



Create an Assignment Payment Request

This job aid explains how to create and submit an assignment payment request. Assignment Payment Requests are used to request reimbursement for costs associated to a contractor's assignment that are not covered by time or expense. Examples include the cost of a Background Check or Drug Screening.

⚠ You can submit an assignment payment request against effective assignments as long as the expenditure date falls within the start and end date of the work order. If you need to create an assignment payment request that is outside of the effective dates or for a closed work order, please contact your Shell Manager for assistance. An assignment payment request cannot be submitted for any completed work order after it has been closed for 90 days.

To create an assignment payment request:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
2. Hover over the **Work Orders/Assignments** tab in the Header Menu bar and click **Assignments**. The **Assignments** list screen displays.

Assignment ID	Job Title	Buyer Organization	Resource	Supplier Organization	Start Date	End Date	Assignment Status	Assignment Actions
12056892	Scheduler (4)	Westfield Chemical (USA)	McIntyre, Carolyn (605.79527)	Shell Chemical Services LLC	11/20/18	12/31/19	Effective	<input type="checkbox"/> view assignment history →
12031806	**Identified Candidate for Payroll	Westfield Chemical (USA)	McIntyre, Carolyn (605.79527)	Shell Chemical Services LLC	11/28/18	6/1/19	Effective	<input type="checkbox"/> view assignment history →

3. Scroll or search through the list to locate the assignment for which you want to request a payment.
4. Use the checkbox in the left-hand column to select the assignment then click the **modify** button (**Modify**) in the column header. The Modify Assignments Wizard screen displays.

Modify Assignments Wizard

Assignment Information

Actions: **Cancel** **Next**

What would you like to do with these assignments?

☒ Create Payment Requests

5. Click the checkbox to indicate you want to create a payment request.
6. Click the **next** button in the Actions section to continue. The Modify Assignments Wizard – Create Payment Requests screen displays.



7. Enter the information as requested using the guidelines provided below. Required fields are marked by a **red asterisk (*)**.

Modify Assignments Wizard - Create Payment Requests

Specify requested information, which will be considered in the creation of all of the individual payment requests for the selected assignments.

Actions: [Previous](#) [Cancel](#) [Next](#)

Payment Request Information

Action: ☐ Save payment requests ☒ Save and submit payment requests for approval

Buyer Organization
Requesting Payment From: **SPC (Shell Process and Chemicals)**

Supplier Organization
Requesting Payment For: **Beeline Automotive LLC**

Choose Payment Type:* **<-- select value -->**

Currency: EUR

Enter Requested Amount:* **0.00**

Reimbursement Amount: 0.00

Comments:

Expenditure Date:* _____

Enter the associated "expenditure date" for this transaction. When invoices are processed for the date range that includes this "expenditure date", the item will be processed for invoicing as long as it is entered and approved by the regular invoice cutoff period.

Value Added Tax

Want to understand the applicable VAT rate?

Effective Date: _____ Enter the effective date for the VAT rate. This could be an invoice date, expenditure date, etc.

[Retrieve VAT Rate](#)

Cost Allocation Codes

Invoice Code Amount 1	Amount:* 0.00
	Reimbursement Amount:
	CAC: <-- select value -->

Add Another Cost Allocation Code: [Add New](#)

Supplier Reference Number: _____

Supplier Reference Date: _____

Document Attachment File: [Choose File](#) No file chosen Visibility: Public [Attach](#)



Action: Use the radio buttons to indicate whether you want to “Save payment requests” (lets you create the payment request but save it to submit at a later time) or “Save and submit payment request for approval” (lets you create the payment request and submit it for approval now.)

Choose Payment Type: Use the selection list to indicate the type of reimbursement you are requesting (e.g., background check, drug screen, etc.)

Enter Requested Amount: Enter the **total** reimbursement amount.

Comments: Include any information needed by the Shell Manager to approve your request.

Expenditure Date: Enter the associated expenditure date for this transaction. When invoices are processed for the date range that includes this expenditure date, the item will be processed for invoicing as long as it is entered and approved by the regular invoice cutoff period.

Invoice Code Amount 1: The Cost Allocation Codes section lets you allocate your payment request cost to various Shell cost codes. If you do not have this information available, enter the full reimbursement amount and select the first option under CAC 1. The Shell Manager will make appropriate adjustments prior to approving.

Supplier Reference Number: Enter the supplier invoice number.

Supplier Reference Date: Enter the date of your request.

Document Attachment: Attach the supplier invoice.

- Click the **next** button in Actions section to continue when your entries are complete. The Modify Assignments Wizard – Confirmation screen displays.

Modify Assignments Wizard - Confirmation

Actions: [Previous](#) [Finish](#) [Cancel](#)

A summary of the actions and assignments you have selected is below. If you would like to continue and take these actions on these Assignments, click finish.

You selected the following actions:

Create Payment Requests

You selected the following assignments:

Assignment ID	Buyer Organization	Job Title (ID)	Supplier Organization	Resource Name (ID)	Start By	End Date
12063423	HR	Associate (8778372)	HR	HR	12/3/18	12/2/19

- Review and confirm the details displayed on the confirmation screen. (Click the **previous** button in the Actions section if you need to go back and make adjustments to your request.)
- Click the **finish** button in the Actions section to submit your payment request. A notification is sent to the Shell Manager Approver.