirect.utexas.edu/pointplus/>



Important Things to Know

- The Vendor must sign the “Approved” printed copy of the PBS Summary page.
 - Summary page must fit onto 1 page.
- An Employee/ Independent Contractor Classification Checklist must be submitted.
- A *TXMAIL message is sent to the creator upon final approval of the PBS document.

How to get additional information / help

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- Wednesday August 2, 2006
8:30 a.m.-noon

How to get additional information / help

Online Information Help

- PBS Online Help
http://www.utexas.edu/business/accounting/web/help/pbs_info.html
- PBS Demo Library
http://www.utexas.edu/business/accounting/web/help/pbs_demo.lib.html
- PBS Frequently Asked Questions
http://www.utexas.edu/business/accounting/tr/pb_sfaq.html

How to get additional information / help

For questions about PBS authorizations, access, or document creation/approval:

- Office of Accounting Helpline
(512) 471-8802 or oa.askme@austin.utexas.edu

How to get additional information / help

For questions about PBS policies or procedures:

- Contractor Services
(512) 471-7820 or shall@austin.utexas.edu
- Payroll Services
(512) 471-5271
- Office of the Executive Vice President and Provost:
Ask Carla!
<http://www.utexas.edu/provost/about/askcarla/index.html>

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Office of Accounting
Education & Training

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