Concepts
- Vouchers are created when Accounts Payable receives a supplier invoice.
  - Sent to Accounts Payable
  - Sent electronically to BearBuy
- Voucher Org Node Approval is required when the invoice is greater than $1,000 for Catalog and Non-Catalog Form based transactions.
- Regardless of the voucher total amount, Voucher Org Node Approval is required for Services, After the Fact, Subawards and Payment Requests.

Accessing Vouchers Pending Review and Approval
1. Navigate to Orders & Documents>Approvals>My Approvals.
2. On the resulting My Approvals page, use the Group Results By: option to group vouchers by List or Folders.
   a. Folders: You would select the folder you would like to work in.
   b. List: You can sort or filter your My Approvals list.

Assign a Voucher to yourself
1. Navigate to Orders & Documents>Approvals>My Approvals
2. Select the voucher number.
3. From the Available Actions drop-down, select Assign and click Go.

Adding Comments/Attachments to the Voucher
1. Within the voucher, navigate to the Comments tab.
2. Click the Add Comment button.
3. Enter your comments, then check the Email notification(s) box next to the individuals whom you want the email to be sent.
   a. To add individuals, select the add email recipient link.
4. Enter comment.
5. To attach documents select the Browse button.
6. From the pop-up window, select the document you wish to attach and click open.

7. Click Add Comment.

Approving a Voucher
Once you’ve completed your review and determined that the voucher is ok to pay:
1. In the assigned voucher, navigate to the Available Actions drop-down menu.
2. Select Approve/Complete Step and click Go.

Forward a Voucher
If the voucher needs corrections (i.e. duplicate invoice, incorrect remit to, misapplied lines, etc) you must forward the voucher to Accounts Payable.
1. In the assigned voucher, navigate to Available Actions.
2. From the Available Actions drop-down, select Forward and click Go.
3. Select the Analyst in Accounts Payable who should receive the forwarded voucher – the Analyst name is listed on the General section as Vouched By.
   a. For electronic invoices contact bearbuyhelp@berkeley.edu.
4. In the pop-up note, enter a Forward reason note. Click the Forward button.

Reject/Cancel a Voucher
1. In the assigned voucher, navigate to the Available Actions drop-down menu.
2. Follow the steps outlined in the Forward a Voucher section.

Return a Voucher to the Shared Folders
1. In the assigned voucher, navigate to the Available Actions drop-down menu.
2. From the Available Actions drop-down, select Return to Shared Folder.
3. Select Go.

Assign Substitute Approvers
To have a substitute approver assigned, contact the BearBuy Help Desk, bearbuyhelp@berkeley.edu.