UCONN HEALTH

HuskyBuy Training Manual

New Invoice Approvals Experience

Invoices must be approved by a HuskyBuy user with Signature Authority (SA) on the included FOAPAL. (Reminder - If a paper/email invoice is received by the department, it still will need to be forwarded to A/P at accountspayable@uchc.edu)

If the PO Owner <u>does not</u> have SA, they can approve the Invoice but also must assign an Ad-Hoc approver. SEE SECTION 1A

If the PO Owner *does* have SA SEE SECTION 1B

ALL USERS can navigate to the Approvals screen by either the Action Items located at the top right of HuskyBuy and clicking Invoices:

		Action Items			
Simple Advanced	Go to: Non-Catalog Item F				trac
Search for products, suppliers, forms, part number, etc.		Carts Assigned To Me		0	Q
		Invoices		0	
-		Orders			
***	Research/Clinical Lab	My Returned Requisitions		0	2
New Stationery Supplier					

Or they can navigate to the screen by clicking the Accounts Payable icon on the Navigation Bar on the left \rightarrow choose Approvals \rightarrow Invoices to Approve

ł														
	Simple Advanced			Go to: Non	-Catalog Item	Favorites	Forms	Shop	Quick Order	Browse:	Suppliers	Categ	pories	Contracts
	Search for products, supplier	rs, forms, p	art number, etc.											Q
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2	Invoices	,	Quick search Invoices to Approve	Q		D	(BIO FU	D	(BrandNu)	C	Habar KealthCare		Selfactory S	

SECTION 1A - PO OWNER WITHOUT SA

In the Approvals screen click the down arrow to expand, if necessary, and click an Invoice # to open



In the popped window search and choose the Ad-Hoc Approver with SA \rightarrow add a Comment if needed \rightarrow click Save.

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on, C' ates	After	Ad-hoc 1	
	Ad-Hoc Approver	Type to filter Q	
	Comments		
		1000 characters remaining	
		Save	e

The Ad Hoc Approver has been added to the workflow and a new Workflow Step has been added. (Please note you can change the Ad-Hoc Approver if needed.) Click the appropriate response in the upper right and the Invoice will move into the new Ad-Hoc workflow step.

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	Summary Matching Supplier Message	es Comments Attachments	History						
ío	Terms Discount 0.00 USD					-			
8	Invoice Name 2022-03-24 ethibeault 02						Submitted 3/24/2022 3:28 Ellen Thibeault	PM	
血	Ad-Hoc Approver Ellen Thibeault Change	Payment Information	•••	Discount, Tax, Ship	oping & Hand		O PO Owner Im Active Tony Tester	voice Approv	
ш	Greate Date 3/24/2022	Accounting Date 3/24/2022		Discount, tax, shippin Allocation	g & handling Weighted		Ad-hoc 1 Future		
	Invoiced By				Header-level		AP SA Review	N	
	Match Status			Terms Discount	0.00 USD		- Houre		

SECTION 1B – INVOICE APPROVERS WITH SA

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	Approvals						۲	0	Create Date Newest Fit	st 🕶 🚺	pprove All Match	ed Invoices
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	All Dates			INVOICE NO.	SUPPLIER INVO	ICE NO.	SUPPLIER NAME	A	SSIGNED APPROVER	CREATE DATE	POI	
5	View Approvals My Approvals			11000664	IIO		Abcam Inc 🛥	E	llen Thibeault	3/25/2022 12:00 PM	POE	Ľ ~
	Assigned Ap	+ Ellen Thib \times		Due Date		4/9/2022				No. of Lines:		1
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հ											ADS	SA Revi		
	Create Date	Accounting Date 3/25/2022			Discou	nt, tax, sh	lipping	& handling			U futu		ew	

The Invoice copy will be attached to the HB Invoice - review as needed. Click the appropriate response in the upper right and the Invoice will move into to the next Workflow Step.

Note: Each approver can Ad-Hoc the invoice to another approver if multiple approvals are necessary to pay the invoice. For example, additional PI Approval. The same steps above should be followed with the last approver just clicking Approve/Complete with no Ad-Hoc Approver selected.

Once the Requisitioner has approved the Invoice it returns to the A/P Invoice owner who will verify SA in Banner, proceeding with the Approval process if the SA matches or returning it to the PO owner to try another Requisitioner.

If a user without SA approves the invoice will be returned for a new, corrected invoice approver.



You can find a Signature Authorized FOAPAL user in the UCHC APEX application (user must be logged onto UCH's network to access):

http://nso-banner-pssb.uchc.net:8920/apexprod/f?p=104:1:0:...:

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<u>107</u>	Promissory Notes								
108	Office of Logistics Mgmt Ap	plication							
109	Finance Transfer Voucher	Application							
110	Signature Authorization (Im	age View)							
116	AR Contract Billing Applica	tion							
<u>118</u>	One-Time Payment Inquiry								
<u>119</u>	Travel Reimbursements								
120	Finance Maintenance								
126	Journal Web Entry								
128	File Review / Remediation								
129	Bank Reconciliation								
<u>134</u>	A/P Inquiry & Maintenance	Application							
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