Voucher Approvals

Key Changes:

- Pooled approvals will allow primary and alternate approvers to access the transaction at the same time.
- When taking action on a voucher, approvers will choose between Approve, Send Back, or Hold.

Accessing Vouchers

Approvers may access voucher transactions for approval in several ways: through the Worklist (for primary approvers), by navigating to Accounts Payable > Vouchers > Approve > Approve Voucher, or alternately, through the Approval WorkCenter.

The Approval WorkCenter is accessible from a link at the bottom of the main menu.

Routing for Approval

Vouchers are simultaneously routed to the primary approver and to a pool of one or more alternate approvers. A voucher needing approval will remain in the primary approver’s queue until it has been approved. In the case that a voucher has not been approved or sent back within five days, the preparer will be notified by a system-generated email. Voucher preparers will follow up with the approver when a voucher has not been approved within the five days.

Taking Action on Vouchers Needing Approval

Criteria for approving a voucher remain the same.

Follow these steps to confirm the information in a voucher:

1. Open the voucher in one of the ways described above (Worklist, WorkCenter, Accounts Payable module).
2. Review the invoice.
3. Review the following fields: Comments, ChartFields, Remit address.
4. Confirm that the transaction is allowable per policy.
5. Approvers may take one of three actions on vouchers:
   - **Approve**: When the transaction meets policy and procedure, click <Approve>.
   - **Send back**: Enter information into the Approval Comments field to instruct the preparer on what must be changed or to cancel the voucher. Click <Send back>.
   - **Hold**: Prevents any other individuals—including other approvers—from taking action on the transaction, effectively stops the processing of the transaction. Transaction will only proceed through the approval process when it is taken “off Hold.”

If you are designated as both the DeptID and Certified Approver for the same line, you will only need to take action once and it will be recorded for both the DeptID and CA approvals at once.
Reviewing a Voucher for Approval

1. Review the Invoice.
2. Verify Remit Address.
3. Review Justification.
4. Verify ChartField string.
5. Add Approver Comments to instruct preparer about what must be changed if using the Send Back button.