## 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**.
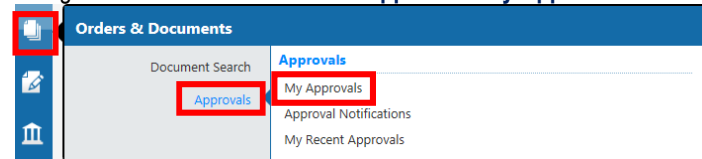
2. On the resulting **My Approvals** page, use the **Group Results By**: option to group vouchers by **List** or **Folders**.
   a. **Folders:** You would select the folder you would like to work in.
   b. **List**: You can **sort** or **filter** your **My Approvals** list.
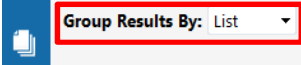
Assign a Voucher to yourself

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**.
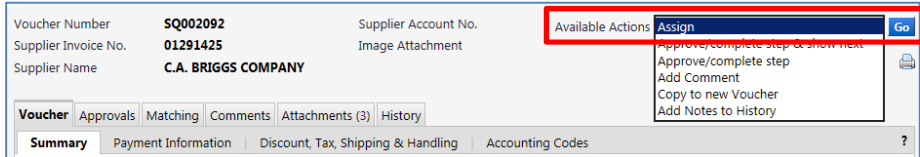
Adding Comments/Attachments to the Voucher

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 **Vouchered By**.
   a. For electronic invoices contact bearbuyhelp@berkeley.edu.
4. In the pop-up note, enter a **Forward reason** note. Click the **Forward** button.
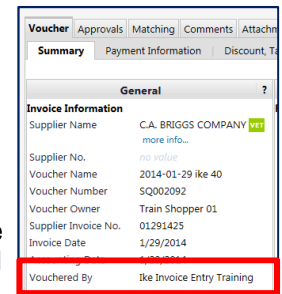
Reject/Cancel a Voucher

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.