

Campus Organizations Accounting- Clover Flex Device Request

Clover Flex card readers may be borrowed by Campus Organizations to accept in-person payments by credit card. Because there are a limited number of devices to be shared by all organizations, the Clover Flex may be borrowed for no more than 3 business days, and scheduled check out and return times must be adhered to. The guide below shows how a treasurer can make a request to borrow a device.

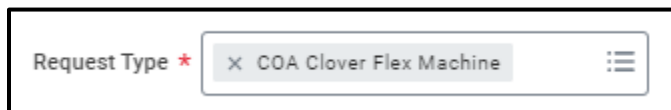
Initiating the Request

The treasurer will:

1. Log to Workday
2. Access *Create Request* through either the *Requests* application icon on the Global Navigation menu (red arrow below), or by searching for the task “create request” in the search bar.



3. Select *COA Clover Flex Machine* in the list of requests, or type “clover flex” in the *Request Type* box.



The request form will appear. All fields are required. A list of the fields with detailed descriptions of what to put in each is below:

Describe the Request: Please add a short description of the reason the request is needed.

Overview of Payment Card Security Procedures: Review the policies

COA Rental Policy and Terms: Review the policies

Student Organization Name: Write in your organization name with no abbreviations

Student Org Program Worktag: Write in your organization Program Worktag in the format “PGXXXXXX”

Date the device will be picked up: Use the calendar to identify a date in the future

Time the device will be picked up: Select a time from the list

Date the device will be returned: Use the calendar to identify the date the device will be returned

Time the device will be returned: Select a time from the list

Describe Your Event: Please describe what your organization is selling, and the event tied to the sale

Date the Event Begins: Use the calendar to identify the date your event or sale begins

Treasurer email and phone number: Please list both the email and phone number of the requestor

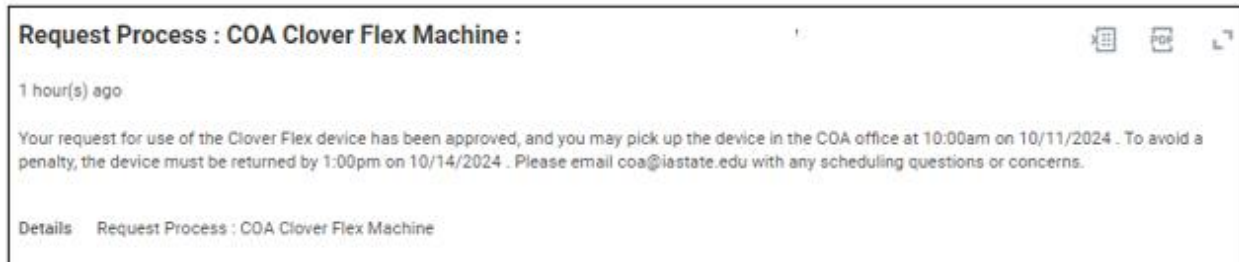
Name of Advisor: Write in the name of the organization advisor who should approve this request if needed. If you have more than one advisor, please only write in one name, as only one advisor will approve the request.

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Request Routing and Approvals:

Once submitted, the request will route to:

1. The COA student accountants, who will review the form for completeness and accuracy
2. The organization advisor who will approve the request
3. COA manager for final approval and to close the request
4. The treasurer will receive notification when the request is fully approved. The notification will include information from the request about the approved check out and return times.



You may check the status of your request at any time by using the *ISU My Requests* report in Workday.

If your request is sent back for correction or adjustment, you will receive Workday notification, and will be able to see comments and make corrections before resubmitting through your Workday inbox. Any request or transaction that needs correction will be available through the inbox, and will have send back comments at the bottom of the form.

