Processing Non-PO Vouchers with Workflow

1. To **Budget Check** a saved voucher, use **Invoice Information** tab, and select **Budget Checking** from dropdown menu & click **Run**.
2. A new message box will appear. Click **Yes** to wait for Budget Checking.
3. Click **Attachments(0)** link to upload invoice.
4. After budget checking is complete, click **Submit for Approval**.
5. Click OK to continue

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**PeopleSoft Tips:**

- Budget checking is performed after voucher has been successfully SAVED with a Voucher ID.
- Please wait for voucher to complete budget checking process.
- The **Submit For Approval** button only appears after successful budget check.
- Enter a detailed description of purchase. Approvers will view details.
6. Select the Summary tab to see voucher summary information.
7. Click the Approval History hyperlink to view complete routing workflow.
8. Please verify document is routing to your intended approvers.

**PeopleSoft Tips:**
- If the budget checking process is approved, the **Budget Status** will read **Valid**.
- If the budget checking process failed, the **Budget Status** will read **Exceptions**.
- Identify next routing approval steps in workflow.
- Accounts Payable Office will be the final approver.