
PIP Questions and Answers

March 2001

1. What is a PIP and where do they come from?

FMS creates PIPs during the invoicing process to notify the department that a problem exists with a purchasing document that is keeping it from paying. There are two types of PIPs: FYI and FYA.

2. What determines if a PIP is FYI or FYA?

The FMS auditor that creates the PIP decides if it will be FYA or FYI. One can tell if the auditor sent either an FYI or FYA by examining the PIPs routing history using Screen 914. The PIP statuses are also identified in the creator's in-box as either Proposed for FYA, or FYI/Notify.

3. What is an FYI PIP?

FMS auditors create For Your Information PIPs to notify a department's creator to either 1) follow up on a problem or 2) to notify the creator of a change that they have made to a document. For example, the document description said "Office Supplies." This is too general. Thus, FMS has permission to change the description. The PIP might read, "The description is in an incorrect format. In the future be sure to list at least 1 to 2 items for each object code." Other reasons for FYI PIPs include informing the department to do receiving or to have the signer sign the document.

4. How do I get an FYI PIP?

An FMS auditor creates FYI PIPs and sends them to the original creator of the purchase document. If you created a purchase document, then you will be the only person to receive an FYI PIP for that document.

5. Does the FMS auditor control who gets the PIP?

No, the auditor does not control who gets the PIP. Question 4 explains who gets FYI PIPs, and question 10 explains who gets FYA PIPs.

6. How can other creators in my department access my FYI PIP?

The department FAMIS Office Manager will need to place every creator on the Creator Desk using Screen 924. Then, creators may access each other's in-boxes using Screen 911.

7. What should I do with an FYI PIP?

- a. *Never delete a PIP without following up on it.* Read the FYI PIP.
- b. Research/handle the problem.
- c. Delete the PIP from the in-box, but only after you have handled the problem!

Please note: To learn how to follow up on these things in FAMIS, be sure to attend the Purchasing Inquiry class.

PIP Questions and Answers

March 2001

8. How long should I keep an FYI PIP?

DElete the FYI PIP once you know that the problem has been resolved.

9. What is an FYA PIP?

A For Your Approval PIP is in reference to a purchasing document in trouble. FMS will fix the document, but only with the department's approval. *A departmental creator should never recall the purchase document and fix it. He/she should always respond to the FYA PIP, and allow FMS to do it.*

10. The following answer is to all of these questions:

- a. **How do I get an FYA PIP?**
- b. **Why do other creators in my department get my PIPs?**
- c. **I have somebody else's PIP in my in-box! I didn't get my PIP, but everybody else did? Why?**

Everyone on the department's Creator Desk (Screen 924) will get the FYA PIP, and any of these individuals may take action on it. The original purchasing document creator does not have to be the one to do it. After someone handles the PIP, then it will disappear from all creator's in-boxes. *If the department's FAMIS Office Manager does not place individuals on the Creator Desk, then they will not get their FYA PIPs.*

If the PIP is not yours and you do not plan to handle it, then find out who created the purchase document and ask her/him to handle it. Follow these steps to find the original purchase document creator: 1) Open the PIP. 2) Write down the referenced purchase document number (e.g. L100001). 3) Proceed to Screen 914. Type in the 12-character document number (e.g. PLP02L100001) and view the routing history.

11. What should I do with FYA PIPs? I am unable to delete them from my in-box.

Never recall the purchase document and fix it yourself. If you do, then FMS will have no way of knowing, and you will cause a delay in payment. Also, never APP or REJ a PIP just to "get it out of your in-box". If you receive an FYA PIP and it is not one of your PIPs, then ask the appropriate person to handle it. Only then will it disappear from your in-box (unless you handle it).

- a. Select the PIP. Read it by pressing the F6 DSumm key. Decide if you agree or disagree with it.
- b. Use the "NOT" Action to type a note on the PIP document. The note should state what the FMS auditor needs to do to correct the purchase document. If you do not put notes on the PIP, then the auditor will assume that you are approving the changes that they have requested and will make those changes to your document.

PIP Questions and Answers

March 2001

- c. If you agree with the PIP, approve it using the "APP" Action. The PIP will route through your department's routing path and to the FMS auditor who created it. If you disagree with the PIP, reject it using the "REJ" Action.
- d. Next, the FMS auditor will fix the purchase document (e.g., L number) and delete the PIP.

12. How long do I need to keep FYA PIPs in my in-box?

Handle these PIPs immediately. Once you or someone else takes action on them (e.g. APP or REJ), they will disappear from your in-box.

13. What allows someone to create a purchase document?

FAMIS Security gives update access to creator screens. This enables someone to create a document. The department's FAMIS Office Manager needs to add all creators to the Creator Desk (Screen 924) so that the creators will receive their PIPs.

14. How can I check the routing history of a PIP to see who sent it to me and when?

Proceed to Screen 914. Input the 12-character number, e.g. PIP02I805162, and press Enter. (PIP is the document type, 02 is the TAMU campus part, and I805162 is the actual invoice problem number.) The routing history will appear.

15. How can I see if FMS created a PIP for a particular purchase document?

Proceed to Screen 350. Type in the original document number (e.g. L00001). If an * appears in the "PI" column, then a PIP was issued. To read the PIP, select the document to go to Screen 358. Press PF6 to read the PIP information. See Screen 914 to view the PIP routing.

16. How can I tell if a PIP is FYA or FYI?

- a. In your in-box (Screen 910), the FYI status will say "FYI/Notify" and the type will be "N"; the FYA status will say "Proposed," and the type will be "A."
- b. If you know the PIP numbers, go to Screen 914 and look at the routing history. Log on to FAMIS Production and look at these PIPs: FYI PIPs will look like PIP02I100032; FYA PIPs will look like PIP02I907812.

17. How can I search through my in-box (Screen 910) or someone else's in-box (Screen 911) for a particular document without having to scroll through everything?

In the action line, where it says "Form:___," input the document type in the blank and press Enter. Use? help for the different form types (e.g., PIP, PLP, etc.)

PIP Questions and Answers

March 2001

18. I am a back-up creator and the normal creator is on vacation. How can I get access to his/her in-box to take action on rejected documents and FYI PIPs?

Proceed to Screen 911 and type in the person's name, starting with the last name (e.g. Smith, Joe). Press Enter. You must be on the Creator Desk to access the person's documents.

19. How do I inquire on a PIP that is no longer in my in-box?

Proceed to Screen 912, your out-box. Narrow your search by typing PIP for "Form:___." Also, change the "Finished:" N to a Y for all finished documents. The PIP should appear. Place an X next to it, and press the function keys for more information.

20. If I get a PIP that says FMS has cancelled the invoice, does this mean that they also released the encumbrance?

No! Canceling an invoice **does not** release an encumbrance. If you need to know how to release an encumbrance, then contact famis-aid@tamu.edu for instructions.

Can You Answer These Questions?

Below are questions sent in by actual FAMIS users. Can you help solve their problems? The names have been changed.

Question 1. In the past few weeks, Fred, an FMS auditor, has been sending me FYA PIPs for things that did not need further approval (e.g., insufficient funds). I rejected them to Fred to get them out of my in-box. Did I do the right thing? Thanks, Kim

Answer 1. Kim's action was correct. Fred was sending the wrong type of PIP. Kim needed to reject the PIP to Fred to get it out of her in-box.

Question 2. I am confused. I can delete FYI PIPs from my in-box. However, when I try to delete FYA PIPs, it says that the creator of the PIP is the only one that can delete the document. Please help. Thanks, Jen

Answer 2. FYI PIPs are For Your Information notifications. They do not require any changes requiring further approvals to the limited/exempt purchase document itself. For example, the signer needs to sign the document. If you receive an FYI PIP, you should read it, follow up on the proposed problem, and then delete it from your in-box.

FYA PIPs, on the other hand, are For Your Approval notifications. This means that there is a problem with the limited/exempt document that needs approval before FMS can fix the problem. Since FMS auditors are the creators of FYA PIPs, they are the only ones who can delete them. Since FYA PIPs require further approvals before FAMIS will pay a document, FAMIS requires the department to take action on the FYA PIP. Jen needs to either reject the PIP or approve the PIP so that it will eventually end up in the auditor's in-box who created the FYA PIP.

Question 3. Bev and Jack are creators for my department. Bev is out of the office. Jack needs to access Bev's in-box, but is unable to do so. What do we need to do?

Answer 3. Your FAMIS Office Manager needs to add Jack to the Creator Desk (Screen 924). Contact FAMIS Security at famis-aid@tamu.edu if you do not know the Office Manager.

Question 4. I can't delete this PIP from my in-box. It says only the original creator can do this. I thought I was the original creator. Thanks, Rita

Answer 4. Although you may have created the purchase document, you are not the creator of PIPs. FMS accounts payable auditors, for example, Mary Kay Charanza, Damon Wallace, etc., are creators of PIPs. Since you cannot delete the PIP, it tells me that the PIP is FYA. Follow the instructions in PIP Questions and Answers number 10: What should I do with FYA PIPs?