Employees needing to Request a Refund through uPay must first be granted access to the Microsoft Teams uPay Refund Request team. To do so, have the Business Officer send an email to Andrea Hendricks (Andrea_Hendricks@baylor.edu) with their approval to add the named employee to the team.

Once access to the Microsoft Team is granted, open the uPay Refund Request spreadsheet from the Files tab. See below for clarification on which tab to enter your request.

*If a refund is required, in addition to cancelling a recurring payment, add to BOTH worksheets!

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**Stop Recurring Payments**

*Only used by Gifts, Advancement & KWBU to cancel a recurring payment*

Complete only these fields on the worksheet:
- Date of Request
- Name of requester
- Department Name
- uPay Transaction ID
- Customer Name

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**uPay Refund**

*Use to request a uPay Refund*

Complete only these fields on the worksheet:
- Date of Request
- Name of requester
- Department Name
- Application Name
- uPay Transaction ID
- *Payment Gateway Reference Number (if uPay Transaction ID is not available)*
- Customer First Name
- Customer Last Name

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Do NOT delete any other items! Once request information has been added, click Close and the worksheet will Save and Close.

The worksheets are checked frequently for new requests and are processed in a timely fashion by a member of Central Finance. The Customer will receive an automated email when their refund has been processed. The Date of Refund will be added to the worksheet(s) by the person processing the refund.

*Department users will NOT be notified. It is the responsibility of the requester to review the worksheet for refund status.*