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

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

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

How to get additional information / help

Online Information Help
• PBS Online Help
• PBS Demo Library
• 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
DE 315
Authorization for Individual Services

Office of Accounting
Education & Training