This document guides you as to how to approve an invoice in your role as an approver.

After login the following screen is displayed. All invoices awaiting your approval will be displayed.
Select the item you wish to review by “clicking” on it. Your ‘Invoice Details’ screen will be displayed.
Select the ‘View Invoice’ icon. The uploaded invoice image will be displayed.
In this instance the invoice window was maximized. Compare the invoice to the ‘Invoice Details’ screen.
Audit the screen for accuracy:

Do all elements “match”? Supplier name, payment address, invoice number, invoice date, invoice amount, charged to the correct organization, expense type or award?

Is a PO required? Is the correct PO number referenced?

If an award is involved is the expenditure item date correct?

If a non-domestic expense type is involved are the ‘Type of Activity’ and ‘Regions’ fields properly populated?

Make note of how the payment will be made by reviewing the ‘Payment Method’ field.

If you need to enter a comment for review by AP, you may enter it in the 'Comments (Message to AP)' window.
You will now exercise your approval decision option.

- **Send Back** – Send back to the request originator for corrective action or additional supporting documentation
- **Approve & Forward** – Affix your approval and forward to other requisite approvers
- **Approve** – Affix your final approval
Should you select the ‘Send Back’ option:

You will need to provide the reason the invoice is being sent back in the ‘Comments’ window and then click ‘OK’. The invoice is then returned to the originator.
Should you select the 'Approve & Forward' option:

Perform a search for the individual to whom you wish to forward the invoice by entering the employee’s name last name, comma and then first name until identified. Then click on the name to select it.
Enter any comment you deem appropriate in the ‘Comment’ window and then “click” ‘Approve & Forward. The invoice will then be forwarded to that person for their review and approval.
Should you select the ‘Approve’ option:

When you indicate ‘Approve’ for your final approval the invoice is cleared from your queue and forwarded to AP for review.