To view any items awaiting approval in PeopleSoft Financials, click on the Approvals tile on the Home Screen.

On the left side menu, the different modules will be displayed.

By default, the approval screen will default to Approval Framework - Vouchers. To approve a specific voucher, type in the Voucher ID and click Search.

Hint: The screen can be widened by clicking the navigation guide.
Review the details of the voucher including the **supplier’s name, amount** and **invoice** attached in the hyperlink.
Scroll down to review the supplier's address, the chartfield spread, including the GL Code, and any comments that may have been entered.
6 If all appears accurate, click **Approve**. Vouchers can also be denied. A **comment** for the enterer should be added first before clicking **Deny** to deny the voucher.

7 To move to the next voucher available for approval, click the **Worklist** hyperlink.

8 For Cost Transfers, click on **Cost Transfer Entry** from the left side menu, type the **Cost Transfer Number** in the **Journal ID** field and click **Search**.
Approvers will want to make sure that **Justification** is correct. If it is not correct or if there is not enough information provided, the cost transfer may be denied. Approvers will want to make sure that the **chartfield information** is correct. Be sure to double check the **debits and credits** of the cost transfer. Approvers will also want to review any **attachments** and make sure that the required attachments are available for review.

Approvers can deny by clicking the **Deny** button and putting in **denial comments**. An email will be sent to the entry person. Entry users can update the cost transfer and then resubmit for approval. If the information is correct, click the **Approve** button. An email is then sent to the Financial Services department letting them know there is a cost transfer waiting their review.
To approve an OnDemand, click OnDemand Check Entry from the left menu, type in the Check Transaction ID and click Search.

Review the details on the OnDemand, including the documents attached in the second tab, and click Approve or Deny. Denials will require comments to the enterer.

To approve Pcard charges, click P-Card Transactions on the left side menu.

For approvers (not cardholders/reconcilers), the default search view will show transactions that have been reconciled but not approved or processed. Click Search to see the transactions available for approval.
For transactions that have been reconciled, the approver should review the **vendor**, **amount** charged and the **chartfield spread**, including the GL code(s). Note that the approver can update the chartfield spread or add additional attachments, if necessary.

Approvers should also review any details in the **Transaction Details** tab as well as view the attachment on the **Attachments** tab.

When the review is complete, check the **Approved** box and then **Next in List** to move to the next transaction.
If a cardholder/reconciler is out of the office, the approver will have the ability to update the chartfield spread and add an attachment. Change the default search field to **Reconciled = No** and then click **Search**.

Please ensure that all transactions are reconciled by the monthly cutoff deadline. Any chartfield spread updates that need to be made after that date must be done via a cost transfer. Note that documentation for Pcard transactions can be added after the cutoff date.

To review **Requisitions**, select **Manage Requisition Approvals** on the left side menu. Click **Search** to see all available requisitions and then click on the **Requisition ID number**.
21. Click on the view printable version hyperlink.

22. This will display the details of the requisition, including the chartfield spread.
### Requisition Details

**Business Unit:** OUHSC  
**Requester:** 520767  
**Status:** Pending Approval  
**Currency:** USD  
**Requisition Total:** 20,000.00

**Line 1 Details**
- **Item Description:** Architectural Services - Interior Design  
- **Quantity:** 1.0000  
- **UOM:** LOT  
- **Price:** 10,000.0000  
- **Total:** 10,000.00  
- **Line Status:** Pending

#### Line 1 Table

<table>
<thead>
<tr>
<th>Dist</th>
<th>Status</th>
<th>Location</th>
<th>Qty</th>
<th>PCT</th>
<th>Amount</th>
<th>GL Unit</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Open</td>
<td>SOCC05000</td>
<td>1.0000</td>
<td>100.00</td>
<td>10,000.00</td>
<td>OUHSC</td>
<td>821530</td>
</tr>
</tbody>
</table>

#### Open QTY

<table>
<thead>
<tr>
<th>GL Base Amount</th>
<th>Currency</th>
<th>Sequence</th>
<th>Capitalize</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,000.00</td>
<td>USD</td>
<td>0</td>
<td>N</td>
</tr>
</tbody>
</table>

### Requisition Details

**Ship Line:** 1  
**Attention:** CLINIC  
**Ship Via:** UPS

**Line 2 Details**
- **Item Description:** Architectural Services - Graphic Design  
- **Quantity:** 1.0000  
- **UOM:** LOT  
- **Price:** 10,000.0000  
- **Total:** 10,000.00  
- **Line Status:** Pending

#### Line 2 Table

<table>
<thead>
<tr>
<th>Dist</th>
<th>Status</th>
<th>Location</th>
<th>Qty</th>
<th>PCT</th>
<th>Amount</th>
<th>GL Unit</th>
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</tr>
</thead>
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<td>10,000.00</td>
<td>USD</td>
<td>0</td>
<td>N</td>
</tr>
</tbody>
</table>
Approvals

23 Close the details and scroll to the bottom of the requisition to Approve or Deny. Denials will require comments to the enterer.

For SUR's, click on SUR Entry on the left side menu, click Search and then click on the SUR. SUR's are specific to HSC.

25 Approvers will want to make sure that the information in the Request Description box has enough information for the Service Unit to work the SUR. Approvers should also review any attachments on the Attachments tab and verify that the chartfield information is correct.
If the SUR is not correct, the approver can deny the SUR and send it back to the enterer for correction. Approvers can deny by clicking the Deny button and putting in Denial comments. An email will be sent to the entry person. Entry users may update the SUR and resubmit for approval.

To approve the SUR, click the Approve button. An email is then sent to the Service Unit letting them know there is a SUR waiting for them. The approver can also add Approver Comments giving the Service Unit extra instructions for information.

To access all items needing your approval, use the Worklist. From the left side menu, click Worklist.
### Approvals

<table>
<thead>
<tr>
<th>Page</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>29</td>
<td>All items needing approval will be displayed on this screen. To access any item, click on the hyperlink and review the necessary details to approve or deny.</td>
</tr>
<tr>
<td>30</td>
<td>To have the ability to approve Cost Transfers, OnDemands, Pcards, Requisitions, Service Unit Requests (SUR’s) and/or Vouchers, users must take the Introduction to PeopleSoft and Approver training. Users must have their supervisor or an authorizing agent fill out the PeopleSoft End User Security Access Form in order to get access to the system. <strong>Users cannot complete their own forms.</strong></td>
</tr>
</tbody>
</table>

![Image of PeopleSoft forms]

| 31   | The security form can be found on the Financial Services website. On the security forms, users will list which **Orgs** that need access to approve along with which approver roles they need. Remember that you cannot be an enterer and an approver at the same time for the same module. |

![Image of security form]

| 32   | For most modules, email notifications will be sent when there is an item awaiting approval. However, as many modules would generate an inordinate amount of emails, some are reduced to a daily summary and some require that you manually check your Worklist for items to approve. |

<table>
<thead>
<tr>
<th></th>
<th>Cost Transfers = One email per Cost Transfer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>OnDemands = One summary email per day</td>
</tr>
<tr>
<td></td>
<td>Requisitions = One summary email per day</td>
</tr>
<tr>
<td></td>
<td>SUR’s = No emails, check Worklist</td>
</tr>
<tr>
<td></td>
<td>Vouchers = One summary email per day</td>
</tr>
</tbody>
</table>