



A Voucher Approval is for any “service related” PO. The voucher approval will automatically route to the requestor who entered the requisition. The voucher approval step is to verify services were “received” and gives the approval for Accounts Payable to pay the invoice.

If the requestor feels they are not the correct person to approve the voucher, they have the ability to “forward” the voucher to anyone who has access to P2P.

### Voucher Approval

Once a voucher on a PO has been created (by Payment Services) P2P will prompt a Voucher Approval if services need to be verified.

1. From the P2P homepage, navigate to **My Approvals**.  
Ensure you are checking this folder routinely, even if you are not a DOA as Voucher Approvals will go to the requestor who originated the requisition.

NUMBER	SUPPLIER NAME	FOLDER NAME	DAYS IN FOLDER ↑
C0001180	Biddle & Associates	My Voucher Approvals	140

2. Click on the voucher number. Review the voucher information to confirm it is correct.



Voucher • Biddle & Associates • C0001180

Approve/Complete Step

Summary	Matching	Supplier Messages	Comments	Attachments	History																										
<p>Supplier Name <b>Biddle &amp; Associates</b></p> <p>Supplier No. 1003873785</p> <p>Supplier Invoice No. INV243931A</p> <p>Invoice Date 3/4/2024</p> <p>Invoiced Received (mm/dd/yyyy) no value</p> <p>Accounting Date 3/4/2024</p> <p>Payment Terms Net 30 ( 0% 0, Net 30 )</p> <p>Due Date 4/3/2024</p> <p>Discount Date no value</p> <p><b>PO Information</b></p> <p>Buyer no value</p> <p>F.O.B. FOB Destination</p> <p>Multi-Year PO <input checked="" type="checkbox"/></p> <p>PO Type no value</p> <p><b>Match Details</b></p> <p>Match Status <b>Matched</b></p> <p>Contains substituted item(s) <input checked="" type="checkbox"/></p> <p>Amount-Only / <input checked="" type="checkbox"/></p>	<p>Jeff Holden 193 Blue Ravine Road Suite 270 Folsom, California 95630</p> <p>United States Email Nobody@jaggaer.com Phone 1-916-2941234- Address Id 1</p> <p><b>Discount, Tax, Shipping &amp; Handling</b></p> <p>Tax Engine calculation pending</p> <p><b>Discount, Tax, Shipping &amp; Handling</b></p> <table border="1"> <thead> <tr> <th></th> <th>Header-level</th> </tr> </thead> <tbody> <tr> <td>Terms Discount</td> <td>0.00 USD</td> </tr> <tr> <td>Discount</td> <td>0.00 USD</td> </tr> <tr> <td>Use Tax</td> <td>0.00 USD</td> </tr> <tr> <td>Shipping</td> <td>0.00 USD</td> </tr> <tr> <td>Handling</td> <td>0.00 USD</td> </tr> <tr> <td><b>Total</b></td> <td><b>12,000.00 USD</b></td> </tr> </tbody> </table>		Header-level	Terms Discount	0.00 USD	Discount	0.00 USD	Use Tax	0.00 USD	Shipping	0.00 USD	Handling	0.00 USD	<b>Total</b>	<b>12,000.00 USD</b>	<p>Voucher by Business Unit CSUB P2P (BKXMP)</p> <p>Voucher Number C0001180</p> <p>Voucher Type Voucher</p> <p>Voucher Owner Rocky Requester</p> <p>Voucher Source Manual</p> <p>Invoiced By Chris Dott</p> <p>Create Date 3/4/2024</p> <p>PO Business Unit CSUB P2P (BKXMP)</p> <p>Invoice Reviewed By no value</p> <p><b>Payment Information</b></p> <p>Pay Status In Process</p> <p>Payment Method Unknown</p> <p>Payment Record No. no value</p> <p>Payment Record Date no value</p> <p>Payment ID Ref no value</p> <p>Total Payment Amount no value</p> <p>Payment Partially Paid <input checked="" type="checkbox"/></p>	<p><b>Summary</b></p> <p><b>Pending</b></p> <p><b>Biddle &amp; Associates</b></p> <p>Supplier Invoice No. INV243931A</p> <p><b>Total (12,000.00 USD)</b></p> <table border="1"> <tbody> <tr> <td>Subtotal</td> <td>12,000.00</td> </tr> <tr> <td>Discount</td> <td>0.00</td> </tr> <tr> <td>Sales Tax</td> <td>0.00</td> </tr> <tr> <td>Use Tax</td> <td>0.00</td> </tr> <tr> <td>Shipping</td> <td>0.00</td> </tr> <tr> <td>Handling</td> <td>0.00</td> </tr> <tr> <td><b>Total</b></td> <td><b>12,000.00</b></td> </tr> </tbody> </table> <p><b>Related Documents</b></p> <p>Purchase Order: 2400001676</p> <p>Requisition: 3973396</p> <p><b>What's next?</b></p> <p>Workflow</p> <ul style="list-style-type: none"> <li>Submitted - Submitted - 3/4/2024 3:02 PM - Chris Dott</li> <li>Verify Received - Pending - Rocky Requester</li> <li>AP Review - Future</li> </ul>	Subtotal	12,000.00	Discount	0.00	Sales Tax	0.00	Use Tax	0.00	Shipping	0.00	Handling	0.00	<b>Total</b>	<b>12,000.00</b>
	Header-level																														
Terms Discount	0.00 USD																														
Discount	0.00 USD																														
Use Tax	0.00 USD																														
Shipping	0.00 USD																														
Handling	0.00 USD																														
<b>Total</b>	<b>12,000.00 USD</b>																														
Subtotal	12,000.00																														
Discount	0.00																														
Sales Tax	0.00																														
Use Tax	0.00																														
Shipping	0.00																														
Handling	0.00																														
<b>Total</b>	<b>12,000.00</b>																														

3. If the amount is correct, click the ▼ and select Approve.



Approve/Complete Step

3 Approve

Return Voucher

Place Voucher on Hold

Forward...

Summary

Pending

**Biddle & Associates**

Supplier Invoice No. INV243931A

**Total (12,000.00 USD)**

Subtotal	12,000.00
Discount	0.00
Sales Tax	0.00
Use Tax	0.00
Shipping	0.00
Handling	0.00
	<b>12,000.00</b>

**Related Documents**

Purchase Order: 2400001676

Requisition: 3973396

**What's next?**

Workflow

Submitted

Submitted - 3/4/2024 3:02 PM - Chris Dott

Header-level

0.00 USD	
0.00 USD	
0.00 USD	
0.00 USD	
0.00 USD	

**Payment Information**

Pay Status	In Process
Payment Method	Unknown
Payment Record No.	no value
Payment Record Date	no value

Voucher by Business Unit CSUB P2P (BXXMP)

Voucher Number C0001180

Voucher Type Voucher

Voucher Owner Rocky Requester

Voucher Source Manual

Invoiced By Chris Dott

Create Date 3/4/2024

PO Business Unit CSUB P2P (BXXMP)

Invoice Reviewed By no value

### Voucher Approval – Forward

4. If you feel you are not the correct person to approve the voucher, click the ▼ and select **Forward**.



Approve/Complete Step

- Approve
- Return Voucher
- Place Voucher on Hold
- Forward...

Summary

**Biddle & Associates**

Supplier Invoice No. INV243931A

**Total (12,000.00 USD)**

Subtotal	12,000.00
Discount	0.00
Sales Tax	0.00

5. Type the criteria of the user you want to forward to and click **Search**.
6. Click the + to add you recipient.

User Search

New Search

Name ↑	User Name	Email	Phone	Action
Butterfield, June	15006090207	jrbutter@calpoly.com		6 +

Close



7. Add your reason for forwarding the voucher in the text box. Then click the **Forward** button.

**Add Note** ✕

Forward To - Butterfield, June

Forward Reason

June - please verify services received as this was for your department.  
Thank you,  
Bianca

expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Forward
Cancel

Once the voucher is forwarded, the user you forwarded to will receive an email notification and the voucher will show if in their My Approvals queue.

### Voucher Approval – Return Voucher

8. While verifying, if the voucher amount is incorrect, please select **Return Voucher**. Enter in the text box reason the voucher is incorrect. Proceed with Change Request or PO Revision to correct the PO to match the final invoice.

