PeopleSoft Payables

LSUNO Voucher Approvals

Approver Guide

August 2025

VERSION CONTROL

Version	Date	Task	Owner	Description
0.1	02/09/2017	Created	Danielle Burlison Barbara Doss	Created Document for Voucher Approval Framework (VAF) Workflow for LSUNO Approvers
0.2	03/15/2017	Updates	Barbara Doss	Draft Edits
0.3	03/20/2017	Updates	Barbara Doss	Draft Edits
0.4	03/23/2017	Review	Danielle Burlison Michele Gonzales Barbara Doss	Document Review
0.5	03/23/2017	Update	Barbara Doss	After-review format clean-up. Add: Worklist note for dual approvers (requisitions and vouchers)
0.6	03/26/2017	Update	Barbara Doss	Update header from "Business Manager" to "Approver Guide"
0.7	03/31/2017	Update	Danielle Burlison Barbara Doss	Page #4 – Approver section- **Only APPROVED vouchers will be selected for payment.** Page#10- add to #2&3- prevents voucher from completing workflow process**; the invoice will not be paid.**
1.0	03/31/2017	Review / Approve	Danielle Burlison	Document Approved
1.1	8/14/17	Update	Barbara Doss Michele Gonzales	Additional Approval Path #6 for Information Technology
2.0	05/08/2024	Update	Barbara Doss	Update – Tools 8.59; Image 27. Add Approval via Worklist section
3.0	08/22/2025	Update	Barbara Doss	PUM51 Upgrade

Contents

Overview

Voucher Approval Workflow

The electronic movement of vouchers and approval of invoices through PeopleSoft.

Benefits

- ✓ AP invoices and other related documentation imaged and stored with the voucher.
- ✓ Approvals also caputured electronically and date stamped.
- ✓ Maximize all tools available in PeopleSoft.
- ✓ Move to a paperless environment.

How Workflow Works

Similar to our existing email set-up, employees with invoice approval authority have been reviewed and approved by the department Business Manager and/or Department Head. Access to be able to approve/deny a voucher in PeopleSoft will be requested through information security (upon official go-live in PS, the AP "INV" email distribution lists will not be maintained).
Requests for signature authority memos will still be requested.

- ✓ **The routing rules are governed by the department id on the chartstring and/or account code.**
- ✓ **Only APPROVED vouchers will be selected for payment.**

Standard Approval Workflow

- ✓ A LSUNO PO voucher that is **<u>not</u>** a utility payment, sponsored project, professional service or capital improvement.
- ✓ Vouchers are routed to approvers assigned to department id on the chart-string.
- ✓ If there are two chart-strings with different department ids, all approvers will be notified via email; only one approval is required in PeopleSoft. .
- ✓ If you send an invoice of this type via email or fax stating or signed "approved", the voucher will route through workflow and require your electronic approval.

  To minimize this, **<u>please have your suppliers send all PO related / AP invoices to 433 Bolivar Street or emailed to noacctacctpay@lsuhsc.edu</u>**.

Utility Invoices Auto approved

- ✓ Will be self-approved; these vouchers will not go into the electronic workflow approval process.

Professional Services Invoices

- ✓ Continue to route with ink signatures.
- ✓ Invoices and associated supporting documentation routed via campus mail or emailed to <u>noacctacctpay@lsuhsc.edu</u> with signatures; documentation will be reviewed by AP for all required approval signatures and attached. If all required signatures are confirmed, PeopleSoft Vouchers of this type will not require additional electronic approval.

Sponsored Projects Invoices

- ✓ Continue to route with ink signatures.
- ✓ Invoices and associated supporting documentation routed via campus mail or emailed to noacctacctpay@lsuhsc.edu with signatures; documentation will be reviewed by AP for all required approval signatures and attached in PeopleSoft. If all required signatures are confirmed, vouchers of this type will not require additional electronic approval.

Capital Improvements Invoices

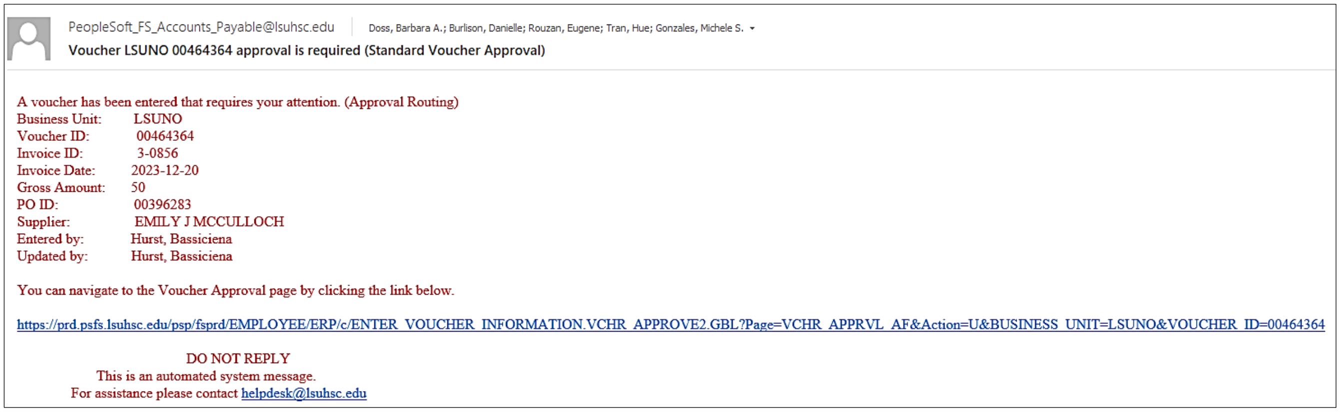
- ✓ Routed to Facility Services for review and approval.
- ✓ This path uses a single or small group of approvers and will not require Department level (fiduciary) approval.

Information Technology Invoices

- ✓ Two-step approval process for purchase order vouchers with the SHIP_TO of either 1324000 or LSU_DPC.
- ✓ Routed to the department for review and approval based on the purchase order line chart-string.
- ✓ Additional approval routing to a small group of Information Technology approvers for a second approval on the voucher.

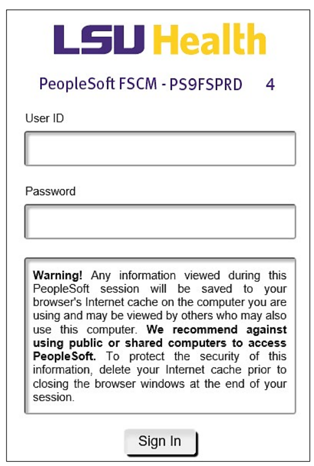
Approval via Email Notification

Once Accounts Payable creates a voucher, you will receive an email from ***LSUHSC Accounts Payable-Invoice Approval***: PeopleSoft_FS_Accounts_Payable@lsuhsc.edu like the one shown below, requesting approval.



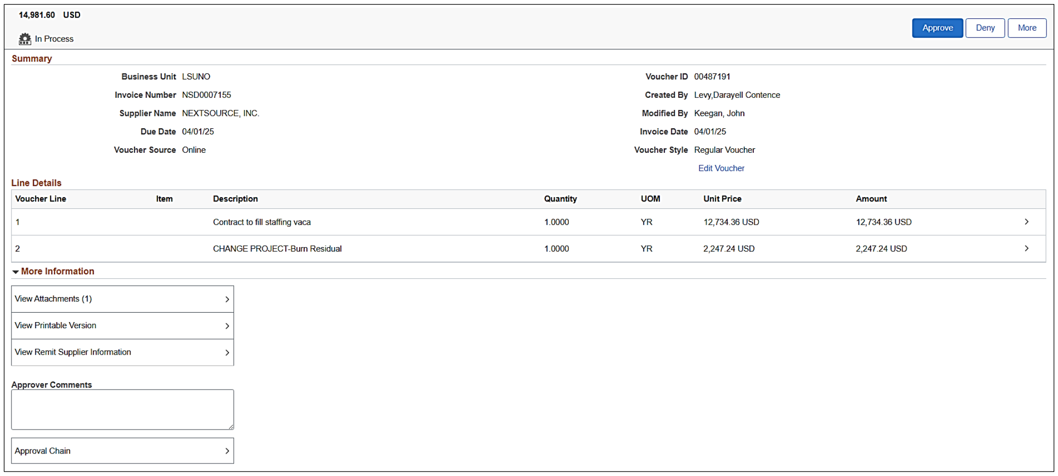
Once you receive the email click on the link to view the voucher information.

If you are not already logged on to PeopleSoft Financials, you will be prompted to do so.



Enter your ***User ID*** and ***Password.***
Click **Sign In**

If the voucher has not been approved, the below page appears.
Note: The voucher has an "***In Process***" status and the "***Approve***", "***Deny***" and "***More***" buttons are available.


14,981.60 USD
In Process
Approve Deny More

Summary

Business Unit LSUNO
Invoice Number NSD0007155
Supplier Name NEXTSOURCE, INC.
Due Date 04/01/25
Voucher Source Online
Voucher ID 00487191
Created By Levy,Darayell Contence
Modified By Keegan, John
Invoice Date 04/01/25
Voucher Style Regular Voucher
Edit Voucher

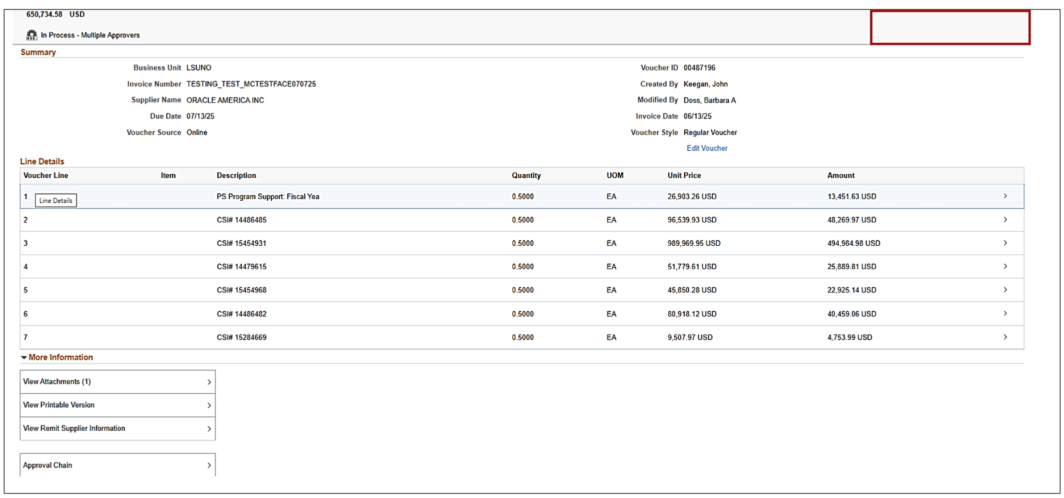
Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1		Contract to fill staffing vaca	1.0000	YR	12,734.36 USD	12,734.36 USD
2		CHANGE PROJECT-Burn Residual	1.0000	YR	2,247.24 USD	2,247.24 USD

More Information
View Attachments (1)
View Printable Version
View Remit Supplier Information
Approver Comments
Approval Chain

If there are multiple approvers assigned to the department, the voucher may already be approved. If this is the case the voucher will show a Status of Completed and Approved. You can review the voucher details using Voucher Inquiry.

If you are not a valid approver, you will see the aproval page, but the ***Appprove, Deny*** and ***More*** buttons will not be available.


650,734.58 USD
In Process - Multiple Approvers

Summary

Business Unit LSUNO
Invoice Number TESTING_TEST_MCTESTFACE070725
Supplier Name ORACLE AMERICA INC
Due Date 07/13/25
Voucher Source Online
Voucher ID 00487196
Created By Keegan, John
Modified By Doss, Barbara A
Invoice Date 06/13/25
Voucher Style Regular Voucher
Edit Voucher

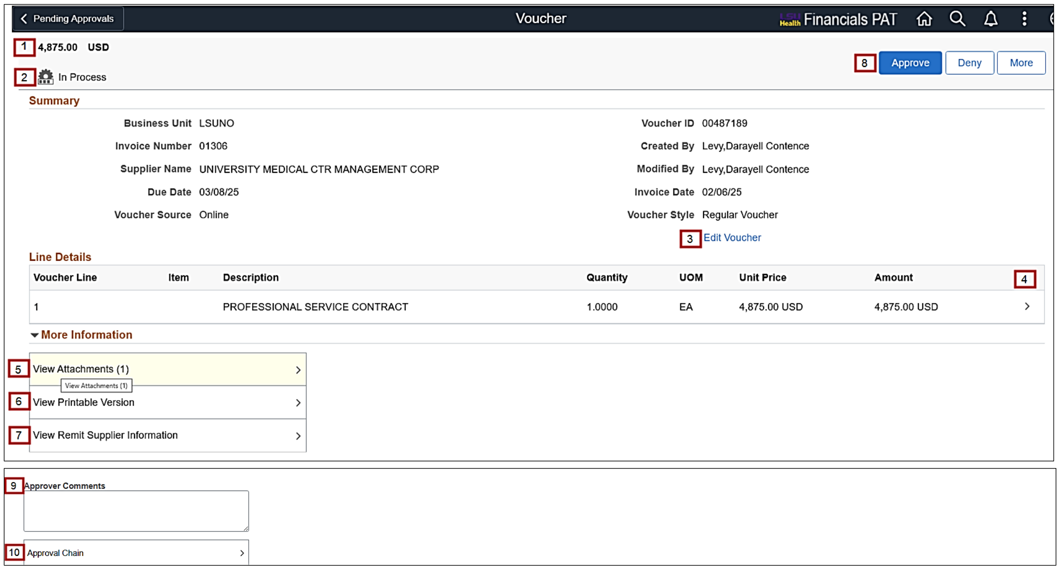
Line Details

Voucher Line	Item	Description	Quantity	UOM	Unit Price	Amount
1 Line Details		PS Program Support: Fiscal Yea	0.5000	EA	26,903.26 USD	13,451.63 USD
2		CSI# 14486485	0.5000	EA	96,539.93 USD	48,269.97 USD
3		CSI# 15454931	0.5000	EA	989,969.95 USD	494,984.98 USD
4		CSI# 14479615	0.5000	EA	51,779.61 USD	25,889.81 USD
5		CSI# 15454968	0.5000	EA	45,850.28 USD	22,925.14 USD
6		CSI# 14486482	0.5000	EA	80,918.12 USD	40,459.06 USD
7		CSI# 15284669	0.5000	EA	9,507.97 USD	4,753.99 USD

More Information
View Attachments (1)
View Printable Version
View Remit Supplier Information
Approval Chain

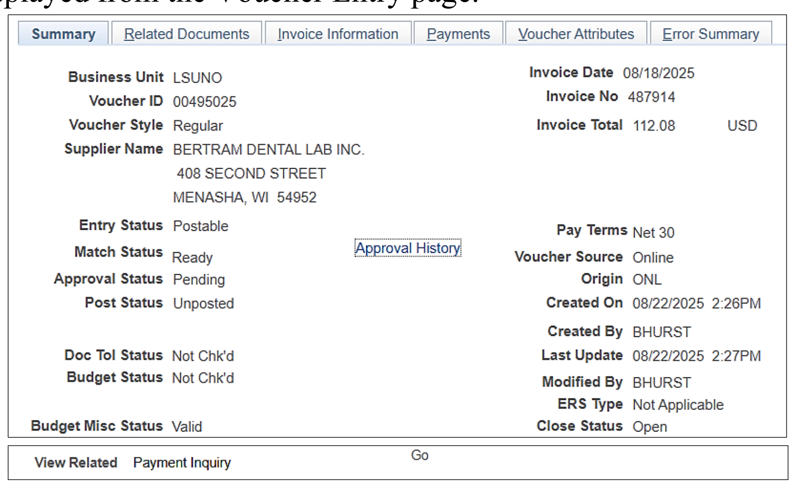
If you are not the correct approver, notify LSUNO ADMIN to reassign to the correct approver by sending a request to NOACCTACCTPAY@LSUHSC.EDU.

Voucher Review

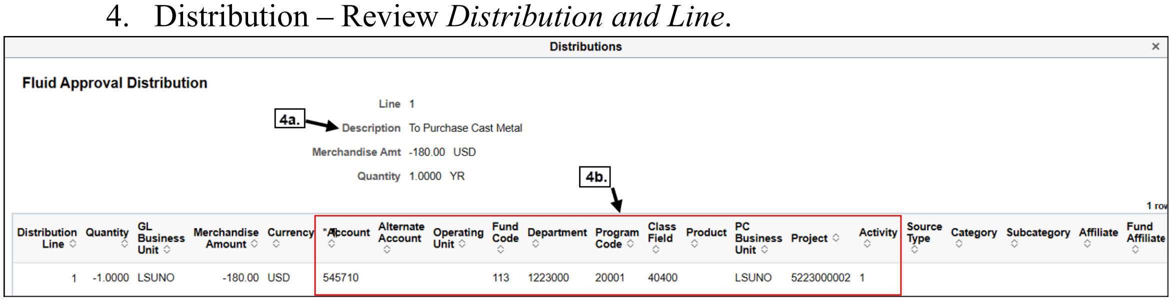


On the Approval page, review the following:

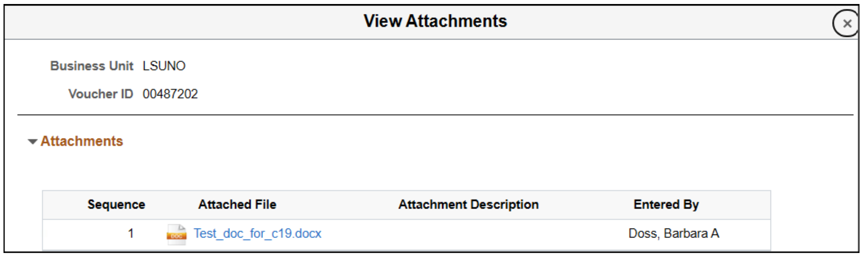
1. Invoice Amount
2. Invoice Approval Status (Optional)
3. Edit Voucher – Although the terminology reads "**Edit**", no edits can be performed. You can "**View**" the voucher and related information as it is displayed from the Voucher Entry page.



4. Distribution – Review *Distribution and Line.*



5. View Attachments <u>*NOTE: ALL PO Vouchers are required to have attachments.*</u>



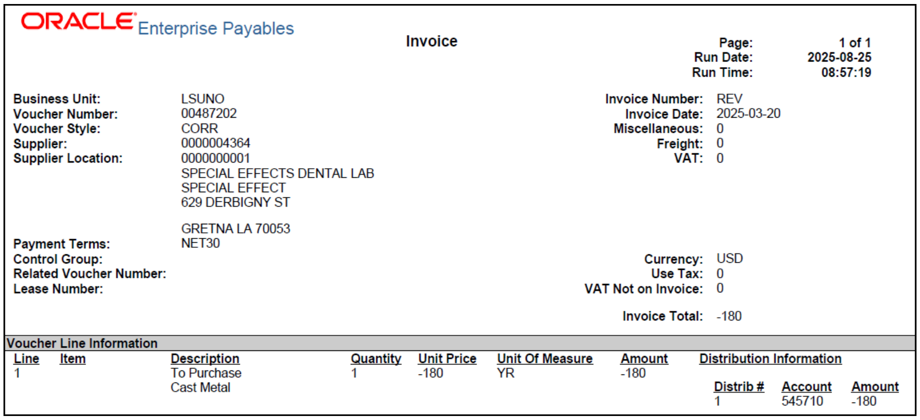
View Attachments

Business Unit LSUNO
Voucher ID 00487202

Attachments

Sequence	Attached File	Attachment Description	Entered By
1	Test_doc_for_c19.docx		Doss, Barbara A

6. View Printable Version



ORACLE Enterprise Payables

Invoice

Page: 1 of 1
Run Date: 2025-08-25
Run Time: 08:57:19

Business Unit: LSUNO
Voucher Number: 00487202
Voucher Style: CORR
Supplier: 0000004364
Supplier Location: 0000000001
SPECIAL EFFECTS DENTAL LAB
SPECIAL EFFECT
629 DERBIGNY ST

GRETNA LA 70053
Payment Terms: NET30
Control Group:
Related Voucher Number:
Lease Number:

Invoice Number: REV
Invoice Date: 2025-03-20
Miscellaneous: 0
Freight: 0
VAT: 0

Currency: USD
Use Tax: 0
VAT Not on Invoice: 0

Invoice Total: -180

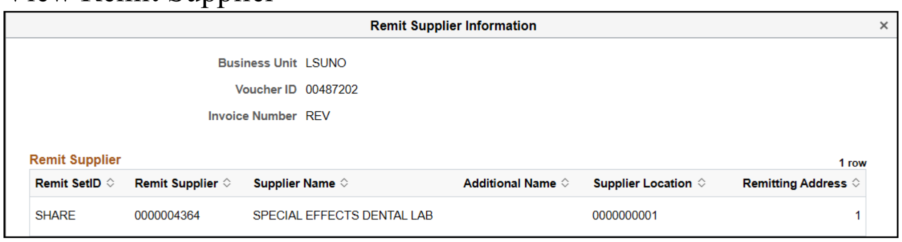
Voucher Line Information

Line	Item	Description	Quantity	Unit Price	Unit Of Measure	Amount
1		To Purchase Cast Metal	1	-180	YR	-180

Distribution Information

Distrib #	Account	Amount
1	545710	-180

7. View Remit Supplier



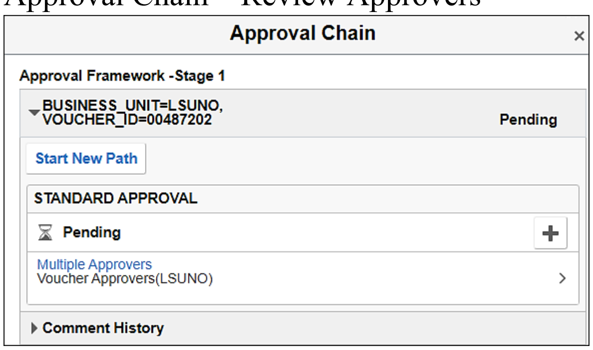
Remit Supplier Information

Business Unit LSUNO
Voucher ID 00487202
Invoice Number REV

Remit Supplier 1 row

Remit SetID	Remit Supplier	Supplier Name	Additional Name	Supplier Location	Remitting Address
SHARE	0000004364	SPECIAL EFFECTS DENTAL LAB		0000000001	1

8. Approve
9. Approval Comments *(Optional)*
10. Deny or Hold *(Required)*
11. Approval Chain – View all Approvers Comments
12. Approval Chain – Review Approvers



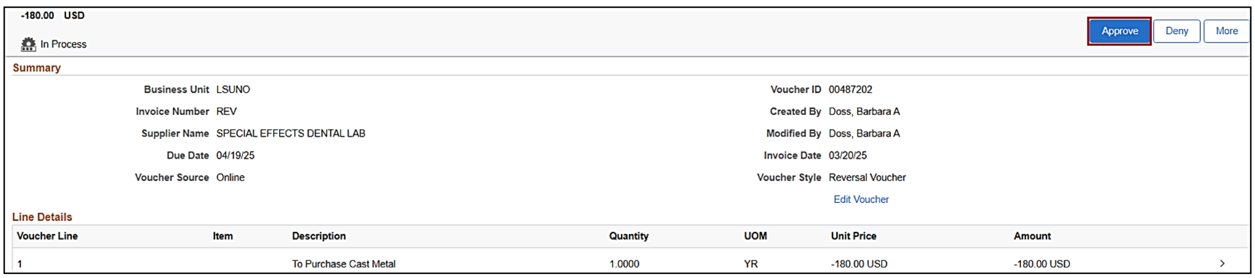
If you are not the correct approver, notify LSUNO ADMIN to reassign the voucher to the correct approver by sending a request to NOACCTACCTPAY@LSUHSC.EDU.

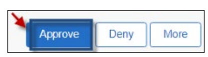
Working Pending Vouchers

You can now complete one of the following tasks:

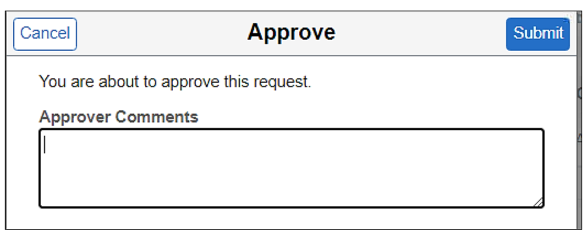
- **Approve –** Approved vouchers will be processed for payment.
- **Deny** – Comments are required prior to denial. **Deny** actions terminate the workflow process. Vouchers will be deleted and re-entered. An email for all **Deny** actions will be sent to LSUNO ADMIN, the Accounts Payable Coordinator who entered the voucher and the Approver who denied the voucher.
- **Hold** – Comments are required prior to hold. **Hold** actions prevent vouchers from completing the workflow process. An email for all **Hold** actions will be sent to LSUNO ADMIN, the Accounts Payable Coordinator who entered the voucher and the Approver who placed the voucher on hold.

Approve a Voucher

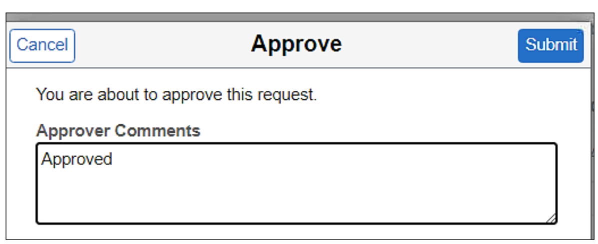


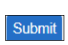
If it is ok to pay this voucher, click the 

button.

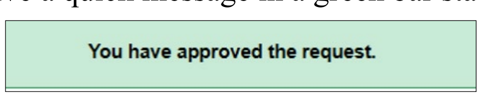


Enter *Comments* if needed.(*Approval Comments* are not required)



Click 

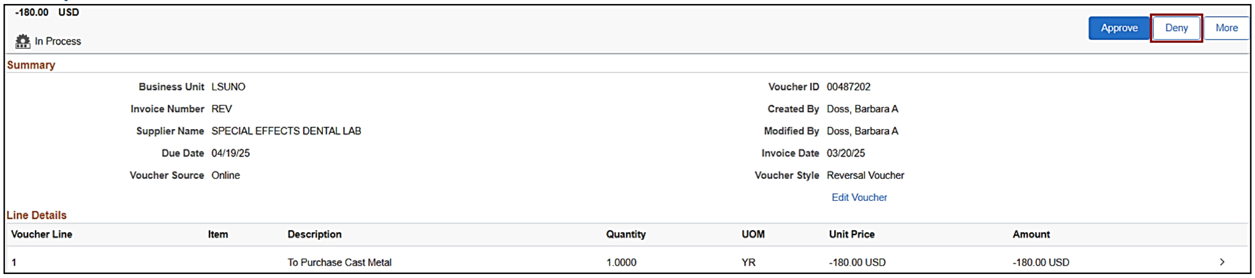
You will receive a quick message in a green bar stating that



The voucher is approved and is no longer listed in the approvals list.

- ✓ If there are issues with this voucher that require further review, proceed to the next step of ***Deny a Voucher.***

Deny a Voucher



Reasons for Denials:

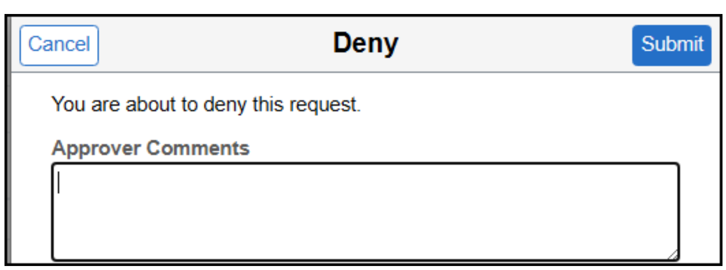
1. Department says the chart-string/account code is incorrect
   a. AP cannot change chart-string information; if department is requesting account code and/or chart-string change, the denied voucher must be deleted/closed and the PO must be modified.
   b. Voucher must be deleted or closed – AP Management only.

2. Incorrect amount/quantity on voucher
   a. If the voucher has NOT gone through matching, doc tolerance, budget checking, AP can make this change on the voucher and resubmit for approval.
   b. If processes have run against denied voucher, the voucher must be closed (AP Management only) and reentered.

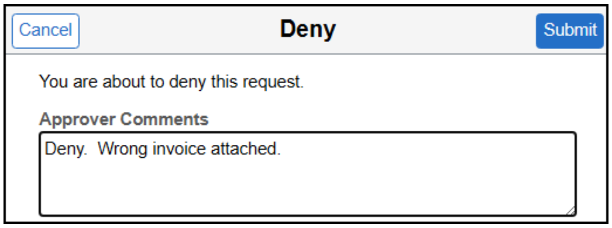
3. Pricing on invoice is incorrect or does not match to PO
   a. Contact buyer to adjust PO.
   b. Contact supplier to send adjusted/correct invoice.
   c. Voucher must be deleted or closed-AP Management only.

When denying approval for a voucher, you will be required to add a comment.

Select 



Enter your comment in the available text box.



Select 

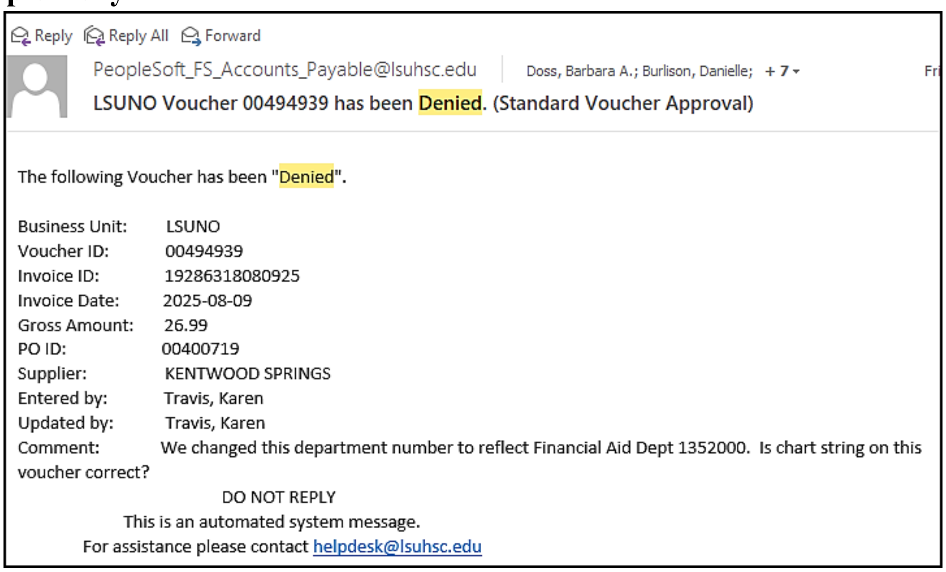
You will receive a quick message in a green bar stating that "Your request has been denied".

The status of the Voucher has been updated to "***Denied***"

You can view the Denied Voucher details by using Voucher Inquiry.

Once you click **DENY**, an email notification will be sent back to the LSUNO ADMIN, the Accounts Payable Coordinator who entered the voucher and the Approver who denied the voucher. Once denied, no additional processing or approvals can be performed.

Sample Deny Email


Reply Reply All Forward

PeopleSoft_FS_Accounts_Payable@lsuhsc.edu Doss, Barbara A.; Burlison, Danielle; + 7

LSUNO Voucher 00494939 has been Denied. (Standard Voucher Approval)

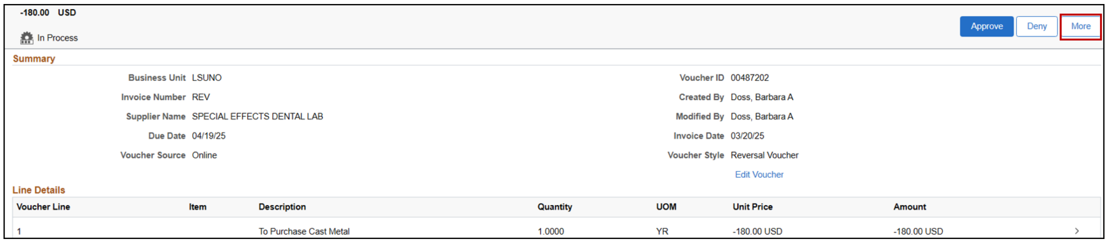
The following Voucher has been "Denied".

Business Unit: LSUNO
Voucher ID: 00494939
Invoice ID: 19286318080925
Invoice Date: 2025-08-09
Gross Amount: 26.99
PO ID: 00400719
Supplier: KENTWOOD SPRINGS
Entered by: Travis, Karen
Updated by: Travis, Karen
Comment: We changed this department number to reflect Financial Aid Dept 1352000. Is chart string on this voucher correct?

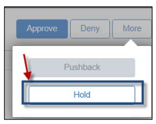
DO NOT REPLY
This is an automated system message.
For assistance please contact helpdesk@lsuhsc.edu

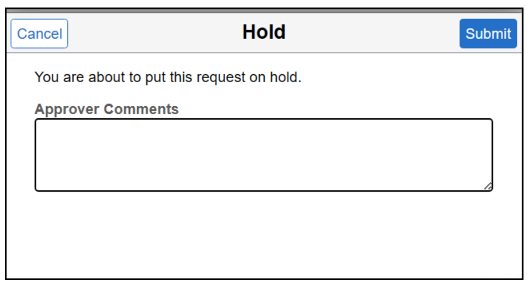
Hold a Voucher

By selecting this option, the transaction is placed on **Hold** until the Approver or the ADMIN staff take further action. A voucher that is placed on **Hold** will not be selected for payment.

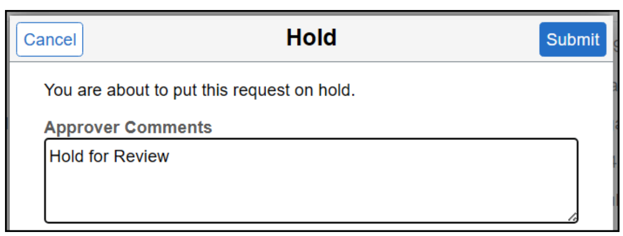


Select 

Select 



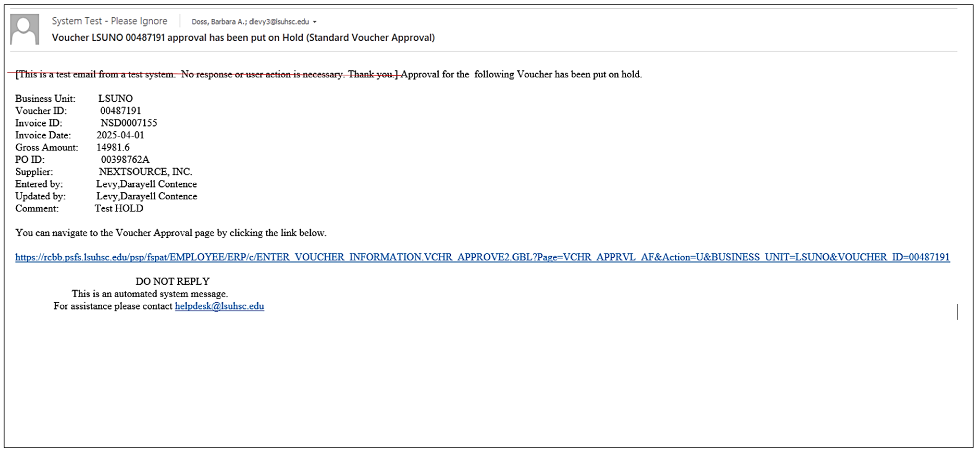
Enter your *Required* Approver Comments.



Select 

You will receive a quick message in a green bar stating that "You have put the request on Hold"

Once you click **HOLD**, an email notification will be sent to VAF ADMIN for changes (if required).



System Test - Please Ignore | Doss, Barbara A.; dlevy3@lsuhsc.edu

Voucher LSUNO 00487191 approval has been put on Hold (Standard Voucher Approval)

~~[This is a test email from a test system. No response or user action is necessary. Thank you.]~~ Approval for the following Voucher has been put on hold.

Business Unit: LSUNO
Voucher ID: 00487191
Invoice ID: NSD0007155
Invoice Date: 2025-04-01
Gross Amount: 14981.6
PO ID: 00398762A
Supplier: NEXTSOURCE, INC.
Entered by: Levy,Darayell Contence
Updated by: Levy,Darayell Contence
Comment: Test HOLD

You can navigate to the Voucher Approval page by clicking the link below.

https://rcbb.psfs.lsuhsc.edu/psp/fspat/EMPLOYEE/ERP/c/ENTER_VOUCHER_INFORMATION.VCHR_APPROVE2.GBL?Page=VCHR_APPRVL_AF&Action=U&BUSINESS_UNIT=LSUNO&VOUCHER_ID=00487191

DO NOT REPLY
This is an automated system message.
For assistance please contact helpdesk@lsuhsc.edu

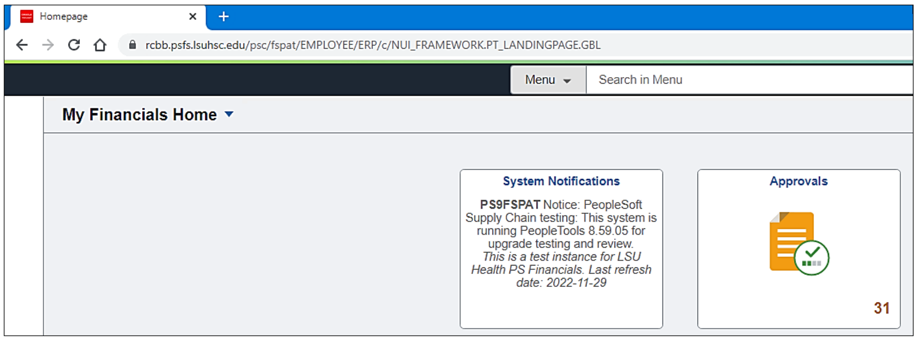
NOTE: Vouchers placed on **Hold** should be monitored as no additional workflow email notifications will be sent. All future communications will be sent via regular email.

Once the voucher is ready, select it and click Approve.

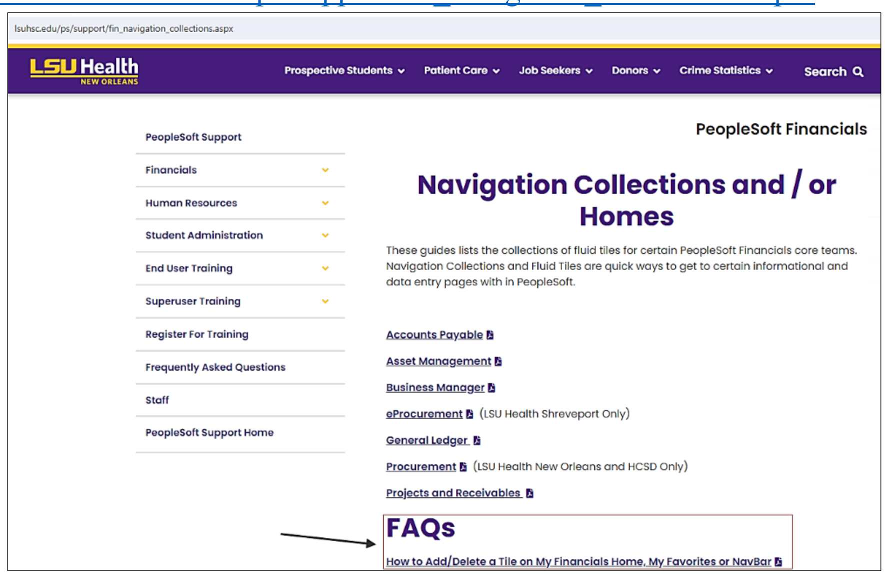
Approving Vouchers via Approvals tile

There are times when you will need to view all vouchers that require approval instead of selecting the link from individual your emails.

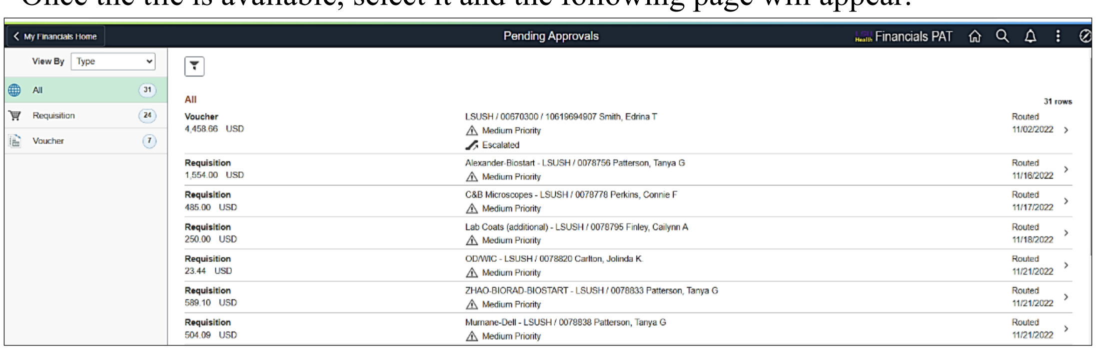
This can be accomplished by selecting the Approval tile from your "My Financials" Homepage.



Note: If you have not added this tile to the homepage, please see the delta document located at https://www.lsuhsc.edu/ps/support/fin_navigation_collections.aspx\

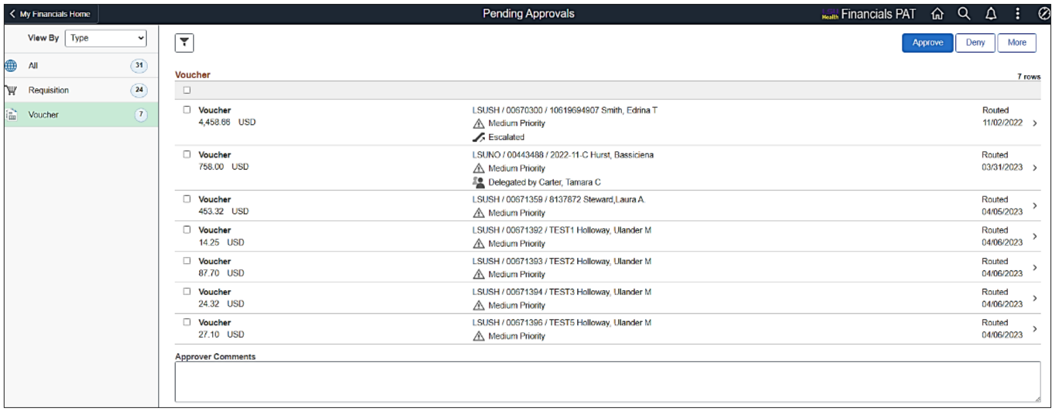


Once the tile is available, select it and the following page will appear.



Click 

on the left hand side of the page to view all vouchers that need to be reviewed/approved.



Click the voucher line and proceed with your action of ***Approve, Deny*** or ***Hold*** as discussed in the "***Working Pending Vouchers***" section above.

Approval – Timeouts

Escalation Schedule

Vouchers that are not approved, denied, or placed on hold will be subject to email reminders on a 7, 14, and 21-day schedule.

On the 28th day, an email is sent to VAF ADMIN regarding pending vouchers.

Approval Escalation email is shown below. If received, proceed to the Approvals tile to approve the voucher.

-----Original Message-----
From: PeopleSoft_FS_Accounts_Payable@lsuhsc.edu <PeopleSoft_FS_Accounts_Payable@lsuhsc.edu>
Sent: Wednesday, March 13, 2024 5:11 AM
To: Tran, Hue <HTran2@lsuhsc.edu>; Gonzales, Michele S. <mgonza@lsuhsc.edu>; Doss, Barbara A. <bdoss@lsuhsc.edu>; Burlison, Danielle <DBurli@lsuhsc.edu>; Rouzan, Eugene <ERouza@lsuhsc.edu>
Subject: Voucher LSUNO 00467280 approval timeout has expired. Please review. (Standard Voucher Approval)

A voucher has been timed out by the escalation process. Please review this voucher because it is overdue.

Business Unit: LSUNO
Voucher ID: 00467280
Invoice ID: 3561403815
Invoice Date: 2024-03-05
Gross Amount: 496.32
PO ID: NO033016
Supplier: STAPLES CONTRACT & COMMERCIAL LLC
Entered by: Oatis, Chavella L
Updated by: Oatis, Chavella L

You can navigate to the Voucher Approval page by clicking the link below.

https://prd.psfs.lsuhsc.edu/psp/fsprd/EMPLOYEE/ERP/c/ENTER_VOUCHER_INFORMATION.VCHR_APPROVE2.GBL?Page=VCHR_APPRVL_AF&Action=U&BUSINESS_UNIT=LSUNO&VOUCHER_ID=00467280

DO NOT REPLY
This is an automated system message.
For assistance please contact helpdesk@lsuhsc.edu

Remember, Accounts Payable **CANNOT** pay the voucher until it has been approved and all processing is completed!!

Support

Should you have any questions or issues, please contact
NOACCTACCTPAY@LSUHSC.EDUor DBURLI@LSUHSC.EDU

END OF PROCESS