

HuskyBuy Training Manual

New Invoice Approvals Experience

Invoices must be approved by a HuskyBuy user with Signature Authority (SA) on the included FOAPAL. (Reminder - If a paper/email invoice is received by the department, it still will need to be forwarded to A/P at accountspayable@uchc.edu)

If the PO Owner <u>does not</u> have SA, they can approve the Invoice but also must assign an Ad-Hoc approver. SEE SECTION 1A

If the PO Owner *does* have SA SEE SECTION 1B

ALL USERS can navigate to the Approvals screen either via the Action Items located at the top right of HuskyBuy and clicking Invoices:

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Or they can navigate to the screen by clicking the Accounts Payable icon on the Navigation Bar on the left \rightarrow choose Approvals \rightarrow Invoices to Approve

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SECTION 1A - PO OWNER WITHOUT SA

In the Approvals screen click the down arrow to expand, if necessary, and click an Invoice # to open

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Scroll down to "Ad Hoc Approver" and click on it. In the popped window search and choose the Ad-Hoc Approver with SA \rightarrow add a Comment if needed \rightarrow click Save.

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The Ad Hoc Approver has been added to the workflow and a new Workflow Step has been added. (Please note you can change the Ad-Hoc Approver if needed prior to approving the invoice.) Click Approve/Complete in the upper right and the Invoice will move into the Ad-Hoc workflow step.

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SECTION 1B – INVOICE APPROVERS WITH SA

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The Invoice copy will be attached to the HB Invoice - review as needed. Click the appropriate response in the upper right and the Invoice will move into to the next Workflow Step.

Note: Each approver can Ad-Hoc the invoice to another approver if multiple approvals are necessary to pay the invoice. For example, additional PI Approval. The same steps above should be followed with the last approver just clicking Approve/Complete with no additional Ad-Hoc Approver selected.

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Once the invoice is fully approved by the department, it returns to Accounts Payable where appropriate SA approvals will be verified. If the invoice did not get <u>at least</u> one required SA approval initially, it will be returned to the department by Accounts Payable for additional approval.

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If you are unsure who has SA for your FOAPAL, reference the UCHC APEX application linked to below (user must be logged onto UCH's network to access):

UCHC APEX Signature Authority Application



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