C-SMART

BILL PAYMENT REFUNDS

HOW TO ADD A BILL PAYMENT REFUND

1. Go to the vendor's **Bills** page.

    ➢ Click the bill's **Transaction ID** OR enter it into the **Search Name or Transaction ID** bar.

OR

2. Click **Add Payment Refund**.

3. Enter and save the refund details.

   ➢ C-SMART will alert you if you leave out required information. Complete the fields below:

      ◆ **Refund Date:** Enter the date the refund was received.

      ◆ **Exempt Amount:** Review Chapter 3 of the Handbook for more information on exempt expenditures or consult with your Candidate Services liaison.

      ◆ **Notes:** Enter any additional information. The CFB does not receive the information you enter in this field. Your notes will be saved across all related transactions.

   ➢ Then, click **Save**.

4. The refund has been successfully saved.

   ➢ At this point**,** C-SMART will return you to the vendor's **Bills** page. The **Totals** box and list of bills will be updated to reflect the newly saved transaction.

Best Practice: Write the C-SMART **Transaction ID** on the copy of any related documentation, such as a receipt or letter from the vendor.

HOW TO EDIT A BILL PAYMENT REFUND

1. Go to the refund's **Bill Payment Refund** page.

    ➢ Click the bill's **Transaction ID**, scroll down to **Bill Payment Refunds**, click the **gear** next to the payment and **Edit Payment Refund**. You can also use the **Search Name or Transaction ID** bar.

OR

2. Modify the necessary fields and then click **Save**.

3. The refund has been successfully edited.

Important: The timestamp at the bottom will be updated to show who last modified the transaction.

HOW TO DELETE A BILL PAYMENT REFUND

1. Go to the refund's **Bill Payment Refund** page.

   ➢ Click the bill's **Transaction ID**, scroll down to **Bill Payment Refunds**, and click the refund's **Transaction ID**. You can also use the **Search Name or Transaction ID** bar.

OR

2. Click **Delete** to proceed.

   ➢ Click **Yes** on the window that opens to complete the deletion.

3. The refund has been successfully deleted.

Important: You should generally only delete a transaction if it was entered in error.