

General Accounting Customer Request System User Guide

OOTC - General Accounting has partnered with **VEOCI** for our new Customer Service Tool to provide a better mechanism for tracking and monitoring customer requests and communications.

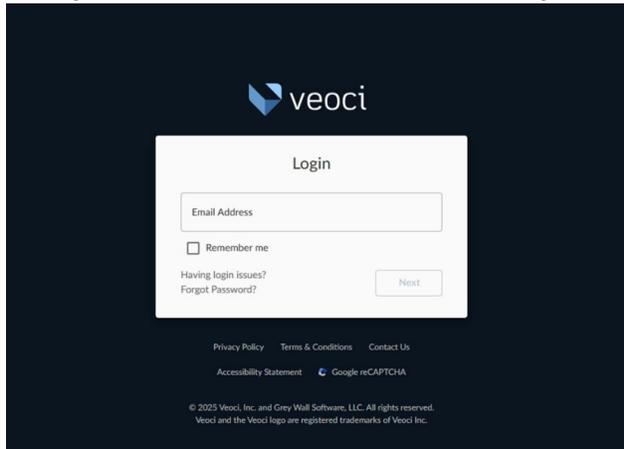
Follow the steps below to access the **General Accounting Customer Request Dashboard** to submit a new request form and to track the status of previously submitted request forms.

Link to the **General Accounting Dashboard** - <https://veoci.com/v/p/dashboard/es3dy85cha>

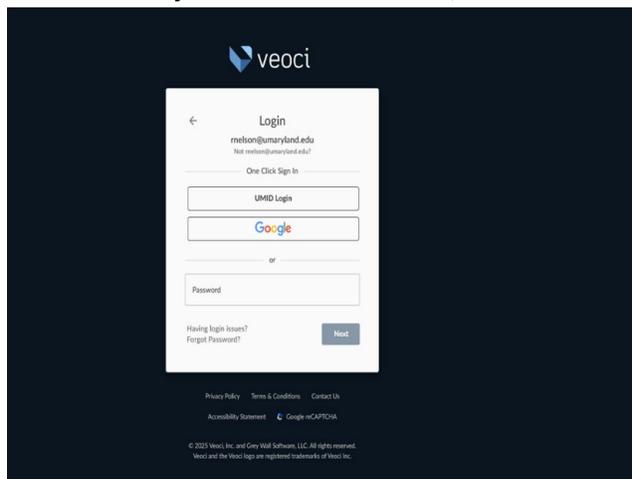
Accessing the General Accounting Customer Requests System

1. Click on this link - <https://veoci.com/v/p/dashboard/es3dy85cha>

Enter your UMB email address to alert the system of your UMB credentials.



2. This will take you to the next screen, select UMID to access the system through UMB's SSO.



General Accounting Customer Request System User Guide

3. Scroll down, to enter your UMB SSO credentials.

veoci

UMID: rnelson

Password: ●●●●●●●●

Login

[Forgot Password?](#) [First Time User, Setup Your Password](#) [OneCard Guest Deposit](#)

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What is the UMID?
The UMID is a common ID that enables you to access many campus applications with the same username and password.
[Learn more about the UMID.](#)

Multi-Factor Authentication
Your UMID and password require Multi-Factor Authentication (MFA) while both on campus and off campus.
[Learn more about MFA.](#)

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4. This will bring you to the **General Accounting Dashboard**. To access the request forms, select **“General Accounting: Form Requests”** - at the top in the **blue header area**

University Of Maryland, Baltimor...
General Accounting User Dashboard

New Edit Tools Support

Links

General Accounting: Form Requests

GA Form Requests Filter Entries

| Status | Date Initiated | Requester/Customer | Type of Request: |
|---------------------|----------------|--------------------|------------------|
| No Workflow Entries | | | |

Status of Requested Form

No Workflow Entries

Request Type by Month

No Workflow Entries

General Accounting Customer Request System User Guide

5. Submitting Customer Request Forms

The screenshot shows the 'General Accounting- Form Requests' interface. At the top, there is a header '1. Request' with an upward arrow. Below it, the 'Request Status' is set to 'New'. The 'Basic Information' section is expanded, showing a 'Requester' dropdown menu with 'Alexandra Zouras-Wieneke' selected. To the right, the 'Type of Request' section is labeled 'REQUIRED' and contains a list of radio button options: 'Cancel CBS Bill Submission Process', 'CBS New Customer Setup Request', 'CBS Memo Line Request', 'RSTARS Transfer Request Online', and 'VA Hospital Billing (Tungsten) Request Form'. A 'Submit' button is located at the bottom right of the form.

a. **Select a Request Form**, from the list in the above screen shot.
Choose the appropriate request form based on your needs.

b. Filling Out the Request Form

Complete the necessary information/fields for your request.

To better serve our customers, some new questions have been added to the forms. For example, in the **CBS New Customer Request form**, you will be asked to assign a collector, the collector is the person responsible for the customer bill.

For this, you can either select “me” as the collector or search for/select another user to act as the collector for this request.

The screenshot shows a close-up of the 'Assign Collector' field. The label 'Assign Collector' is followed by a 'REQUIRED' tag. Below it is a search input field with the placeholder text 'Type name or email'. To the right of the input field are two buttons: a dark blue button with a white user icon and a dark blue button labeled 'Me'. Below the input field, the label 'Collector Org #' is followed by a 'REQUIRED' tag.

c. Attach Backup Documentation

Before submitting the form, ensure you have attached any necessary backup documentation to support your request.

General Accounting Customer Request System User Guide

d. Review and Submit

After filling out the form and ensuring all information is accurate and complete, click submit to send your request for processing.

6. User Dashboard

Once your request has been submitted, you will be redirected to your User Dashboard. The dashboard will display a list of all requests you have made along with their status.

The screenshot displays the user dashboard for the General Accounting Customer Request System. The dashboard is titled 'General Accounting: General Customer Service' and features a navigation bar with 'Home', 'Edit', 'Tools', and 'Support' options. The main content area is divided into three sections:

- Created Request:** A table with columns for Status, Date Initiated, Requester, and Type of Request. It shows one request in progress: 'New UMB Customer Request' initiated on 2025-Mar-24 11:25:11 by 'Roshain Nelson'.
- Status of Requested Form:** A summary table showing 'In Progress' (1) and 'Total' (1).
- Request Type by Month:** A summary table showing 'Mar 2025' (1) and 'Total' (1).

Below the 'Created Request' table is a 'Survey Pending' section with columns for ID, Initiated by, Current Steps, Status, Request Status, and Requester. It currently shows 'No Workflow Entries'.

7. Additional Notes

- Make sure to check the status of your request from the dashboard.
- If you need to make any changes to your request after submission, reach out to generalaccounting@umaryland.edu for assistance.
- Once we have fulfilled your request and close the ticket, you will receive a short survey rating us on our customer service and timeliness.